WORLD-SYSTEMS ANALYSIS AND COMPARATIVE EDUCATION IN THE AGE OF GLOBALIZATION

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RESUMEN

WORLD-SYSTEMS ANALYSIS Y EDUCACIÓN COMPARADA EN LA ERA DE LA GLOBALIZACIÓN

Este artículo investiga la aplicación de world-systems analysis (WSA) al estudio comparativo de sistemas educativos. Se han identificado dos principales aproximaciones teóricas al estudio de tendencias: realista político y neoinstitucionalista. A raíz de una discusión de sus orígenes intelectuales y los supuestos básicos, el artículo se convierte en un análisis de la articulación de world-systems análisis (WSA) con la creciente globalización de la investigación. Las interacciones entre las fuerzas económicas globales y culturales y los contextos locales se muestran en los estudios de casos representativos en el ámbito de la educación comparada e internacional. Se presta especial atención al impacto de los principales organismos gubernamentales internacionales, así como organizaciones no gubernamentales sobre las agencias de la política educativa. Los avances en las tecnologías de la información y comunicación, que comprimen el tiempo y el espacio, se analizan con respecto a cómo se forma la naturaleza del trabajo y las respuestas del sistema educativo. La penúltima sección contrasta la "globalización desde arriba" con la "globalización desde abajo", los movimientos de protesta cruzada nacional que une encaminados a lograr sistemas de educación más equitativa y una sociedad más justa. En la sección final se resumen las estrategias para el análisis de cómo los diferentes worldsystems, en el marco más general de la investigación de la globalización, pueden contribuir a la construcción de teorías y a una política educativa más inteligente, principales metas de la práctica de la educación comparada e internacional.

ABSTRACT

This article explores the application of world-systems analysis (WSA) to the comparative study of education systems. Two main theoretical approaches to the study of transnational trends in education are identified: namely political realist and neoinstitutionalist.[i] Following a discussion of their intellectual origins and basic assumptions, the article turns to an analysis of the articulation of world-systems analysis with the growing body of globalization research. The interactions between global economic and cultural forces and local contexts are illustrated in representative case studies in the field of comparative and international education. Special attention is given to the impact of major international governmental agencies as well as nongovernmental organizations on education policy agencies. Advances in telecommunication technologies, which compress time and space, are then analyzed with regard to how they shape the nature of work and education system responses. A penultimate section contrasts "globalization from above" with "globalization from below," the cross-national linking protest movements aimed at achieving more equitable education systems and just societies. The concluding section summarizes how different approaches to worldsystems analysis, within the more general framework of globalization research, can contribute to theory-building and more enlightened educational policy and practice- principal goals of the field of comparative and international education.

[i] Paulston (1977) and Ginsburg *et al*. (1990) have referred to these major theoretical approaches as "equilibrium" and "conflict," while Hurn (1993) uses the terms "consensus" and "conflict" to describe two major paradigms for studying education and society. This author prefers Hurn's terms and will occasionally use them to describe the institutionalist and realist approaches to world-systems analysis.

Differing Approaches

Two major streams of world-systems analysis (WSA) appeared in the social sciences and history literature in the late 1960s to early 1970s. One was associated with Marxistbased analyses of the workings of the international capitalist system, beginning with the dependency theories of Gunder Frank (1969), Fernando Henrique Cardoso and Ernesto Falleto (1969), and Theotonio Dos Santos (1970a, b) on Latin America, and Walter Rodney (1972, 1974) and Samir Amin (1970, 1973) on Africa, and culminating in the world-systems scholarship of Emanuel Wallerstein (1974, 1980, 1989).[i] The other stream is associated with what has been called the "world culture" theory and the "neoinstitutionalist" approaches of Stanford sociologist John W. Meyer with his students and colleagues.[ii] The more consensus-oriented approach of Meyer and associates to the workings of a transnational cultural and social system has focused on the establishment and expansion of schooling around the world, principally in the post-World War II period, and particularly in relationship to the creation of citizens and modern polities. The more conflict-oriented school of researchers has focused on the economic dimensions of the world capitalist system with little, if any attention, to the cultural and educational dimensions of the system. In his 1980 essay Robert Arnove, a former student of Meyer, urged his colleagues in the field of comparative and international education to take up world-systems analysis as the necessary framework for understanding educational trends around the world, from curriculum reform to the language of instruction, and the outcomes of school expansion (Arnove, 1980).

Institutionalist Perspectives

The world culture and society work of Stanford University professor John W. Meyer and associates began with attempts to explain the determinants of the global expansion of education systems. In his earliest study, Meyer (1971) first examined country indicators of levels of economic growth and per capita expenditures on education, type of political regime, and colonial past among others to explain the conditions under which countries were likely to increase access to education. Although his findings indicated that wealthier countries were more likely to expand education at all levels, with modernization-oriented governments tending to expand secondary education, and mobilization political systems (e.g., socialist countries) giving emphasis to primary and higher education, these national-level variables did not adequately explain why education was expanding everywhere at a rapid rate (Meyer, 1971).

In a significant collective work entitled *National Development and the World-System: Educational, Economic, and Political Change, 1950-1970*, Meyer, and Hannan (1979) concluded that school expansion during this period could better be explained as "a function of the available population to be educated and the level of education existing in

1950." The important point for world-systems analysis, however, was this: "Education everywhere expanded independent of the constraints and stimuli that economic, political, and social structures provided in previous times. This universal increase in education has led us to speculate that the causes of this expansion lie in the characteristics of the contemporary world system, since such characteristics would affect all nations simultaneously. We offer these speculations as directions for future research" (Mayer & Hannan, 1979: 53).

Further research by Boli and Ramirez (1992), for example, postulated that the institutionalization of compulsory schooling around the world in relation to widely prevalent norms and an ideology concerning the nature of societal and personal development can be traced to the Enlightenment project that followed the break-up of Latin Christendom. The

glorification of God was replaced by the celebration of the human project which, by the late twentieth century, became identified with economic growth; and a preoccupation with the salvation of the soul evolved into the notion of the development of human potential. Boli and Ramirez maintain that formal systems of education represent, according to a universalistic ideology, not only the means by which nations modernize and prosper economically, but also the surest route to enhancing the talents of individuals. As a mandatory requirement of all children and youth of certain ages and as an institution that is regulated by the state, schooling also becomes the agency for creating citizens with equal responsibilities and rights.[iii] Their findings, based on an analysis of six cohorts of countries in relationship to the time lapsed between political independence or state formation between 1820 and 1990 and the establishment of compulsory education systems, indicate that "mass schooling has become the norm in every region throughout the world" (Boli & Ramirez, 1992: 37).

Moreover, those regions most incorporated into the Western model of society or attempting to resist Western domination in modernizing their countries (e.g., Japan 1872-1886) also tended to establish rule-governed schooling earlier and more extensively (Boli & Ramirez, 1992: 38).

According to the neoinstitutionalist theoretical framework, the constitution of institutions, like schooling, as well as the construction of nation-states with citizens, is based on widely held and deeply ingrained norms and expectations concerning the way the world is and should be ordered. Meyer *et al.* (1997) argue that "Diffuse functional models about [e.g., the importance of formal schooling to economic growth] . . . actors, actions, and presumed causal relations, are centrally constitutive of world culture."

They provide an example that dramatically illustrates the workings of contemporary world society and culture. They hypothesize what would happen if a previously unknown island society had been discovered, one that had been totally isolated from contact with the rest of the world:

Our island society would obviously become a candidate for full membership in the world community of national and individuals. Human rights, state-protected citizen rights, and democratic forms would become natural entitlements. An economy would emerge, defined, and measured in rationalized terms and oriented to growth under state regulations. A formal national polity would be essential including a constitution, citizenship, laws, educational structures, and open forms of participation and communication (Meyer *et al.*, 1997: 173-74)

The basis for universalistic rights and obligations of individuals and an emphasis on the rational ordering of society derive from the persuasive power of contemporary world culture, rather than the imposition of norms based on unequal relationships between nation-states. Here the institutionalists draw a distinction between themselves and the world-systems perspectives of the "realists" (i.e., Wallerstein, and other conflict theorists): "Prevailing social theories account poorly for these changes [in the hypothetical island]. Given a dynamic sociocultural system, realist models can account for a world of economic and political absorption, inequality, and domination. They do not well explain a world of formally equal, autonomous, and expansive nation-state actors" (Meyer *et al.*, 1997: 174). The institutionalists' emphasis on culture-something which realists tend to downplay-may account for the extension of citizen rights to women, specifically the franchise in 133 countries from 1890 to 1990 (Ramírez *et al.*, 1997) or to improvements in the status of young people (Stanford Center on Adolescents, 2005), but the achievement of fundamental political and human rights may be as much the result of struggles of dispossessed peoples as it is the outcome of a benevolent worldwide system of entitlements based on universalistic norms. Levinson, for example, examines changing notions of adolescence and secondary education in Mexico not only with regard to external norms but the response of the Mexican state to pressures from the global economy and various political groups that contest governmental education policies they view as eroding the ideology of the 1910 Revolution (Levinson, 1999).

Realist Perspectives

The assumption of the institutionalists of an international system of autonomous nation-states being able to simultaneously achieve comparable levels of development is precisely what dependency and "realist" world-systems theorists challenge. By the late 1960s, Wallerstein, and his associates questioned the basic assumptions of prevalent theories in the social sciences as well as in international aid agencies concerning the causes of underdevelopment throughout Latin America and the Caribbean, Africa, and Asia. It was not lack of capital and expertise that was holding back these countries, but the very unequal relationships that existed between these countries in the "periphery" of the world economy and the "core" industrialized countries of North America and Europe. The longer the contact between the "core" and "periphery" in an unequal exchange of goods, if not exploitive colonialism, the more likely the country or region was to be underdeveloped-classic cases being the impoverished Northeastern Region of Brazil (Frank, 1969; Cardoso & Falleto, 1960), or Haiti, once the richest colony in Latin America and the Caribbean and now the poorest country in the region.

Wallerstein (2000: 3), who had written his dissertation "comparing the Gold Coast (Ghana) and the Ivory Coast in terms of the role voluntary associations played in the rise of the nationalist movements in the two countries," had spent a decade living in and writing about Africa as a political sociologist. In his quest (Wallerstein, 2000: 1-4) for "an adequate explanation of contemporary reality, so that . . . [he] and others might act upon it," he eventually came to the conclusion that "all analysis had to be simultaneously historic and systemic. . . ." In adopting this analytical framework, he was attempting to provide more adequate descriptions of the worldwide upheavals that were occurring in the late 1960s, and why they were likely to fail without radical structural change in the world capitalist system.[iv] At the same time, he was endeavouring to reframe the very nature of the social sciences by bridging the gap that existed in the social sciences "between ideographic humanism and nomothetic science" (the divide between human agency in particular contexts and normative laws of society and nature),[v] By analyzing vast stretches of history and various cycles in the world economy from the emergence of a capitalistic Western Europe between 1450 and 1600 (the "long century"), he was building on and refining "dependency theory," which some criticize as a stagnant view of relations between the core and the periphery. According to Clayton (2004), Wallerstein added the dynamic of historicity to this analysis as well as the notion of semi-peripheral countries and zones of the world, with some countries rising and falling from their previous positions in the global economy. For these reasons, the United States, which has been a successful hegemonic world power, is following the pattern of the Dutch and British empires, in losing its exclusive position as "hegemon" to China and possibly India.

While the institutionalists, particularly those associated with Meyer, definitely have an eye on education systems as a fundamental subject of their research on the workings of a global culture and society, Wallerstein's analysis has been criticized by Sklair (1999) and others for being too economistic as well as overly focused on nation-states as the principal actors in the global economy.[vi] Whatever these criticisms, the value of Wallerstein's approach to the world-system as the unit of analysis for understanding contemporary reality, especially the impact of transnational economic actors on national education systems, was perhaps first brought to the attention of comparative and international education in Arnove's 1980 essay in the *Comparative Education Review*.

Applying World-Systems Analysis to Comparative Education

Arnove's essay departed from the more consensual approach of institutionalists by problematizing the workings and outcomes of agencies promoting educational expansion and reform. Earlier essays had given only a brief nod to the fact that the Western model was a creation of "the economic and military success of the Western powers," (Boli & Ramirez, 1992: 38). There was an initial tendency not to give much attention to the workings of the major technical assistance and financial agencies involved in promoting, and in many cases imposing, education policy agendas. At the same time, insufficient attention was given to historically unequal economic and political relationships between countries based on various forms of direct domination (for example colonialism) or more indirect forms of overbearing influence

(sometimes referred to as "neocolonialism"). Enrolment patterns were one thing, but dropout and completion rates, and how unequal social structures determined who would attend the highest and most prestigious levels of schooling related to future income, power, and status also were not analyzed in great depth. Meyer and Hannan (1979), in their introductory chapter to *National Development and the World System*, do briefl y mention inequalities between and within countries; and later writings by Meyer, Boli, Thomas, and Ramirez (1997), Boli and Thomas (1997) certainly discuss the workings of United Nations agencies as well as nongovernmental organizations (NGOs) in promoting educational agendas with an emphasis on inclusion and extension of human rights.

But, as noted above, the world culture theorists differ markedly from the realists, who emphasize interstate power relations.

Political realists document the systemic ways in which hegemonic powers in core countries extract surplus labour from the coerced or semi-coerced labour of the noncore regions with consequent deleterious consequences for their education systems.

Schooling, rather than serving the interests of the majority in the periphery, abets the process of capital accumulation by hegemonic actors. By contrast, Meyer *et al.* (1997: 173) view various models of societal development as being "Carried by rationalized others whose scientifi c and professional authority often exceeds their power and resources." For Meyer *et al.*, "world culture celebrates, expands, and standardizes strong but culturally somewhat tamed national actors."

Favoring the viewpoint of the realists, Arnove (1980, 2003) argued that these international fi nancial and technical assistance agencies-notably the World Bank (WB), the International Monetary Fund (IMF), the United States Agency for International Development (USAID), the Canadian International Development Agency (CIDA), the Japanese International Cooperation Agency (JICA)-the large philanthropic foundations, especially the so-called "progressive ones" (Carnegie, Rockefeller, and Ford), and related research institutions financed by them, as well as lead universities in the North, were promoting policies and relationships that were not beneficial to the recipients of aid and essentially favored dominant groups in the metropolitan centres of the core countries. He concluded his essay by noting how world-systems analysis restored the international dimension to the field of comparative and international education and provided a framework for understanding educational development and reforms-at that time, comprehensive high schools, educational technologies such as television, open universities, and nonformal education. He argued that linking education policy initiatives to the workings of an international economic order helped "explain why expansion and reform, in so many cases, have failed to effect structural change in education or society, and indeed, why externally induced educational innovation may contribute to perpetuation of existing stratification systems within and between countries."

While not discounting the usefulness of institutionalist analyses of the workings of a transnational cultural system, Arnove noted, much in accord with Wallerstein's call for a more comprehensive social science linking the nomothetic with the ideographic, that "World-systems analysis not only expands macro analyses to take into account the actions of educational agencies in a truly international system, but it enhances our understanding of the sources of change and conflict in the micro system of school and classroom" (Arnove, 1980: 62).

The Challenge of Globalization Theory

Throughout the 1980s, the expanded focus provided by world-systems analysis spawned

numerous studies linking macro- and micro-level variables to explain the workings and outcomes of education systems. By the 1990s, these differing schools of worldsystems analysis were increasingly eclipsed by the catch-all phrase of "globalization," the most salient current theme in the field of comparative and international education according to a recent survey by Cook, Hite, and Epstein (2004: 136).[vii] Developments in computerization, telecommunications technologies, and the ways in which work was now organized-from "Fordist" mass production

within national boundaries to "Toyotism" just-in-time production distributed across the globe, led many to believe there was a qualitative change in the nature of capitalist accumulation that could not be adequately explained by diverse Marxist interpretations, including Wallerstein's WSA or the world culture and polity approach of Meyer and associates.[viii] This is a complex and extended debate that transcends the limitations of this chapter.

Briefl y, however, if there is a qualitative difference between globalization and WSA, it may be attributed to the dramatic compression of time and space (Harvey, 1989), with greatly improved technologies facilitating the flow of information and capital across national boundaries and bringing the distant and the local into closer relation in ways previously unimagined (Held, 1991; Held, 1999; Giddens, 2003). Others will argue that the expanded scope and intensity of these linkages are but a variation on the evolution of the world capitalist system or a universalistic world culture.[ix] What is important to note here is that the space-time dimensions of globalization be distinguished from the content of these informational and financial flows. Much of the literature in comparative education on globalization has equated increased interconnectedness with what has been called the "neoliberal" economic and education agendas that have been implemented across the globe. The term neoliberal derives from the neoclassic economic theories expounded by the dominant international institutions shaping national development policies (i.e., the World Bank and the International Monetary Fund). As summarized by Arnove, Franz, Mollis, and Torres (2003: 324), the theories are based on the work of the classic economists Adam Smith and David Ricardo, who believed that the role of the state consisted in establishing the conditions by which the free play of the marketplace, the laws of supply and demand, and free trade based on comparative advantage would inevitably redound to the benefit of all. Government policies based on these notions have led to a drastic reduction in the state's role in social spending, deregulation of the economy, and liberalization of import policies. The educational counterparts of these policies have included moves to decentralize and privatize public school systems. Also part of this package of education "reforms" is the emphasis on choice, accountability, standards, and testing by which the state's role is to specify goals and priorities and evaluate whether or not the various subnational administrative units, and even individual schools, achieve the desired results. At the higher education level, there is the "new managerialism" that applies the language and logic of the market place to overseeing the operations and outcomes of academic units (Deem, 2001; Hartley, 2003; Marginson & Mollis, 2001; Arnove, 2005).

In many respects, the abovementioned developments exemplify the standardization of rules and norms, the isomorphism that Meyer and colleagues had predicted in the constitution of national education systems. Divergence also is contained within their predictions based on certain tensions created by the incongruence between universalistic forces and diverse national characteristics.[x]

Illustrative Studies of WSF

The following sections review how the more consensual (institutionalist) and the conflict streams of WSA have merged in part with the more comprehensive, but amorphous, framework of globalization to shape research in the field of comparative and international education.

Clayton (2004) in a noteworthy review, "Competing Conceptions of Globalization," points out how WSA, with its historical dimensions, may contribute to comparative education research in ways that most globalization research (because of its short-term perspective) cannot. For example, as he notes, "We would ask not only how educational institutions around the world are today mediating and advancing the neoliberal agenda but how (or if) educational institutions mediated and advanced liberalism in centuries past, and how (or if) these successive clusters or ideologies differ" (Clayton, 2004: 294). According to Clayton, other studies benefiting from a critical, historical, economic perspective would include those on "the emergence of English as the global language, the global standardization of education credentials or knowledge, the loss of identity and so on" (Clayton, 2004: 294). In a major statement of the value of a world culture and society perspective, Meyer *et al.* (1997) suggest fruitful lines of inquiry. They include studying issues generated by the tension between external pressures to create modern school systems and internal realities that prevent the realization of beneficial reforms at the school and

classroom levels; between ideals related to the equitable distribution of school and policies promoted by reactionary governments and dominant groups who might view democratization of education systems and the teaching of democratic ideals as antithetical to social control and regime stability; or, between international models of years of schooling for different levels of an education system (e.g., 6, 3,3 for primary, middle, and secondary as specified by UNESCO) and what is appropriate for a specific country.

Time allocated to different subjects in national curricula has spurred a number of studies-notably Meyer, Kamens, and Benavot (1992) on *School Knowledge for the Masses*-that show both convergence, in amount of time given to science and mathematics instruction as part of the process of becoming a modern polity, as well as different local adaptations to this international trend. Benavot and Resh (2001: 505) have selected the case of Israel to show how convergence in the diffusion of common categories of curricular subjects across the world is paradoxically modified by another strong policy trend to devolve central state authority over education to subnational levels, a policy bolstered by an ideology promoting school autonomy. Moreover, Benevot, and Resh note that their findings of variations in implementing instruction in nationally mandated subjects "suggest that contextual factors like school structure, the socioeconomic background of students, and the successful mobilization of instructional resources affect the construction of school structure" (Benavot & Resh, 2001: 505).

Anderson-Levitt's (2003) edited collection on *Local Meanings, Global Schooling* problematizes from an anthropological perspective the convergence toward a single schooling model. In her introductory chapter, Anderson-Levitt raises the question "Is there one single global culture of schooling, or many?" Without taking into account local contexts and cultural meanings, it is unlikely that we will be able to explain adequately what content is actually transmitted, and learned. Her 2004 article on "Reading Lessons in Guinea, France, and the Unites States: Local Meanings or Global Culture?" explores how it is possible that reading instruction is both significantly similar and different across these three societies. Based on case studies of specific classrooms, she reaches the conclusion that a multi-level perspective (a "double vision") is required to see how both the transnational and national/local are interacting and simultaneously enabling and inhibiting teaching practices: "[T]he double vision of teaching leads to a double vision of educational reform efforts. On the one hand, we cannot expect any top-down reform to produce the same results in different places. On the other hand, local attempts to reform operate within a broad but real framework, the current transnational model of good teaching." (Anderson-Levitt; 2004).

The importance of taking into account human agency when studying teacher responses to international educational currents is the object of a study by Stacki (1999), on a UNICEF-funded innovative in-service teacher education program in Uttar Pradesh, India.[xi] The case study provides a richly textured, multi-layered account of the history of teacher education reform efforts in India; the role different agencies (international, national, and local) play in formulating and implementing this particular teacher empowerment project; and specifically how two female teachers respond to this professional development program.

How do students and community members respond to "the constraints placed upon their lives by the world system of incommensurate differences and their marginalized place within it"? These are the questions examined in Demerath's (1999) ethnographic study of Pere Village in Papua, New Guinea.[xii] He documents how the subjects of his study negotiate tensions emanating from global and cultural and economic forces that result in a situation of increasing educational credentialism, limited job markets, and threats to traditional community life. In order to cope with dim job prospects, many students reject continuing with their education and even belittle their peers who do.

These disenchanted youths glorify village life. Yet, it remains true that higher educational attainment could lead to jobs in the modern sector of the economy as well as access to desirable commodities not available outside urban areas. Villagers themselves are caught in the same dilemmas of choosing between the old and the new (Demerath, 1999: 102).

These studies (Benavot and Resh, Anderson-Levitt, Stacki, and Demerath) examine what Monkman and Baird (2002) have called the "how" of globalization. They give meaning to what otherwise remains an unexplained context or something that happens without understanding the processes at work:

Thus, much of the case study research on globalization focuses on national and local responses to "globalizing" pressures. A useful mapping of the relationships of the local within the global would result in a focus on the nature of national and local involvement or interaction within globalization processes. This conceptualization would more adequately reveal the interpenetration of the global and local and the mediating influence of nation-states and local communities. (Monkman & Baird, 2002: 498)

Monkman and Baird, in addition to calling for multiple-level analyses of the working of global forces on national and local contexts, argue for the value of studying discourse and participation-who is defining globalization in what terms and who is involved in international and national decisions defining educational strategies and policies.

International Institutions and the World-System Revisited

The issues of discourse and participation are addressed in Carnoy and Rhoten's (2002) guest editorial essay in a special issue of the *Comparative Education Review* on "The Meanings of Globalization for Educational Change." They call attention to the "ideological packaging" of globalization and its "effect on the overall delivery of schooling, from transnational paradigms, to national policies, to local policies" (Carnoy

& Rhoten, 2002: 2). As they note, this ideological packaging favors an emphasis on the economic goals of an education system-how it contributes to the internationally competitive position of a country-rather than to such important goals as contribution to national cohesion through equal treatment of various ethnic groups in a country.

This ideological agenda, according to Carnoy and Rhoten (2002: 2), is increasingly tied not only to global economic forces, but to "international institutions that promulgate particular strategies for educational change" (a point made earlier by Arnove, 1980). The discourse of these international agencies is tied to cost-benefit and production function analyses of the value of different levels and types of education, an analytical framework that former World Bank education staff member Heyneman (2003) admits has had serious limitations and negative consequences for more equitable and effective education policies[xiii] The workings and inter-institutional relations of the major international technical assistance and financial agencies is the subject of a growing body of scholarly work by Mundy (1999, 2002) and Jones (1992, 1993). Mundy (1999) for example, traces how UNESCO with its humanistic orientation toward life-long learning systems has lost its position as the leading United Nations agency setting policy directions for education to the more economically minded World Bank (a point reaffirmed by Heyneman, 2003). According to Mundy (1999: 46), UNESCO's views on education had changed by 1996. An internal report, *Learning, The Treasure*, noted that "technical change and economic globalization were rapidly undermining existing social policies, the structure of work, and global equity in general." In an earlier article, Mundy (1998) documented how the ideology of multilateralism (institutionalized coordination of relations among three or more states on the basis of generalized principles of conduct)[xiv] has changed from one of a "limited redistributive" set of values involving education (1945-1965) to a period of contestation, coming especially from the less-developed countries of the South "demanding a social welfare model of national development" (late 1960s to late 1970s) to the current, or ongoing, stage "during which neoliberal defensive and disciplinary forms of educational cooperation emerged" (Mundy, 1998: 476).

A consequence of this latest stage furthers the erosion of the redistributive model of educational multilateralism.

The emerging structures of global governance, economically, and educationally, now include major regional organizations like the European Union, the North American Free Trade Association, and the Asia Pacific Economic Cooperation (Dale & Robertson, 2002). In addition to the emergence of these regional organizations, the World Trade Organization has achieved an ascendant position in international commerce in education. The mechanisms and processes by which these organizations shape education systems have been analyzed by Dale and Robertson among others.

Dale (1999) specifies eight non traditional mechanisms and related organizational features that influence the nature of external effects on national policy.[xv]

In a further effort to open the "black box" of globalization, Robertson, Bonal, and Dale (2002) examine the General Agreement on Trade in Services (GATS). They provide a conceptual framework and a "rigorous set of analytic categories that might enable us to make sense of the profound changes now characterizing education in the new millennium" (1999: 472). Their model of "pluri-scalar governance of education," comprehends three dimensions: 1) three scales of governance going from the supranational, to the national, to the subnational; 2) the institutions of governance- the state, market, community, and household; and 3) governance activities consisting of funding, ownership, provision, and regulation (1999: 478). As they note in 1995, the General Agreement on Trade and Tariffs (GATT) was replaced by the World Trade Organization (WTO). The WTO is now a major, if not the most significant, player in constructing "a hypothetical world education system, free of barriers" that would involve "internationalization of educational credentials or a possible globalization of knowledge production and consumption but also would affect central aspects that largely have been under the control of nation-states. . ." (1999: 489). An important point is that for many countries the WTO is not simply "an instrument of global capital," but something that a number of nation-states are eager to join "as they seek to advance their own national interests in the global knowledge economy" (1999: 495).

Clayton (1998), in his article "Reconnecting World-System Theory for Comparative Education," made a similar point about the need to study the various ways in which nation-states respond to globalization and specifically international educational assistance.

These responses range from resistance to accommodation by "periphery students, teachers, administrators, and policy makers aware in varying degrees of the implications of their actions" (1998: 496). Clayton argues that these actions are best explained in relation to concepts of hegemony, class relations, and human agency.

An interesting question is how the position of a country in the world economy and its size, resources, and political strategic significance influence how much autonomy it has in responding to the policies and regulations of the World Trade Organization.

To what extent is state control over the nationally important and culturally sensitive domain of education compromised by joining the organization? What are the implications for a country like China (Zhou & Shi, 2003) as compared with an island-nation like Jamaica or an impoverished country like Nicaragua?

At the same time, another set of actors, namely nongovernmental organizations (NGOs), also erode state control over educational policy and practice.

Ascendancy of NGOS as International Actors

As Mundy and Lynn (2001) and others have pointed out, international financial and technical assistance agencies are increasingly working with nongovernmental organizations, many of whom are international in reach, to provide educational services once the exclusive domain of the state.[xvi] NGOs have become major transnational advocates for the universal extension of education as a human right. In many cases, binational, and multilateral donors consider it preferable to work with NGOs rather than government bureaucracies that are considered to be

corrupt and/or inefficient. This preference raises a number of major issues explored by Sutton and Arnove (2004) in their edited volume *Civil Society or Shadow State? State/Ngo Relations in Education*. The set of case studies ranging from Papua New Guinea to Peru examine these questions: As educational services providers and innovators, do NGOs relieve the burden on the state of providing universal basic education as well as adult education and literacy programs?

Conversely, do they erode the legitimacy of the state as the primary entity that establishes the goals, content, credentials, and materials of public schooling while also regulating key feature of the system's administration and financing? Do the NGOs, themselves, lose their legitimacy, moral authority, flexibility, and sensitivity to local needs, as well as their roles as advocates on behalf of grassroots initiatives as they serve as contractors for national governments or international and binational donor agencies? Moreover, as a consequence of their close relationship with these agencies, are they more likely to manifest the possible negative features associated with them like partisanship, cronyism, and corruption (Sutton & Arnove, 2004: x; Kamat, 2004)?

Illustrative of these questions is the case study by Christina (2001, 2006) which examines government-NGO relationships in the formulation and implementation of early childhood education in the West Bank. This study places the Palestinian case in historical and comparative context, illustrating the relations between global social forces and local cultural and political contexts. The study compares the differing visions and policy orientations of a model NGO with those of the Palestinian National Authority and international donor agencies. A wealth of data details the struggles of the principal actors in the early childhood program to remain sensitive to their goals of honoring indigenous culture while retaining their ideals of a child-centered, progressive education corresponding to international norms.

Ether Space and the Flow of Information

In addition to the traffic in aid, trade, and services across national borders, there is the flow of information. Instantaneous access to information is an integral component of the "new knowledge economy" (Castells, 2004; Carnoy, 2000). Telecommunication technologies have led to changes not only in the organization of work in the production of material goods but to how services like education are delivered. The impact of these technologies is particularly notable at the higher education level, where courses and, in some cases, entire academic programs are offered on-line and various partnerships or "franchising agreements" are forged between universities in the metropolitan centres of North America and Europe and the rest of the world. Problematic issues in these arrangements concern the language of instruction and the appropriateness of curricula.[xvii]

The most extreme form is a "virtual university." They raise questions concerning who "attends" such institutions and what the outcomes are for these students in relation to those who study in more traditional universities. Do universities, for example, lose their role in contributing to national culture or being centres of critique, if not opposition, to corrupt and repressive governments? Are public schools no longer the primary state-controlled locus for creating a collective identity and preparing citizens?[xviii] These issues are raised in the book by Edwards and Usher (2000) on *Globalization and Pedagogy: Space, Place and Identity*. New information and communications technologies create a 'diaspora space' in which individuals can liberate themselves from the limitations of established norms and create their own hybrid identities" (as summarized by Monkman & Baird, 2000: 501). The upside of this "ether space" is that individuals and their social groupings can now connect across national boundaries to those sharing similar interests or learn about those who otherwise would be a distant and unknown "other." The educational potential for creating more globally minded and multiculturally sensitive individuals is enormous. Teachers as well as students, at all age levels, can communicate with one another to share their everyday concerns and aspirations for a better world.

Politically, transnational movements for social justice are able to reinforce one another and call on the international community to support their struggles. This has happened with various movements-feminist, ecological, ethnic minority, trade union, and refugee among many-as they

demand fundamental human rights for their members, one of which is a right to a quality education. Education and the rights of indigenous groups, for example, is a current topic of interest in comparative education (see the special issue of *Comparative Education* (2003) as are themes pertaining to the citizenship status of immigrant and refugee groups.[xix] Just as there is globalization from above, there is globalization from below (Brecher *et al*., 2000).

Globalization from Below

Arnove (2004) has taken this notion to provide a framework for studying the locus of educational reform initiatives (a vertical axis indicating whether they are top-down or bottom-up) and their goals (a horizontal axis indicating whether they are primarily economic or political-cultural).[xx]22 A review of recent dominant policies-privatization, decentralization, choice schemes, and various accountability measures based on standardized testing-finds that they are largely initiated at the top in international and national bureaucracies, and that they are oriented, as previously discussed, toward economic goals. At the same time there are, as just mentioned, a growing number of grassroots initiatives aimed at the achievement of more equitable societies and education systems that are closely related to cultural identity movements.

How do these various initiatives relate to world-systems analysis? As is evident in the literature review, the programs initiated from above are integrally related to changes in the dynamics of the global economy, the demands for a different type of work force based on certain skills and knowledge. The new information age economy is one in which many individuals will be displaced and the rights of organized labor will be threatened by transnational corporations. These corporations seek out countries, and regions within them, where the greatest profits can be obtained for differing reasons-in many cases because labor is cheaper and more exploitable (Mexico, Indonesia, Guam, Vietnam), or because it is both cheaper and skilled (e.g., Bangalore, India) or, for all three reasons (China). As described, these trends reflect the predictions of world-systems analysis as formulated by Wallerstein and his associates. The disruptions caused by changes in the way capital is accumulated also help explain the phenomena of social protest movements from below. At the same time, these movements are inspired by the widely circulating ideals of human, civil, and political rights as explained by the writings of "world culture" neoinstitutionalists Meyer and associates.

The disruptions, manifestations of what Wallerstein (1997: 6) has called the "terminal crisis" in the historical system in which we live, present the opportunity for moving world-systems analysis to a more centrally prominent position in the social sciences and "formulating the central questions of the enterprise." (Wallerstein, 1997: 6) Among these questions for the social sciences are: "What are the processes of transition from one historical system to another?" And "What is the theoretical relation between the quest for truth and the quest for a just society." For Chase-Dunn (1999: 16), the current disruptions and crises represent an opportunity for diverse progressive movements to unite to bring about "global social democracy."

Conclusion

The diffuse phenomenon of globalization has reinforced the importance of world-systems analysis, whether of the consensus or conflict type, for the field of comparative education. One could say that the two streams of world-systems analysis have entered the ocean of globalization research. This confluence of systematically evolving intellectual currents has been beneficial. It has stimulated further inquiry to refine and elaborate the theory and methodologies that will enable scholars, policy makers, and practitioners to better understand the multidimensional, transnational trends shaping the workings and outcomes of education systems everywhere. Understanding the world is a key to changing it for the better-a goal much in accord with scholarship in the field of comparative education and its missions of contributing to theory building, more enlightened educational policy and practice, and ultimately to international understanding and peace.

[i]   Wallerstein, it should be noted, is indebted to the French school of socioeconomic historians associated

with the journal *Annales d' Histoire Economique et Sociale* and especially Fernando Braudel whose "long view" of historic formations and attention to minute detail is best illustrated by his magisterial three-volume *Civilization and Capitalism, 15th-18th Centuries* (1981).

[ii] Wikipedia encyclopaedia (2005) defines the "New Institutionalism" as "a social theory that focuses on developing a sociological view of institutions, the way they interact and the effects of institutions on society. It is significant in that it provides a way of viewing institutions outside of the traditional views of economics. . . ." Bruce Fuller (2004: 328) elaborates on this definition: "Old institutional theory, advanced by sociologists such as Arthur Stinchcombe and Jerald Hage, argued that formal organizations work from articulated goals and specified technologies and eagerly attempt to deliver on their promises. . . . Instead, the neoinstitutionalists emphasize that nations must make sense of their membership in a global social arrangement not always defined by their position in the world economy." For purposes of this essay, however, I have decided to use the term "institutionalist" perspectives.

[iii] For further discussion of this point, see Bendix (1996).

[iv] From an autobiographical statement by Wallerstein (2000). Also see Chase-Dunn (1999) and Chase-Dunn & Boswell (2000).

[v] Wallerstein (1997, p. 4) is careful to note that "world-systems analysis is not a theory but a protest against neglected issues and deceptive epistemologies." He continues, "It is a call for intellectual change, indeed for 'unthinking' the premises of nineteenth-century social science.... It is an intellectual task that has to be a political task as well, because - I insist - the search for the true and the search for the good is but a single quest."

[vi] Clayton (2004), however, believes this criticism isn't accurate as Wallerstein sees a decoupling between the economic and political spheres of the global system with the nation-state being but one component of various political formations working in conjunction with and sometimes an opposition to the world capitalist economy. Also see Chase-Dunn (2000) on this disconnect.

[vii] Among the books in the field of comparative education taking globalization as a major organizing theme are Arnove & Torres (1999, 2003), Burbules & Torres (2000), Stromquist & Monkman (2000), Suárez-Orozco & Qin-Hilliard (2004).

[viii] For further discussion of qualitatively different aspects of globalization, as compared with WSA, see McMichael (2000) and Martin (2000).

[ix] For further discussion, see Clayton (2004).

[x] The importance of the local is the focus of Deem's (2001) study of the "new managerialism" in higher education.

[xi] The study won the Comparative and International Education Society (CIES) Gail P. Kelly outstanding Dissertation award in 1999. A summary of the case study is found in Stacki (2004).

[xii] The study, based on his dissertation research, won the George Bereday Award for the best article in the *Comparative Education Review* in 1999. A noteworthy feature of Demerath's research is its illustration of the limitations of "rational choice theory" and "cost-benefit" analyses of education, as well as the social utility of certain courses of action, when specific sociocultural contexts are not taken into account.

[xiii] For further discussion of World Bank policies and their consequences, see King (2002), Soudien (2002), Moura Castro (2002), King (2002), and Bonal (2004).

[xiv] For further discussion, see Ruggie (1992, p. 571).

[xv] Two of the categories involve "borrowing" and "learning." For the difference between these two and their significance for comparative education, see Phillips and Ochs (2003). Also pertinent to the literature on "borrowing" and "lending" in education is the edited collection by Steiner-Khamsi (2004).

[xvi] Boli and Thomas (1997), for example discuss NGOs as major constitutive elements of an emerging "world polity."

[xvii] For a more general discussion of issues and challenges facing higher education institutions in the age of globalization, see Altbach, Bloom, Hopper, Psacharopoulos, and Rosovsky (2004), and Marginson & Mollis (2001), esp. pp. 599-600.

[xviii] With regard to challenges to the state from globalization as well as issues concerning theoretical frameworks for studying international education trends, see Welch (2001).

[xix] A different theoretical lens for viewing the ways in which different groups coalesce around common concerns is provided by International Regimes Theory. For an application of this theory to studying how an indigenous group in Colombia is resisting encroachment of foreign oil corporations on their territory, see Wirpsa (2004). Also relevant to this discussion is Relational Theory, the subject of the 2000 CIES Presidential Address by Ross. The role of education systems in preparing marginalized groups for democratic citizenship is a subject of the co-edited volume by Stevick and Levinson (2006).

[xx] This framework is based on one initially proposed by Paulston and Leroy (1980) to study nonformal education programs.

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