

# Explanation and Understanding in Comparative Education

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夫物有以同而不率遂同。辭之侔也，有所至而正。其然也，有所以然也；其然也同，其所以然不必同。

---墨子·小取篇

*Ἐπεὶ δὲ ταύτην τὴν ἐπιστήμην ζητοῦμεν, τοῦτ' ἂν εἴη, σκεπτόμενον, ἢ περὶ ποίας αἰτίας καὶ περὶ ποίας ἀρχῶν ἐπιστήμη σοφία ἐστίν.*

---Aristotle

Das Wesen des Vergleichens setzt die Ungebundenheit der erkennenden Subjektivität, die über das eine wie das andere verfügt, bereits voraus.

---H. -G. Gadamer

## I. INTRODUCTION

In response to the question whether it was possible to know about things ten generations from now, Confucius said: "Yin succeeded to the Hsia rites, and it can be known what changes were made. Chou succeeded to the Yin, and it can be known what changes were made. If there are any successors to the Chou, even one hundred generations hence, it is possible by analogy to know their characteristics" (Confucius, 2-23). Social and Cultural systems possess, it seems to Confucius, historical unity though undergoing continuous transformation. Comparison of the systems in different epochs can overcome the chance limits set by one's own range of experience and to "rise to truths of greater universality", as W. Dilthey would say. (cit. in H. -G. Gadamer, 1975, p.206).

The essence of comparison, as H. -G. Gadamer (ibid.) maintains, presupposes the freedom of the knowing subjectivity, which is in control of both members of the comparison. However, comparison as mental operation implicit in all aspects of man's everyday experience has to, as J. Schriewer(1988, p.31) correctly points out, be differentiated from the elaboration of comparative thinking into a social-scientific method. The scientific comparative method aims not only to the gaining of relationship knowledge, but esp. to the establishment of law-like theoretical statement to explain and predict phenomena. The major problems of comparative inquiry, as A. Przeworski & H. Teune(1970, p.13) claim, are "to introduce systemic factors into general, theoretical statements and to retain the systemic context of measurement statements."

One of the most questionable points in comparative education is whether it is possible to set up nomological statements to explain and to predict the educational development. Education, as social and cultural phenomenon, is tied to a particular time and place. Educational system is supposed to be designed for helping younger generations actualize their values and ideals. The design of educational system should take the contextual meaning and the time perspective

into serious considerations. Modern positivists in comparative education attempt to use cross-national data to discover invariant relationships between education and aspects of society to, as Erwin H. Epstein (1988, pp.4-5) said referring to C. A. Anderson, "throw light on process abstracted from time and even apart from conceptions of (evolutionary) stages (C. A. Anderson, 1961, p.29). However, the propositions or laws tested by the induced cross-national data mirror nothing but past educational and social events. How can these propositions or laws be utilized to project educational future? (Shen-Keng Yang, 1991, p.25) Furthermore, it should be strongly doubted whether the method of comparison really satisfies the idea of historical knowledge, as H. -G. Gadamer (1975, p.206) would say, and the idea of a universal educational knowledge in this connection.

Obviously, situations related to the formulation and to the use of social and educational laws, if given any, should be carefully investigated in order to avoid their abuses. New forms of ways of knowing, as Vandra Masemann (1990, pp. 470-471) correctly observes, flourish in a postindustrial era in opposition to logic-positivistic modes of thinking in industrialized societies. New paradigms in comparative education are characterized as holistic, context dependent, and integrative. Thus the integration of interpretative understanding into nomological explanation seems to be a possible solution to the methodological debates between the positivism and the antipositivism in comparative education. This paper attempts to address itself to this crucial methodological issue in comparative education through historical analyses of the disputations between comparative positivism and antipositivism, as well as of the controversies of understanding and explanation generally in social sciences.

## II. THE TRADITIONS OF COMPARATIVE EDUCATION AND THEIR CHALLENGES

The view that the methodology developed in the natural science is appli-

cable to the study of social events and processes is, as Elliot G. Mishler (1979, p. 3) points out, usually referred to as positivism. The analogy of human and social studies to physical science can be traced to J. S. Mill's (1843, p.852) claim: "The backward state of the (psychological) sciences can only be remediated by applying to them the methods of physical science, duly extended and generalized." The study of social phenomena is likewise subject to fixed laws. However, J. S. Mill admitted: " There is, indeed no hope that these laws, though our knowledge of them were as certain and as complete as it is in astronomy, would enable us to predict the history of society, like that of celestial appearances, for thousands of years to come" (ibid. p.877). But the difference of certainty is according to Mill not in the laws themselves, but in the data to which these laws are to be applied. In short, in social science, it is not so easy to reduce the complex causes to the simplified laws as in astronomy.

Criticizing the inadequacy of J. S. Mill's theory of causation, E. Durkheim proceeded to use comparative method to investigate the complicated social phenomenon based on the strict principle of causality:" To the same effect corresponds always the same cause" (E. Durkheim, 1895, p.127). Such a discourse on causality is the starting point of the contemporary comparative study of education. Early in 1817, Mare-Antoine Jullian, generally considered the "father of comparative education," claimed that the ultimate aim of comparative studies of education in different countries was "to deduce true principles and determine rules so that education be transformed into an almost positive science" (cit. in E. Epstein, 1988, p.3). Nomological knowledge of educational system is what the modern positivists in comparative education try to set up to explain and predict educational development. Explanatory model in education based on causality is experimentally tested similar to that in physical science. A comparative study, as H. J. Noah (1973, p.114) puts it, is essentially an attempt as far as possible to replace the names of systems (countries) by the names of concepts (variables)". The meaning of comparative studies might be better viewed in terms of

generalizations, explanations and predications where the time and space factors are incorporated as control variables into the generalization itself (E. A. Suchman, 1964, p.129). Nomological statement can be accordingly derived from the comparative studies wherein the proper names (countries) are transformed into variables.

The formulation of laws served to explain education constitutes, according to Le Thanh Khoi (1986, pp. 14-15), the main goal of comparative education. Without the development of the theories through generalized cross-system comparison, as R. L. Merritt & F. S. Coombs (1979, p.252) put it, "we won't explain much of anything, even within a single (national) system (of education)". G. Psacharopoulos (1990, p. 369) has even expressed uneasiness about the contents of the two major comparative education journals, *Comparative Education Review* and *Comparative Education* for that "the articles in two sample volumes of these journals are overly descriptive, in the sense that they provide long, nonquantitative accounts of the educational system of a single country." For Psacharopoulos, the goal to link the comparative education research and educational policy and planning can only be achieved through "conceptualization, methodological design, statistical sampling, rigorous data analysis, and hypothesis testing" (ibid., p.380).

Psacharopoulos' thesis represents one of typically empirical-analytic paradigms in educational science which (using the physical and biological sciences as ideal models) deems problems of procedural and statistical rigor of paramount importance. Educational theory is thought to be universal, not bound to any specific time and social context (Popkewitz, 1984, pp. 21, 36-40). Model of cause-effect is transformed to that of means-ends. Practice is narrowed to the technical know-how. "For the sake of practicality and concreteness", as R. G. Paulston's criticism of Psacharopoulos' thesis claims, interpretative and critical framing option along with ethical considerations are dismissed (R. G. Paulston, 1990, p.396). Such a positivistic theoretical model of education is based

supposedly on the absolute time-space continuum and the constancy of causality of classic physics.

However, absolute simultaneity is refuted by Einstein's theory of relativity: the spatio-temporal value of an event under measurement is dependent on the observer's conditions. Moreover, measurement of physical phenomena from the perspective of quantum mechanics is nothing but the result of the interactions between the researcher, the experimental instrument, and the experimental situations (Shen-Keng Yang, 1991, p.257). Under the challenges of the new developments in physical science the solid methodological foundation of positivistic comparative education is shaken severely. Today education, as Ed. King (1989, p.370) puts it, "prepares for uncertainty. So must educational research and planning, especially when we transcend locally conservative habits and resources, move into the unknown as well as the known realms of comparative study." M. A. Eckstein (1986) even reexamines his earlier positivistic position. In contrast to his earlier attempt to develop nomological statements" about the relationship between education and society and between teaching practice and learning outcomes" (H. A. Noah & M. A. Echstein, 1969, p.114), in his recent "Comparative Mind", Eckstein (1986, p.167) argues instead that educational researchers need to be more" critical, self-conscious and creative about the images, metaphors, and paradigms that we employ in our comparisons."

Challenges to positivistic position of comparative education come from, as E. H. Epstein (1988, pp. 3-23) maintains, cultural relativism, especially from phenomenological approach. Various attempts to synthesis, such as the case study approach, the morphogenetic approach, and Holme's eclectic problem-solving approach, fail to meet the positivist standards for a nomothetic research base on which we compare educational systems and educational practice. Until a synthesis between positivism and relativism, varieties of meaning of "comparison" should be, according to Epstein, accepted as governing Comparative Education (ibid. p.23).

Advocating pluralism in ways of knowing, V. Masemann tries to integrate the critical theory with the ethnography in the study of comparative education. Masemann argues that ethnography will provide an understanding of the culture and the symbolic life of the actors. Critical theory will suggest how alienated communication and socialization-control knowledge and rationality reproduce the social relations of reproduction. Human subjectivity can be studied using both ethnography and ideological lens of critical theory approaches (V. Masemann, 1986). Furthermore, in her presidential address to the 1990 Comparative and International Education Society annual meeting, Masemann (1990, p.472) argues that "Studies of comparative education can no longer detail the extent to which industrial, fragmentary forms of knowledge have 'taken hold' in non-Western countries. Studies of school effects need a more grounded, realistic methodology to assess general, qualitative impact rather than a fragmentary quantitative one."

The wide gulf between qualitative and quantitative work constitutes, as Charles C. Ragin (1987, p.2) observes, one of the most distinctive aspects of comparative social science. The recent methodological debates in comparative education coincide with such a split. However, is there any way to link the quantitative and qualitative gap in comparative education? The solution to this problem requires, as Raivola (1986, p.264) suggests, that we develop suitable theories "to serve as a basis for the comparison of cultures, such that (they) would combat relativism and historicism but would nevertheless gradually cover the particular socio-cultural properties of each object of comparison." In order to achieve this goal, a careful examination of the controversy between explanation and understanding in social sciences is essential.

### III.THE CONTROVERSY BETWEEN EXPLANATION AND UNDERSTANDING AND ITS IMPLICATIONS FOR COMPARATIVE EDUCATION

The notion of *Verstehen* was originally introduced into the methodology of the historical and social sciences by the German historian Johann Gustav Droysen. In his *Grundrisse der Historik* (1858), Droysen proposed three possible scientific methods according to the object and the nature of human thought: the speculative (formulated in philosophy and theology), the mathematical or physical and the historical. Their respective essences are to know, to explain and to understand. This is the first time, as K.-O. Apel (1984, p.1) observes, the distinction between explanation and understanding is used to ground the historical sciences methodologically and to distinguish them from the natural sciences.

The problem of developing legitimate knowledge specific to practical life in contrast to instrumental and nomological knowledge has been the central concern of the *Verstehen* tradition. It was W. Dilthey who started making the dichotomy between understanding and explanation the terminological foundation for distinguishing between natural sciences and *Geisteswissenschaften* in opposition to J. S. Mill's integration of the "moral sciences" (*Geisteswissenschaften*) into the unified science of nomological explanation. In Dilthey's thinking, as H.-G. Gadamer (1975, p.208) observes, there is no merely extrinsic accommodation of the method of the human sciences to the procedure of the natural sciences, but rather he sees in them both a genuine community. The natural sciences have as their objects facts which enter into consciousness as if from outside, and are given as phenomena and individuals. In contrast, the objects of the human sciences originally enter consciousness from inside, as reality and as a living relation. Thus in natural sciences a causal connection is added to the given through the construction of hypothesis. In the human sciences, the experienced connectedness of psychic life is the firm foundation on which we understand human life, history and all the depths and precipices of mankind (W. Dilthey, 1894, pp. 1314-1376). The possibility of the science of pedagogy (*die Wissenschaft der Padagogik*) can only begin with the description of the education in their relationship to the children. The fundamental sentence of peda-



gogy is that the psychic life has an inner efficacy, thus one perfection for himself. Consequently, it is possible to design the rules to produce the perfection through education. This can be proved by the analysis of psychic life without any necessity to appeal to metaphysical presupposition. Experience itself is enough to reveal it. In this connection, the use of comparative methods is to overcome the chance limits set by one's own range of experience and to rise to truths of greater universality.

The dichotomy of explanation and understanding was rejected by Carl Hempel who advocated a unified scientific methodology in applying his deductive-nomological model to social scientific explanation. Empathetic understanding is for Hempel nothing but a pre-scientific psychological operation. In his classic article "The Function of General Laws in History," Hempel (1965) argues that the possibility of objectivity depends not on empathy but rather on application of a rational scientific methodology. An adequate explanation of an act or an event is made possible if and only if the description of it followed deductively a set of universal lawlike hypotheses, together with a set of statements specifying their initial conditions. The lawlike hypotheses are subject to empirical confirmation or refutation. In social sciences the lawlike statements are, as A. Przeworski & H. Teune (1970, p.25) maintain, possible if and only if spatiotemoral parameters are treated as residua of veribables potentially contributing to the explanation. In comparative studies the proper names of social systems must be replaced by the relevant variables in order to build and test explanatory theory. In his analysis of curriculum change, B. Holmes (1958, p.373) suggests: "For those who wish to study the mechanics of curriculum development the importance of studying modern opinions on the main characteristics of scientific laws is thus obvious." Model of investigation for the social science must be identical with, and derived from, the form used in the studies of physical sciences. To draw lessons to educational planning from comparative studies, G. Psacharopoulos (1990) advocates rigorous quantitative hypothesis testing.

However, it is strongly questioned if the laws in social life can be identified with those in natural sciences and thus can be tested statistically. In his recent article "Causality, Determinism and Comparative Education as a Social Science", Holmes (1990) has adopted an intermediate social determinist position "in the belief that while men and women are free to make choices and can do so rationally, not everything happens by chance and we are not able to dismiss the unexpected and unwanted consequences of our actions simply because we do not like them" (p. 121). Intentional explication and causal explanation should be converged upon the studies of human actions.

The neo-Wittgensteinians propose thus two kinds of language games to deny the positivistic reductionistic thesis which involves the supposition that intentions as goals, and assessments of the situation related to these intentions can be considered volitional-cognitive complexes within Hempel's Deductive-Nomological model causal explanation. For the neo-Wittgensteinians one language game deals strictly with the observable events, their causes and regularities or laws that hold without exception. The other language game accounts for human actions as well as the meanings, intentions, reasons, aims or goals that are bound up with them and the rules, norms, or maxims to which they refer. Methodologically this dichotomy of language game can be considered as the reconstruction of the controversy between understanding and explanation developed in late nineteenth century. Starting from such a dichotomy of language game, G. H. von Wright (1971) proceeds a step further to reconstruct Aristotelian and Galilean traditions of theory of science and thus to build a new theory of causality and teleological explanation in the social sciences. For von Wright (1971, p. 132), a teleological explanation of action is normally preceded by an act of intentionalist understanding of some behavioral data. However, understanding what something is in the sense of *is like* should not be confused with understanding what something is in the sense of *means, signifies*. The first is according to von Wright a characteristic preliminary of causal and the second of teleological explanation (ibid. p. 135). Causal explanation involves therefore

human capacity to actively produce or hinder effects by intervening in natural process.

G. H. von Wright's Analysis provides K.-O. Apel a clue to the "transcendental-pragmatic" conditions of the possibility of causal explanation. According to Apel, the capacity to manipulate and direct natural chains of events forms the transcendental ground of causal explanation inasmuch as it provides the foundation for our understanding of the connection between events.

Based on the transcendental-pragmatic perspective, K.-O. Apel tries to expand the epistemological foundation of the theory of science to resolve the controversy between explanation and understanding. The ideal-typical connections between cognitive interests, language games and forms of ongoing practice can be considered the transcendental-pragmatic conditions of the constitution of the world of experience. The conditions of possibility of causal explanation in general include the concept of freedom of action. It follows that action cannot be universally reduced to an observable event with a causal determination without destroying the meaning of causal necessity itself. Hence, an interpretative study of action in terms of intelligible reasons must be a legitimate concern of science.

From transcendental-pragmatic perspective, Apel advocates further a "complementarity thesis." The explanation of events in causal terms and the understanding of the meaning of actions in terms of cultural norms and subjective intentions supplement and exclude each other. In a research community the most important point is that there is no clear-cut separation of cognitive subject and cognitive object. In the social sciences all the studied objects and different research-orientation must be considered as Co-Subjects participating together in the process of the constitution of knowledge. Self-reflection plays a very important role in such a cooperative process of knowledge-formation. It is through self-reflection that the norms, values and self-interpretations of the tradition cannot be accepted at face values; they can be explained in terms of social and historical conditions affecting them.

In comparative education, the problem of the mediation of knowledge and action, the utility of objective and subjective knowledge traditions in reflective interaction with practice has recently been the forms of methodological discussions. Challenges to the established research tradition are seen in critiques of nation-state studies, of quantification and system models, of structural-functionalism and in those advocating new subjects of inquiry. Some new currents in comparative education embrace, as A. R. Welch (1991, p. 508) observes, a far more socially critical conception and far less dominated by natural scientific definitions of knowledge. In response to the new challenges, methodological combination of explanation and understanding, as K.-O. Apel would advocate, seems to be an appropriate way to serve to study education in another society or culture without the necessity to suspend the norms and values of a researcher's own cultural tradition. Through the active participation of the co-subjects of the research concerned into the negotiation in the process of knowledge-formation, the comparative knowledge is easily legitimated and put into practice.

#### IV. TOWARDS EPISTEMOLOGICAL PLURALISM IN COMPARATIVE EDUCATION

In his *Interpretation of Tao*, Han Fei Tzu (d. 233 B.C.) said: "Tao is that by which all things become what there are. It is what with which all principles are commensurable. Principles are patterns (wen) according to which all things come into being, and Tao is the cause of their being. Therefore it is said that Tao puts things in order (li). Things have their respective principles and cannot interfere with each other; therefore, principles are controlling factors in things. Everything has its own principle different from that of others, and Tao is commensurate with all of them." From this passage it would be supposedly followed that were Han Fei Tzu a comparativist in education, he would try to search for a universal explanation theory (Tao) to explicate the genesis and becoming of educational systems in various social and cultural traditions. This is what the

positivists in comparative education attempt to do .

However, the existence of a universal commensurable law confronts severe challenges even in the physical sciences, especially under the influences of the theory of relativity and of quantum physics. Even if there exists a universal principle, various persons will have quite different understanding of it. This point has already been asserted by an ancient Greek philosopher, Heraclitus ,when he said:" Though the Logos is universal, the majority live as if they had understanding peculiar to themselves" (H. Diels & W. Kranz, 22. Heraclitus B 1). In comparative education it is important, as H. N. Weiler (1979, p. 13) notes, to study and examine the processes and outcomes of theory formation under different national conditions. For social and cultural contents change, so does the peculiar understanding of education grounded in them. The alternative "meaning" implicit in the shifts of cultural and social changes should be, as Ed. King (1989, p.372) remarks, taken into meticulous consideration in the comparative studies of education.

Since "the shape of knowledge changed as the basis for knowledge claims changed" (V. Masemann, 1990, p. 469), is there any need to formulate a generalized theory in comparative education? The desire to search for certainty in an ever-changing world seems to be universal to all the humankind. The building of explanatory theory to make the changing world understandable is supposed to be an effort to meet this desire. So does it happen in comparative education. In order to grasp the general trends in educational development the formulation of general nomothetic statements of education seems essential. However, the primary function of comparative inquiry lies, as A. A.Przeworski and H. Teune (1970, p.13) observe, in the following position: whenever there is a system specific factor that seems to be necessary for explanation, the conclusion should not be that systems are unique but rather that it is necessary to identify some general factors so far not considered. Explanation should therefore also not be unique. It changes with the continuous transformation of explanatory context.

It should be noted, moreover, that human knowledge possesses dynamic multi-dimensional deep structure. The core of the structure remains unchanged. The outer layer of the structure changes with times. Different approaches of knowing lead to the formation of various patterns of knowledge. Different patterns of knowledge seem externally to be contradictory to each other. In depth, however, they constitute complementarily the dynamic whole of knowledge. From such a perspective of dynamic epistemological pluralism, it seems easier to find a suitable solution to the recent methodological debates in comparative education. Perhaps there exist unchanged laws governing the educational development. Hypothesis-testing is thus necessary to set up nomological statements. However, meanings in educational operation are bound strictly to the historical and cultural context, wherein the education is going on. In this case, hermeneutic understanding is essential to expound the deep meaning rooted in the educational process. The cooperative integration of explanation and understanding will contribute accordingly to the constitution of a dynamic multidimensional comparative knowledge, which can, in Reijo Raivola's words (1986, p. 264), "serve as a basis for the comparison of cultures, such that (they) would combat relativism and historicism but would nevertheless gradually cover the particular socio-cultural properties of each object of comparison."

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# 比較教育中的說明與理解

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## 摘 要

比較研究，正如A. Przeworski所云，其旨不僅止於比較而已，也在於作因果說明，近代比較教育中的實証主義也試圖建立有關於教育現象之律則性的知識，以作為比較教育研究之依據。詮釋學與批判的俗民誌，則以因果說明的比較，根本喪失教育之深層意義，甚而有基於某種意識型態，而藉助於統一法則，故意曲解某些教育現象之可能。然則因果說明和意義理解是否完全不相容，則有待於從方法論層次，作更深層的分析。

本文先就人文與社會科學中，因果說明和意義理解之間的爭論作一個歷史性的回顧，進而就教育本質探討因果說明和意義理解在教育研究中的適用性與限制，最後歸結到人類知識建構是一個動態的深層結構，有關於教育現象的知識也屬於整體動態知識結構之一環。就鉅觀層面而言，因果說明可藉以掌握教育現象之一般趨勢，就微觀層面而言，教育現象背後的深層意義，仍有待於理解，方能作恰如其分的把握。兩者並不互相排斥，而是構成了有關教育現象不同層面的知識均為解釋教育現象所不可或缺。

就比較教育觀點言，以動態深層結構的知識觀作出發，較易找到合理的比較基點，透過這個基點來對兩種教育現象或教育制度作比較，一方面可以避免陷入歷史主義和相對主義的謬誤，一方面在比較中也不會忽略比較對象所具有的特殊的社會文化特質。