Introduction

Developing a framework for comparative study of the diverse manifestations of open and distance learning is no easy task. Yet, as the global knowledge and distance education revolution quickens its scope and pace and policy-makers, government officials, and administrators search for meaningful role models to emulate, there is a corresponding need for such research to illuminate and guide the work of instructors, managers, policy makers and others associated with the open and distance learning enterprise. Application of comparative research method can benefit not only the operations being studied, but also the operations in other, even dissimilar, distance education settings. The knowledge thus generated can provide insights to policy-makers, government officials, and administrators seeking solutions to the immediate and long-term problems of tertiary and lifelong education. Comparative distance education research can contribute to the growing knowledge base of distance education as a dynamic field of study and analysis.

This paper presents a schema for conducting comparative research on open and distance learning phenomena. Central foci of this framework are four types of research: cross-national research, cross-cultural research, interdisciplinary research and cross-institutional research. As will be explained, common to each of these types of research is comparative analysis. Each of these terms is defined within a comprehensive research framework.

This paper is subdivided into eight sections. In the first section I begin by presenting definitions of four types of research that collectively comprise tools for conducting comparative distance education research. In the second section I present a cursory review of the international and distance education literature. In the third section I focus on the comparative method as this term has been developed in the field of comparative education, focussing on two ways in which comparisons may be made and alternative epistemological approaches that influence the purposes, procedures, and outcomes of comparative research; the scope of comparative research; and six stages of comparative distance education research. In the fourth section I list impediments that prevent more comparative distance education research from being done. In the fifth section I present a framework, based on systems thinking, for preparing case studies for subsequent comparative analysis. In the sixth section I list some benefits of conducting comparative distance education studies. In the seventh section, I suggest what steps may be taken to encourage more frequent use of the comparative method in distance education research. In the eighth and final section, I present a brief summary of the overall paper.

I. Definitions

Comparative distance education

What constitutes the comparative method applied to distance education (i.e., education that occurs when either or both spatial or temporal distance separates the instructor and the learner) is the central focus of this paper. Borrowing from the rich literature of comparative education, comparative distance education is defined as the interdisciplinary study of two or more sets of distance education phenomena that occur
in more than one cross-national, cross-cultural, and cross-institutional setting. In addition to the study of similarities and differences between sets of distance education phenomena, comparative distance education seeks to explain the phenomena studied by examining their patterns of relationships with the various facets and factors that arise in those settings. Thus comparative distance education involves comparisons across national, cultural, institutional, and disciplinary contexts. These different contexts call for the following comparative research approaches:

**Cross-national research**

In making comparisons of distance education practices in two or more countries, different aspects of distance education and/or its contexts constitute points of comparison. Researchers may choose to examine distance education as it either affects or is affected by conditions that arise from the national context. When the research involves more than one country, such research may be referred to as cross-national research.

**Cross-cultural research**

Patterned ways in which people who belong to the same society think, perceive and express their values constitute differential contexts for distance education phenomena. Distinctive contexts may not only vary from country to country but often also within countries. When the research involves more than one cultural context, such research may be referred to as cross-cultural research. Studies that involve cross-cultural comparisons may be conducted either within a single country or two or more countries.

**Cross-institutional research**

When researchers study distance education programs or practices, they often study the institutional contexts within which they occur. When data are gathered from more than one institution, it may be referred to as cross-institutional research. Such research may be conducted either within a single country or more than one country.

**Interdisciplinary research**

To comprehend the often multidimensional and complex distance education phenomena, distance education researchers will need to draw on the bodies of knowledge and ways of knowing of more than one discipline. With their distinctive and often overlapping theoretical perspectives and research methods, the social sciences can contribute differential insights not only about the distance education phenomena, but also about how such phenomena may be studied. When research involves collection, analysis, and reporting of data within the perspectives of more than one discipline, it may be referred to as interdisciplinary research. Convergence of such perspectives in a particular study may be regarded as yet another expression of the comparative method.

What these four research approaches have in common is that they may each be employed in conducting comparative distance education research. With the exception of cross-national research, each approach may be utilized in comparing distance education phenomena in a single country. Still, the principal focus of the type of comparative distance education research described in this paper is the study of distance education phenomena and the interrelationships between these and other facets and factors within cross-national, cross-cultural, and cross-institutional settings.

Two additional related terms are relevant to this discussion of comparative distance education: *international distance education* and *international distance education research*.

**International distance education**

The observation by Blight, Davis, and Olsen (1999, p. 15) that “Open learning and distance education are borderless in concept” brings us to *international distance education*, a term that can be assigned two meanings:
1. One meaning refers to a type of distance education practice:

   *International distance education* refers to distance education phenomena and practices that occur in more than one country.

Information about such practices is commonly shared with distance educators who attend international conferences and who read published reports. It is noteworthy that all of the major distance education journals -- *Distance Education* (Australia), *Journal of Distance Education* (Canada), *American Journal of Distance Education* (U.S.A.), *Open Learning* (U.K.), and *Revista Iberoamericana de Educación a Distancia* (Spain) -- have subscribers beyond the borders of the countries in which they are published and feature in varying degrees of frequency reports on distance education practices in other countries. To the extent the articles published in these journals describe distance education phenomena, circumstances, or events in countries other than the ones in which the journals originate, they may be characterized as reports of international distance education.

2. A second meaning focuses on the geographical distribution of distance education practices:

   *International distance education* refers to distance education phenomena and practices that transcend or cross over national boundaries.

Distance education practices developed in one country have been disseminated to other countries. Courses and programs offered by distance education institutions are now accessed by learners worldwide and are thus ipso facto *international*; nevertheless, the extent to which the designers and deliverers of such programs consciously take into account the implications of their international outreach may vary considerably. One example of a program of graduate study intentionally designed to serve as an international distance education program is the American School of Business-Instituto Tecnológico de Monterrey joint master’s program in international business for business executives throughout Mexico and elsewhere in Latin America. Athabasca University’s executive master of business administration (MBA) program is an example of a typical international distance education program not specifically designed as an international distance education program but which nevertheless serves not only one of every four MBA students in Canada but also a growing number of managers from Latin America, Asia, and Europe. A much more impressive record of international distance education programming is the Open University-UK that in 1998 served 25,000 students in ninety-four countries and used four hundred examination centres (Daniel, 1998, cited in Blight, Davis, and Olsen, 1999, p. 20).

**International distance education research**

Building on these previous two definitions, we can now define *international distance education research*:

   *International distance education research* refers to the systematic collection, analysis, and/or reporting of data on distance education phenomena, circumstances, events, or practices that occur in one or more foreign country (*foreign* from the point of view of the person(s) reading the report).

Few distance education researchers collect data in more than one country. However, there are abundant examples of research reported by researchers in countries other than their own. Numerous researchers avail themselves of the opportunities to present their research conducted in their own countries on distance education phenomena in such international venues as the International Council for Distance Education conferences, held once every two years, and at this University of Hong Kong-sponsored Conference on Research in Distance and Adult Learning in Asia. Researchers and others can often glean fascinating and useful insights from reviewing International distance education research, even when such research is limited to the collection, analysis and reporting of data on a single institution. The usefulness of such research, however, can increase significantly with deployment of comparative research as defined above.
II. A cursory review of recent literature

To obtain a sense of the extent to which the mainstream distance education literature featured international or comparative distance education topics, I reviewed a non-random selection of recent issues of articles published in *The American Journal of Distance Education*, *Distance Education* and *Revista Iberoamericana de Educación a Distancia* as well as all of the articles published in 1998 in *Journal of Distance Education* and *Open Learning*. Articles relating to international distance education were then examined further to determine if they fit the descriptions of cross-national, cross-cultural, and cross-institutional and/or interdisciplinary. In all but the *American Journal of Distance Education* that as a matter of policy restricts the geographical focus of its articles to North America, none of the articles about international distance education topics drew on any form of comparison. In other words, none of the international distance education articles involved cross-national, cross-cultural, interdisciplinary, or cross-institutional comparisons.

I then turned to the papers that were presented at the 1997 and 1999 world conferences of the International Council for Distance Education. I paid particular attention to those that involved cross-national, cross-cultural, interdisciplinary, or cross-institutional comparisons. Again, I found few instances of comparative distance education research.

Four recent book contributions to the distance education literature that are examples more of international distance education than comparative distance education, are Daniel’s (1996) *Mega-universities and knowledge media: Technology strategies for higher education*, Harry’s (1999) edited *Higher education through open and distance learning: World review of distance education and open learning: Volume I*, Farrell’s (1999) edited work, *The development of virtual education: A global perspective*; and Perraton’s (2000) *Open and distance learning in the developing world*. Although none of these works are explicit applications of the comparative method, all three incorporate some degree of comparison. Daniel compares the characteristics of 11 mega-universities around the world that offer open and distance learning opportunities to hundreds of thousands of students in their respective societies. Although Harry’s edited collection contains chapters on different distance education topics of international concern, in the initial chapter, Harry and Perraton (1999) compare and contrast instances to show how different countries respond differently to various issues of universal concern. In his book, Perraton (2000) synthesizes and critically analyzes the distance education experiences in the developing countries. Details of both success and failure of distance education generated in different national contexts are compared for each of the issues that constitute the focus of each of the 10 chapters. Together these books exemplify the utility of comparative presentation and analysis. In most of the 11 chapters in Farrell’s book, a number of authors present inter-institutional comparisons of major distance education institutions in various parts of the world.

The importance of making culture an object of comparative study is suggested by this explanation by Harry and Perraton (1999) of the problem of delivering distance education across different cultures.

> Materials and courses, offered through the new technologies, are culture-laden. While new networks of information may widen access to education, they can also threaten the indigenous institutions of higher education, which have grown in strength, stature, and service to their host communities over the last quarter-century. It would be ironical if technology, that could provide educational resources not otherwise available to them, were at the same time to weaken the independence and local relevance of the remoter institutions of the south, and the cultures that sustain them. (p. 5)

The focus of Kwon and Danaher’s (1999) intercultural study was the “cultural diversities” among open and distance education programs in Korea and Australia. They conducted an intensive examination of the cultural diversities underpinning open and distance learning provision at specific higher education sites in those two countries. Their comparative analysis exemplifies the use of both tabular and textual juxtaposition (explained below).
Examples of recent research that was both cross-national and cross-cultural are Kinyanjui (1997) and Thomas’ (1997) surveys of tertiary distance education institutions and programs in Sub-Saharan Africa. In their secondary analysis of these studies, Roberts and Associates (1998) compared 66 institutions in anglophone African countries, 67 in francophone countries, and 10 in lusophone countries. Comparisons were drawn on the basis of objectives, target audiences, learner support, subject areas, institutional structures, human resources, technologies, finances, policies, convergence of distance and classroom learning, collaborations and partnerships. Roberts and Associates reported that across the region distance learning is recognized as integral to overall national education strategy; credentials earned in distance education institutions are now gaining acceptance as credentials equivalent to those earned in conventional education. In the same study Roberts and Associates also ventured some cross-cultural comparisons among the anglophone, francophone, and lusophone countries. They noted, for instance, that in anglophone countries

Distance learning is more visible, institutions are more independent, distance learning’s stakeholders are more actively and decisively committed to distance learning thanks to the synergy provided by professional associations. In the francophone countries, there were no such national distance education associations. At the same time, francophone countries were more likely to use modern informational technologies than anglophone countries.

It would be interesting to investigate possible linkages between other differences in distance education programs and the characteristics of different cultures. Victoria, Semion, and Svetlana (1999) who reported difficulties that can occur when inter-cultural differences are not taken into account attest that such research may turn up noteworthy findings. When the Open University of Israel offered courses to 17,000 students in Russia, they were not aware until their study was conducted, that a major reason for learners dropping out of the courses was “cross-cultural misinterpretation of teaching material” arising from “substantial and semantic disparities.” This discovery led the researchers to question the cultural assumptions of course developers when offering courses to students in other cultures.

Admittedly, this review of the incidence of comparative distance education research in the distance education literature is neither comprehensive nor exhaustive. Nevertheless, the findings are suggestive of the same conclusions reached by Akl-Bittar (1999) who, with respect to distance education research in Latin America, observed:

I find a limited and fragile theoretical development and an abundance of information, but empirical research is a very small part of this profuse literature. Likewise, in the Latin American distance education universities, the development of a theoretical base proper to the cultures and the idiosyncrasies of our societies is practically nonexistent. In addition, empirical research is of a questionable quality, generally disperse, refers to non-representative populations and is either not integrated nor does it reflect the presence of a systematic process of accumulation of knowledge. A large part of the research done has not gone beyond the descriptive level, and in many cases has not even come up to this level, but rather refers to how reality ‘ought to be’ or leaves us with a non-critical, unsystematic description of how a particular function or process in the institutions was arrived at, thus, providing us with little or no basis for going beyond a narrative report.

A more systematic and thorough review of the mainstream journals and other major international distance education conferences would provide a sounder basis for reporting with greater accuracy and confidence about the relative incidence of comparative research in the distance education literature. To determine the extent to which the comparative method is present in other parts of the distance education research literature, it would also be desirable to extend the review to monographs and books. Such a review would probably highlight the need for more comparative distance education research and set the stage for further work. In looking to increase this kind of research, researchers can benefit from the concepts and tools for comparative work that have been developed in the field of comparative education.
III. Contributions from the field of comparative education

Because the topic of comparative research method has yet to be broached in the distance education literature, it may be useful to examine the comparative education literature for insights concerning the utility and merits of the comparative method. To understand the merits of this method, we now turn to the field of study known as comparative education. In this section I review the suggestions of Bereday (1969) regarding presentation of comparative data, Epstein (1988) on epistemological orientations, Olivera (1988) on a conceptualization of the science of comparative education research; and an extrapolation to comparative distance education of the work of Noah and Eckstein (1969) regarding different stages in the development of comparative education research.

Bereday: Presentation of comparative data

Bereday (1969) offered two steps whereby analysis of educational phenomena may be presented: juxtaposition and comparison. Each of these steps may be divided, respectively, into tabular and textual juxtaposition and into balanced and illustrative comparisons. Each of these will now be presented in turn.

Juxtaposition. Bereday (1969) refers to juxtaposition as a preliminary step to order material for subsequent comparative analysis. He refers to it as a way to identify “systematic variations which permit the construction of typologies which, if regular, are in themselves laws” (p. 6). Tabular juxtaposition enables us to determine the extent to which data are comparable. A statement of the preliminary basis for comparison precedes the table containing information from two or more countries. Systematic examination of the tabular information may then be examined to inform a final hypothesis for comparison that follows the table. From a study of copyright functions of distance education institutions conducted by Cookson and Claerhout (in process), Table 2 provides an example of tabular juxtaposition that approximates this method of tabular juxtaposition.

Table 1. Most pressing copyright issues faced by the distance education institutions. (Institutional copyright officers’ responses to the question, “In your view, what are the three most pressing issues related to copyright facing your institution?”)

<table>
<thead>
<tr>
<th>Alhambra University</th>
<th>CIRJ Open College</th>
<th>Deakin University</th>
<th>FernUniversität</th>
<th>International Extension College</th>
<th>NKI Fjernundervisningsinstituttet</th>
<th>Open Learning Agency</th>
<th>Open University UK</th>
<th>Teleuniversité-Québec</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Tracking of clearances, information gathering and dispensing</td>
<td>1. Time consuming to update the log</td>
<td>1. Rising costs</td>
<td>1. Continuous information for creator/author etc.</td>
<td>1. Copyright on the Internet</td>
<td>1. On-line libraries and standard licensing from publishers</td>
<td>1. Update our processes for interactive multimedia interactive</td>
<td>1. Adjust our methods to the new ways from the editor (authorization more limited than before in number of copies and in time)</td>
<td></td>
</tr>
<tr>
<td>2. Information dispersing</td>
<td>2. Cost of copying</td>
<td>2. Related partly to growing knowledge and co-operative ownership of copyright and their collecting agencies</td>
<td>2. Copyright guidelines</td>
<td>2. Volume of clearances generated by new and emerging technologies</td>
<td>2. Volume of clearances generated by new and emerging technologies</td>
<td>2. Adjust our methods to the new ways from the editor (authorization more limited than before in number of copies and in time)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Needing full-time assistance.</td>
<td>3. Rising costs</td>
<td>3. Digital use of material not yet covered by statutory licence (affects planned electronic reserve in the library and placement of materials online)</td>
<td>3. Establishing rights agreements with contribut&quot;ors regarding digital broadcast</td>
<td>3. Establishing rights agreements with contributors regarding digital broadcast</td>
<td>3. Establishing rights agreements with contributors regarding digital broadcast</td>
<td>3. Adjust our methods to the new ways from the editor (authorization more limited than before in number of copies and in time)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Textual (or vertical) juxtaposition, on the other hand consists of a verbal description of categorized data. Following an explanation of the “preliminary basis of comparison,” observations for each country are presented in turn. Following the presentation of data, the researcher adds a “hypothesis for comparison.”

Comparison. Bereday’s second step, follows juxtaposition and can be subdivided into balanced comparison and illustrative comparison. Bereday (1969, p. 9) explains that balanced comparison calls for “symmetric shuttling back and forth between the areas under study.” He adds, “The essence of this
method is that every type of information from one country must be matched, 'balanced,' by comparable
information from other countries” (p. 9). When information from each country is presented in consecutive
paragraphs, it is called “balanced rotation”; when information from countries becomes part of a merged
simultaneous discussion of compared elements, it is called “balanced through fusion” (p. 10).

In the preface to his book Mega-universities and knowledge media, Daniel (1996) refers to the balanced
comparison of the experiences of 11 mega-universities he describes in Chapter 3: “These 11 mega-
universities teach at a distance and serve nearly three million students. I identify their common features
and review the challenges they now face” (p. 2).

An example of illustrative comparison may be drawn from Knox's (1993) comparisons of the various uses
of technology in national systems of distance education:

The diversity and physical separation of distance education participants from provider staff make
strategic planning crucial if programs are to be responsive. It is especially important in countries with
sparsely populated areas, such as Canada, Australia, Sweden, Norway, and the former Soviet Union.
Attention to access has been evident over the years, but there has been less focus on equity and
impact. . . . Television was used in NTU, China and Sweden. It became less central as UKOU was
implemented. Radio was not so extensively employed in Germany, and a low-tech approach was
used in AU. In Oklahoma, many forms of technology were used. . . . The combination of exams and
self-directed learning was central in the examples from New York, DANTES, and China. In Ghana,
government ideology helped to terminate the program. (pp. 174-175)

When data are too imprecise or insufficient for balanced comparison to be possible, Bereday
recommends a second form of simultaneous comparison that he calls illustrative comparison. Following
this "inferior" but sometimes useful method, the researcher points to educational practices in different
countries at random as “illustrations of comparative points suggested by the data” (p. 13).

Educational practices in different countries are drawn at random as illustrations of comparative points
suggested by the data. . . . No generalizations are possible, hence no laws can be arrived at or
deducted . . . The analysis is derived from comparative data only by implication. (Bereday, 1969, p.
13)

These two methods, juxtaposition and comparison, suggest a structure for distance education
researchers when analyzing their data from more than one country. Such systematization can provide a
basis for increasing the rigor of their analyses and thus makes their findings for other researchers and
practitioners more intelligible, insightful, and useful.

Epstein: Epistemological orientations

The steps for presentation of comparisons forwarded by Bereday are a reflection of the epistemological
orientation of positivism. Epstein (1983 and 1988) clarified the distinctiveness of positivism from two
contrasting epistemological orientations, all of which have important implications for the conduct of
comparative research:

1. **Positivism.** Comparativists who articulate a positivist orientation draw on cross-national methods of
in-depth study of educational phenomena in order to formulate nomothetic explanations of "invariant
relationships between education and aspects of society " (Epstein, 1988, p. 4) and of "underlying
trends and patterns that account for whole classes of actions or events" (p. 7). The aim of such
studies is to formulate generalizations of phenomena that transcend national boundaries. In such an
approach

only empirical statements about education are scientific and only scientific statements are
meaningful. That is, for a proposition to be meaningful it must be testable or verifiable in
principle, and for it to be regarded as true it must be subjected to an experiential test. (p. 5)
2. **Cultural Relativism.** Those who subscribe to cultural relativism focus on idiographic explanations of educational phenomena surrounded by unique sets of circumstances governed by norms and values relative to specific cultural contexts. . . . Because the focus can not go beyond particularities of any given situation, neither comparison nor generalization is possible. Education in different countries is studied in order to understand how it relates to its particular cultural environment.

3. **Phenomenology.** Those who subscribe to a phenomenological orientation reject the positivist assumption of an empirical social world constructed essentially of a preconstituted field of objects awaiting explication and whose existence is independent of the processes through which it is studied and understood. Rather, it views as problematic the very availability of the world for analysis. . . . Suffice it to say that no technique that objectifies observations can stand up to the test of phenomenology. (p. 12)

Thus for phenomenologists comparison consists of interpretation of phenomena in terms of the "highly idiosyncratic interactions [that attend the phenomena] within severely limited contextual boundaries" (Epstein, 1988, p. 16).

According to Epstein, these three incompatible epistemological orientations offer very different definitions of comparison. While it is important to recognize their inherent incompatibility, it is still possible for researchers to maintain sensitivity to all three approaches. In examining the reports of international distance education research presented at the two most recent International Council for Distance Education conferences, as well as those that have been published in the mainstream distance education journals, the positivist orientation is marked by its absence. What we see so often is presentation of information on single instances of specific distance education settings, surrounded by "unique sets of circumstances" or in terms of the unique experiences or perceptions of the significant actors in a particular setting. In either case, generalization is problematic. If we were to go to some of the books and monographs, we find a similar pattern. Even when the title suggests a comprehensive perspective based on synthesis and comparative analysis, we find instead collections of individual reports reflecting either a culturally relativist or phenomenological orientation with usually limited attempt on the part of the compiler or editor of the collections to draw systematic comparisons of the individual cases.

**Olivera: Scope of comparative education studies**

Olivera (1988) articulated the difference between education science (which he called educology) and comparative education. The former consists of all of the concepts, methods, and techniques of the human sciences that enable study of educational situations. In a systems framework, situations to be investigated include demands, inputs and conditioning of the social system and subsystems. The educational process includes intrinsic factors of goals, system, actors, and means and the external or social factors. The intended and unintended outputs, manifest as effects on social systems, are also studied. Going beyond these first level analyses, comparative education "identifies the relationships between the factors and components of such situations" (Olivera, 1989, p. 217). Thus, the object of comparative education is relationships among patterns of relationships observed in two or more groups. The relationships that comprise first level studies of distance education phenomena in specific settings constitute the raw material for more abstract, second level comparative analyses. Comparative education studies involve comparisons between either countries or of phenomena of international scope.

In light of Olivera's explanation, comparative distance education research can involve abstraction from two or more case studies in specific national, cultural and/or institutional settings. Few studies of specific distance education situations in other countries involve comparison but if case studies were to follow parallel structure for presentation and analysis, data from multiple case studies could be analyzed using juxtaposition and simultaneous comparison. Case studies could thus serve as the "raw material" of comparative distance education research. An example of a set of case studies that may form the bases for subsequent comparative distance education analyses will appear in the second issue of *The International Review of Research in Open and Distance Learning* planned for December 2000. The case
studies in this issue will recount the experience of distance education institutions in five countries that converted entire degree programs from print-based delivery to Internet delivery. Because the case studies will adhere to a uniform parallel structure (described later in this paper), it will be possible to conduct subsequent (second level) comparative analyses of the data presented.

Noah and Eckstein: Stages of Comparative Distance Education

According to Noah and Eckstein (1969), the development of comparative education has been marked by five distinct linear and historical stages. I have added a sixth stage, collaboration, to follow the third stage:

1. traveler’s tales
2. educational borrowing
3. international cooperation
4. international collaboration
5. factors and forces
6. social science explanation

Although these so-called stages have been criticized for lack of conceptual precision and nonmutual exclusivity (Epstein, 1983), they can still serve as a set of developmental orientations toward the field of comparative education. They may also enable us to categorize the contributions to the international distance education literature.

Stage 1: Travelers’ Tales. Although the documentary record is fragmentary, first- and second-hand, in-person means of dissemination of information about programs and practices of distance education in other countries have been manifest in three primary ways: (1) publications (journal articles, monographs, and books) containing descriptive analysis and narrative accounts of distance education programs and institutions; (2) “show and tell” presentations and symposia at national and international conferences by distance educators from different countries; and (3) visits to distance education institutions by distance educators in other countries.

Works at this stage, likely to be instances of international education more than comparative education, constitute the norm in the mainstream distance education journals. Most comparative distance education research tends to be descriptive, rarely analytical, and hardly ever comparative. Almost all of the presentations at the two most recent world conferences of the International Council for Distance Education were also at this stage. As establishment of 30 open and distance learning universities throughout the world attests, visits of academic and administrative personnel to distance education institutions in other countries can be productive in generating ideas for adopting new practices back home. Still, they seldom disseminate reports beyond the home institution.

Stage 2: Educational Borrowing. The history of distance education worldwide reveals widespread borrowing of innovations developed in one country and adopted and adapted in other countries. Correspondence study was an offshoot of the University Extension System established by Professor James Stewart at the University of Cambridge in 1872. Almost immediately this innovation was duplicated on the other side of the Atlantic by Anna Elliot Ticknor who established a correspondence system for women and William Rainey Harper who popularized correspondence instruction with university extension in the United States (Sherow and Wedemeyer, 1990). The University of Wisconsin originally pioneered the now widespread practice of delivering distance education via the medium of radio in the 1920s. A similar pattern of widespread global diffusion of educational television may be observed following initiation of the first university-owned educational television stations in the 1950s. Professor Charles Wedemeyer’s public lectures on both sides of the Atlantic concerning his Project AIM, “Articulated Instructional Media,” contributed to the planning for what became the Open University-UK, an institution that, as Harry and Perraton (1999, p. 19) developed into a national system that has been emulated with establishment of mega-universities (Daniel, 1996) and small open universities in at least 30 nations. Stimulated by worldwide circulation of mainstream distance education journals, books, conferences involving distance educators from different countries, international agency reports on
Stage 3: International Cooperation. This third stage of exchange among distance educators worldwide has been manifest in the joint involvement of distance educators in professional associations, various projects and activities. Such cooperation is often the product of joint involvement by two or more international governmental and nongovernmental organizations, educational institutions, and/or individuals. Contributions to the many activities of the International Council for Distance Education, including the biannual world conferences are made possible today because of the legacy of cooperation established by such pioneering distance education associations as the ICDE’s predecessor, the International Council for Correspondence Education (see Bunker, 1999).

Besides cooperatively sponsoring with other distance education organizations international conferences and international reports relating to various aspects of international distance education, the Commonwealth of Learning has secured funding for several years to establish and maintain the International Distance Learning Centre, a documentation centre that has provided worldwide access to documentation on distance education curriculum and research materials. More recently and with the technical cooperation of the International Distance Learning Centre, the World Bank established an extensive international distance education online collection of full text bibliographic resources.

Undoubtedly national government foreign aid agencies as well as such international agencies as the Organization of Economic Co-operation and Development and UNESCO have also contributed to different forms of international cooperation. MacKeogh’s (1999) account shows how extensive cooperative efforts on the part of European Union member nations have resulted in joint policies, open and distance learning networks, as well as European Union financing schemes to support distance education innovations. A valuable contribution to the literature would be a comparative analysis of the cooperative activities in different regions of the world.

Stage 4: International Collaboration. Although it encompasses the kinds of activities referred to in the previous stage as international cooperation, this fourth stage can manifest by more than shared participation in joint activities. Collaboration may be defined as a formal partnership between two or more organizations, accompanied by institutional commitment (See Moran and Mugridge, 1993, p. 1). A continuum of collaboration activities, from simple to more complex activities, may include: “exchanges of information, experience, and consultants; collaboration on development, adaptation, and evaluation of learning materials; establishment of credit-transfer arrangements; and creation of new management structures, both within and among institutions” (Moran and Mugridge, 1993, p. 3). Given the complexity of originating distance education programs in one country to other countries and cultures, the number of institutions discovering the advantages of joining and participating in international distance education collaborations is burgeoning. In the case of my own institution, Athabasca University’s has become one of the first non-US institutions to serve as a provider institution for the Western Governors University in the US; has entered a partnership to provide curriculum for some of the initial courses of the Open University-US; and is exploring membership in the Global University Alliance and Global Virtual Alliance. A fruitful area for comparative distance education research would be the comparative motivations and comparative perceptions of the benefits held by the various institutional members concerning these collaborative arrangements.

Stage 5: Forces and Factors. The emphasis of the fifth and sixth stages is on studies of aspects of international distance education phenomena as they are influenced by and in turn as they influence forces and factors in specific countries. Comparative studies designed to test hypotheses reflective of interdisciplinary theoretical perspectives could provide answers to practical problems while at the same time add to the store of knowledge unique to the field of distance education. Although reference is made in the literature to the forces and factors that influence distance education programs and practices, particularly the various manifestations of globalization and the growth of the Internet, most articles are based on personal observations based on anecdotal evidence. Seldom are data systematically gathered using scientifically rigorous and replicable methods. As a result, as has already been stated, much of the
writing in international distance education tends to be single case studies in specific national settings. Again, comparative analysis of such studies is rare.

**Stage 6: Social Science Explanation.** Perhaps because most research in distance education appears to be conducted by distance education practitioners, rather than social scientists, most works classified as either international or comparative distance education tend to rely on simple "show and tell" descriptions and common sense interpretation of events rather than on social science explanations. If studies were conducted to formulate or test theory, series of related studies in pursuit of "lines of research" would more likely be sustained. This was one of the points made by Evans (1989) when he explained how knowledge of sociology and geography could illuminate distance education research. Additionally, if data were categorized within parallel structures, comparative and secondary analyses of first level data could more readily be conducted in pursuit of social science explanations. The second issue of the new online academic journal, *The International Review of Research in Open and Distance Learning* will feature nine case studies of distance education institutions that have converted their academic certificate or degree programs from print-based formats to Internet-based formats. Since these case studies will be following a similar systems thinking structure, subsequent comparisons with examination of similarities and differences will be possible.

Although there is much international distance education activity, particularly at stages 1-4, comparative distance education research is definitely underrepresented in the distance education literature. The question may be asked, "To what extent have any of these steps been the focus of comparative distance education research?" True enough, there are books and monographs that report on such activities but these reports have been particularistic, focussing on single instances, and devoid of comparative analysis. Both international distance education research and comparative distance education research have yet make a significant contribution to our deeper understanding of distance education phenomena and practices.

**IV. Impediments to comparative distance education research**

Several reasons may be advanced to account for international distance education and comparative distance education not being more developed as areas of research:

1. Financially strapped universities and governments tend not to value the collection of statistics relative to the yet-to-be fully accepted distance education provision.

2. At the level of both nations and institutions, collection of data on distance education provision tends to be assigned a lower priority than collection of data on mainstream residential education supported by politically dominant vested interests.

3. In many countries, particularly poorer countries, information and information-gathering capacity relative to distance education is often nonexistent.

4. With a lack of equivalence in parallel data sets, there is confusion arising from the use of common words to refer to highly dissimilar activities in different countries.

5. Few of those who are engaged in distance education have academic grounding in the social sciences. Hence, their interpretations of distance education phenomena tend to rely on educational and common sense explanations, rather than on social science analysis. Being grounded in the field of practice, such practitioners do not typically place a high priority on empirical research.

In the penultimate section of the paper I present suggestions for counteracting these conditions that contribute to the dearth of comparative distance education research. In the next section I present a framework for researchers who wish to become more involved with comparative distance education research.
V. A Framework for comparative distance education research

In this section I describe a framework to guide researchers who wish to write case studies of distance education phenomena in such a way as to enable subsequent comparative analysis. This framework rests on a systems approach defined as a series of defined steps, drawn from systems theory, researchers may take to describe and analyze similar circumstances encountered by more than one institutions engaged in the design, development, delivery, and assessment of open and distance learning. Although institutions may differ markedly in their history, structures, culture, and be manifest very differently at different institutions, the systems approach provides a common framework that can enable discussion and analysis of similarities and dissimilarities as well as identification of common underlying themes. Indeed, adherence to a common framework may enable added value in the form of mid-range theories that offer practical insights to administrators and institutions similarly engaged in the process of conversion to online programming.

A systems approach calls for description and analysis of problems and issues in light of the context external to the institution as well as forces within the institution itself. This framework is justified on two grounds:

1. At the level of preparation of individual case studies:
   a. Systems thinking enables case studies authors to draw on a common language and concepts to describe the experiences encountered as their respective institutions experience specific distance education phenomena, circumstances, or events.
   b. Systems thinking suggests a sequence for preparation of a case study in terms of the description and analysis of the various contexts (environments) related to specific distance education phenomena, circumstances, or events.
   c. Systems thinking enables expansion of thinking from mere surface details relating to specific distance education phenomena, circumstances, or events to the totality of the circumstances in which they occur. Paths of reciprocal influence among different parts of the system involved in the phenomena can then be identified and examined in terms of their underlying context and structures.

2. At the level of comparing case studies
   a. With authors drawing on a common systems approach to their case studies, comparisons of the information presented in the case studies may more easily be made.
   b. Identification of common themes and issues across dissimilar institutional contexts will facilitate generation of middle range theory, yielding insights useful for administrators and other institutions encountering similar phenomena, circumstances, or events.

The focus of case studies will vary according to the issue or issues being studied. The basic elements of the framework to guide the case studies are depicted in Figure 1. This framework comprises both the extra-institutional environmental influences emanating from the society in which the institution is located and the defined institutional environment of the institution. The factors that influence the internal environment of the institution as geography, economy, politics, demographics, technology, culture, competition, and history, converge to form within the institutional environment demands for institutional management, quality, cost containment, effectiveness, intra- and inter-institutional collaboration, resource development and reallocation, efficiency, access, growth, efficiency, and restructuring. These demands, in turn, exert pressure upon the three organizational features that give the institution its unique identity: structures, cultures, and processes (Cuban, 1999).
Although his conceptualization of distance education as a system predates the advent of the computer or the Internet, Kaye’s (1982; see also Kaye and Rumble, 1982) division of distance education systems into four subsystems still finds applicability today. He perceived the subsystems comprising courses, students, regulatory, and logistical. The course subsystem consisted of creation, production, and distribution of instruction. The students subsystem consisted of the administrative functions for management and control of students’ progress such as admission, allocation to courses, collection of fees, ensuring receipt of course materials, and communication of expected performance. The regulatory subsystem consisted of the academic and administrative decision-making staff and bodies involved in planning and evaluating within the hierarchy of the institution. The logistical subsystem consisted of the functions of procurement and supply of required resources (purchasing, maintenance, and personnel). The organizational operations at each of these levels may be discussed in terms of how they relate to the unique structures, culture, and processes of the institution. The interrelationships among these concepts are illustrated in Figure 2.

Figure 1. A systems approach to the preparation of case studies of distance education phenomena, circumstances, or events.

Figure 2. Effects of distance education program conversion process on four system categories.
An Outline for Case Studies

To increase the probability that case studies will produce comparable and parallel information, a common structure is proposed. The major components corresponding to the main headings in a case study are displayed in Figure 3. Prompted by each of these headings, the outline may be organized as follows:

I. Abstract: A summary and overview
II. Introduction
   A. Brief description of the institution
   B. Brief mention of the kinds of problems and/or issues encountered (to be explained subsequently in the case study).
   C. Brief summary of the institution’s response to the issue(s) or circumstance(s) (also to be explained subsequently in the case study).
   D. Overview of how the case study is organized.
III. How are the structure, culture and processes unique to your institution?
IV. What are the extra-institutional (societal) context or environmental factors (see Table 2) that have had the greatest influence on your institution?
V. What have been the most influential institutional environmental demands on your institution?
VI. What has been the sequence of events (“critical incidents”) in connection with the specific issue(s) or circumstance(s) and the institution’s response?
VII. What have been the intended and unintended consequences (see Figure 3) of the institution’s response for:
   A. the learning/teaching system (including students)?
   B. institutional level operational systems?
   C. course development management system?
   D. course delivery system?
VIII. What have been the implications of this experience for:
   A. your institution in general?
   B. the administration?
   C. the academics in your institution?
   D. learners?
   E. other institutions in similar circumstances?
IX. Conclusions

This outline is intended to be an illustrative rather than exhaustive guide for comparative studies in distance education. Once the data sufficient for multiple case studies have been collected, information can be juxtaposed under each heading in the outline and then compared. The result will be meaningful comparisons that take into account cross-national, cross-cultural, and cross-institutional
similarities and differences. Responses to the questions in the outline may encompass a variety of interdisciplinary perspectives.

VI. Utility of the Comparative Method

Value of Comparative Distance Education Studies

Despite its marked absence from the literature of distance education, comparative distance education can contribute significantly to distance education theory, research and practice. Clearly the history of distance education demonstrates the value of adopting and adapting practices pioneered on other shores. Thus distance education practitioners and scholars have much to gain from becoming more knowledgeable about distance education in other countries. To the extent comparative distance education becomes a vital part of the literature of the field, to that same extent distance educators will be able to:

1. improve the ways they conceptualize the process of distance education
2. expand their awareness of distance education functions corresponding to the course, student, regulatory, and logistical subsystems (Kaye,1982)
3. initiate meaningful reforms needed to confront fundamental issues surrounding the practice and study of distance education
4. continuously develop their overall appreciation of and commitment to distance education
5. improve the scientific rigor and comparability of their own distance education research
6. increase appreciation of the efforts of distance education colleagues in other countries who are addressing issues similar to their own
7. increase the likelihood of collaborative comparative research projects with colleagues in other countries
8. contribute to the development of a systematic body of knowledge which can orient the improvement and growth of open and distance learning

Value of Interdisciplinary Research

The ever expanding breadth and scope of global forces are contributing to the number, variety, and complexity of open and distance education programs. If the number and frequency of research journals and research conferences were any indication, it would appear that the volume of information about the field is also increasing. Indeed, the maturity of distance education as a discipline in its own right is dependent upon a continuing expansion of the corpus of knowledge relating to open and distance learning. The knowledge dissemination activities of distance education practitioners in the course of their work, then, are crucial to such growth. By not only sharing their experiences and insights but by also engaging in systematic comparative analyses, distance education practitioners can assist in elaboration of generalizations and principles of value to other practitioners facing similar circumstances. Practice-based explanations and solutions, however, will probably be insufficient for the solution to all problems in open and distance learning as a field of practice.

When it comes to the investigation of open and distance learning phenomena, distance education researchers can look beyond the particulars of single distance education settings and draw on theoretical insights generated in a whole array of other disciplines. The interdisciplinary structure of knowledge relating to distance education is suggested by the World Bank (2000) sponsored Global Distance Education Net taxonomy that consists of four domains: teaching-learning, management, technology, and policy. Each of these domains conjures conceptual underpinnings from an array of disciplines: instructional design and educational technology, adult and continuing education, psychology, sociology,
computer science, marketing, visual arts, organizational development, and administrative science, to
name only a few. To research open and distance learning phenomena in holistic terms, one has to
borrow conceptual, theoretical, and empirical contributions of multiple disciplines.

As distance educators turn to conceptual tools and methods developed in other disciplines, they may
profit from a prescription given by Jensen (1964) some 36 years ago for practitioners in the related field of
adult and continuing education. When facing problems of practice beyond the scope of available
(practice-based) knowledge, distance educators may consider Jensen’s five steps to borrowing and
reformulating knowledge from other disciplines:

1. determine the basic elements of the problem at hand
2. search the literature of relevant social sciences for theoretical and/or empirically based
conceptualizations of these basic elements
3. borrow and, where necessary, recast (reformulate) that knowledge to explain more adequately the
open and distance learning situation at hand
4. construct and test hypotheses of possible outcomes of certain course of action suggested by the
literature of the relevant discipline
5. disseminate the findings of the applications

The role of the first step of Jensen’s procedure is pivotal. The researcher must be able to “read” the
forces or factors that underlie particular distance education phenomena, situation, or events and then to
link those forces or factors with the theoretical literature of specific social science disciplines. Being able
to “see” those linkages enables the researcher to identify the relevant literature. It may be possible for
the distance educator to partner with social science researchers willing to undertake joint research. The
results may include contributions not only to the field of open and distance learning, but also to the
disciplines contributing the interdisciplinary concepts and tools.

VII. Advancing the Comparative Distance Education Agenda

One of the premises underlying this paper is that knowledge based on comparative distance education
research can advance the field of open and distance learning. If the quality and quantity of comparative
distance education research is to increase, distance education researchers will need to increase their
comparative method knowledge and skills and there must be greater opportunities to conduct such
research than there have been up to now. In this section I suggest some specific ways to advance a
comparative distance education agenda.

Closer ties between distance educators and the field of comparative education

Because comparative education is a discipline in its own right with its own identifiable body of knowledge,
well established research methodologies, and both prestigious and recognized scholarly journals,
distance educators can benefit from alliances with social science scholars, educational policymakers, and
practitioners who identify with this international intellectual community. In studying distance education
phenomena, circumstances and events, distance educators can adapt methods and theoretical
perspectives developed by comparativists, despite their primary focus on traditional primary, secondary,
and tertiary face-to-face schooling. Joint research projects may be possible. Comparative education
journals may serve as alternative outlets for reporting comparative distance education studies.

Graduate programs of study in distance education

Regardless of the particular label that may be attached to them, graduate programs of study in distance
education and related fields play a pivotal role in the formation of distance education leaders. Graduate
courses can be designed that teach not only the “know how” but also the “why for” of comparative
distance education research. The content in other courses can include content based on systematic comparisons among institutions, cultures, and nations. Research practica can be devised to provide hands-on experience in the conducting of comparative distance education research. As graduate students realize the benefits to be derived from such research, they will be more likely to engage in such research over the course of their careers.

**Conferences**

Conferences constitute one of the principal means whereby distance educators experience professional development. If conference organizers plan workshops and conference sessions designed to promote the preparation of case studies that follow parallel structures, conference participants will be more aware of the added value of reporting more than single instances of distance education phenomena, circumstances, or events; as a result they will be more willing to expend the extra efforts required to produce such studies. Skill-building conference activities can be scheduled to encourage conference participants to engage in mutual identification of common problems about which collaborative comparative research projects can be planned and subsequently conducted.

**Associations**

In addition to assisting their members to keep abreast of developments in their respective fields, professional associations can provide other professional activity structures for members who share common interests. By encouraging the formation of special interest groups concerned about conducting research, including comparative research, national, regional, and national associations can be instrumental in the forming of interdisciplinary and cross-national teams of researchers likely to engage in collaborative comparative distance education research.

**Journals**

Distance education journals can establish comparative distance education research as a desired category of research manuscripts. They can also plan thematic issues featuring comparative distance education research reports. Such issues can signal to the field the importance of this kind of research and the articles that appear in such thematic issues can serve as role models worthy of emulation. Articles that stress methodology can strengthen the capacity of people in the field to respond to comparative distance education research opportunities.

**International working groups**

Ubiquity of the Internet that can enable distance education researchers who share a common interest in comparative distance education to form international working groups. Professional associations can lead the way with listservs and computer mediated conferences to facilitate the setting of shared research agenda. Discussions can then proceed to agree upon a division of labor for conducting multilateral comparative research projects.

**VIII. Summary**

Although a minority of contributors to the literature of the field of open and distance learning have drawn on comparative syntheses and analyses in their writings, most studies of foreign distance education practice fits the description of international distance education rather than of comparative distance education. The literature is replete with “show and tell” descriptions rather than systematic analyses; focus on single rather than multiple instances of distance education phenomena, circumstances, or events; lack parallel structure in their presentation; infrequent or nonexistent comparisons; and offer few empirically grounded generalizations. The potentially greater insights for practice or further research to be obtained from cross-national, cross-cultural, interdisciplinary, and cross-institutional comparisons have yet to be realized. Even across dissimilar institutional settings, comparative distance education studies could yield findings that are generalizable, constitute a significant empirical basis for practical
implications, provide advancement in knowledge of the field of distance education, and enable insightful planning and practice of distance education programs.

Systems thinking suggests a way to structure studies of single instances of distance education phenomena, circumstances, or events so as to increase the likelihood that they will yield information that can be compared. The systems framework described in this paper includes headings that can guide the preparation of multiple and parallel case studies.

Stake holders can foster comparative distance education research in a variety of ways: distance educators can seek closer ties with the field of comparative education, graduate programs can include comparative distance education in their curricula, conferences can integrate professional development opportunities relative to comparative distance education research, as can associations; journals can dedicate special issues to the topic and international working groups can be formed to tackle common theoretical and practical issues.

References


