

Comparative Case Study: A Methodological Solution for Researching Policy Implementation Studies in Developing Context

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Abstract

Policy implementation in education is a global challenge in general and developing context in particular due to contextual complexities, which hamper standard step-by-step policy implementation process. Hence, the developing context demands a responsive and robust methodological approach for understanding the complexities related to policy implementation to suggest appropriate ways for successful implementation. The meta-analyses of policy studies reveal standard quantitative surveys and experiments that inform the extent of implementation and interview-based qualitative studies describe the process. The analyses emphasise multidimensional and multi-methodological comparative approaches, particularly for understanding real implementation challenges of large-scale public policies. In this context, the Comparative Case Study (CCS) of Bartlett and Vavrus (2017) is a suitable research design to capture the multidimensional complexity of policy implementation in a developing context. CCS offers horizontal (across space), vertical (to and across levels) and transversal (historical) analyses to trace and track connections and interactions among the policy stakeholders at various levels and sites. It offers actor-network analysis and critical discourse to understand the complexities related to power dynamics. It also captures the ethnographic understanding and phenomenological perspectives of the stakeholders. Overall, it suggests what works in the context of how and why. Therefore, CCS is suggested for researching large-scale policy processes, particularly policy implementation in developing contexts like Pakistan.

Keywords: Policy Implementation, Complexity, Developing Context, and Comparative Case Study

Introduction

Policy processes hold a key significance in improving complex education systems across the globe. The scholars and researchers view policy processes in two distinct ways: i) policymaking and implementation are distinct stages (Fowler, 2008; O'Toole, Jr, 2000; Sabatier, 1987, 1988), ii) policy is a heuristic and iterative process, so policy formulation and implementation cannot be separated ((Ali, 2006; Ball, 1993,

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1994; Ball, et al., 2012; Bell & Stevenson, 2006; Howlett, 2018; Hupe & Hill, 2015; Hupe, et al., 2014; Lopes, 2016). Both approaches suggest successful policy implementation depends on the planning stage. However, most of the policies due to unforeseen problems at the implementation stage do not achieve mentionable targets in true spirits (Khushik & Diemer, 2018; Makuvaza & Shizha, 2017). Looking at the western societies, post-colonial countries in Asia and Sub-Saharan Africa have been trying various reforms like National Education Policies (NEPs), revised curricula and local reforms to improve education indicators and overall well-being of the nation but observed complete or partial failure. This persistent implementation failure has been pushing developing countries in adopting and implementing bilateral and multilateral reforms like Education for All (EFA), Millennium Development Goals (MDGs) and Sustainable Development Goals (SDGs) to increase basic literacy, reduce gender disparity, improve quality of education and so on (Ahsan, 2003; Farooqi & Forbes, 2019; Khushik & Diemer, 2018; Makuvaza & Shizha, 2017; NEMIS, 2018; UNDP, 2018). Though some progress is witnessed on various indicators, however even basic targets like Universal Primary Education (UPE) are not achieved yet (Husain, 2018; Hussain, 2020; Makuvaza & Shizha, 2017; NEMIS, 2018; UNDP, 2018). Not only local unforeseen disruptions affected the global reforms but also there had been longstanding political tensions and infighting among the global key stakeholders including UNESCO and the World Bank in EFA about the promotion of universal access to education and improving the quality of schooling in the developing world (Tikly, 2017).

The above discussed desperate scenario questions prevailing educational bureaucracy, lawmakers, academia particularly policy researchers and International Organisations (IOs) for not introducing contextually relevant feasible policy implementation models. In this regard, Viennet and Pont (2017) did a meta-analysis of 17 policy implementation models/frameworks and suggested the following a four-point framework for successful implementation.

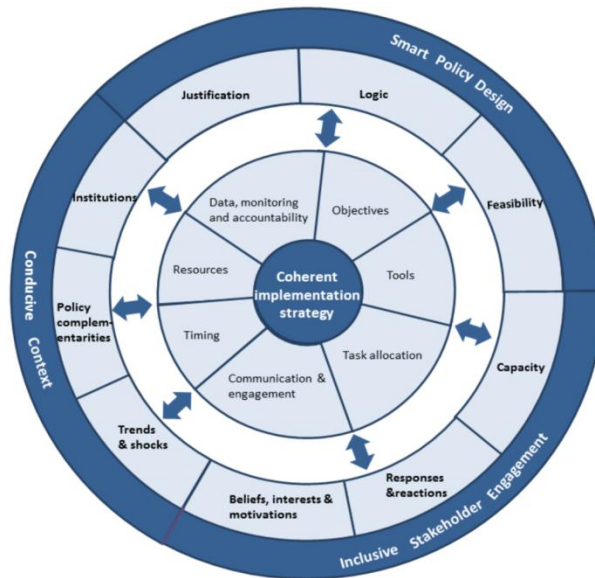


Figure 1

The four aspects are: i) smart policy design for logical and feasible solutions of the problem, ii) conducive context including acknowledging prevailing governance, iii) inclusiveness in recognising and engaging the stakeholders, and iv) coherent implementation strategy. Analysis suggests that most of the policies including National Education Policies, Global reforms and local initiatives fail at the implementation stage in developing context do have such aspects but contextual complexities stumble the standard models. Hence, the emerging need is to understand contextual implementation challenges in-depth through either ethnographic case studies or exploring experiences and perspectives of the implementers and other stakeholders. To do so, the purpose of this paper is to discuss the complexity of policy implementation in education, identify methodological gaps in researching policy implementation and suggest Comparative Case Study (CCS)—a well-suited methodological approach for researching policy implementation in education. The paper will help the scholars especially policy implementation researchers including graduate and postgraduate students to apply CCS for researching the policies in a particular context for contextually relevant recommendations.

Policy Implementation in Education (PIE)

Policy Implementation in Education (PIE) is a purposeful, multidirectional, contextualised, inclusive, evolving, heuristic, iterative, dynamic process of actualising policy text into reality (Ali, 2014; Ball, 1993, 1994, 2007; Ball, et al., 2012; Bell & Stevenson, 2006; Fullan, 2015; Howlett, 2018; Hupe & Hill, 2015; Hupe et al., 2014;

Lopes, 2016; Viennet & Pont, 2017). Based on the cited literature we conclude “education policy implementation is a complex, evolving process that involves many stakeholders and can result in failure if not well-targeted” (Viennet & Pont, 2017, p.6). The complexity becomes double due to the evolving, inclusive, dynamic, and highly subjective nature of education systems. Thus, PIE becomes more challenging and opposite to standard linear and reductionist approaches based on predictions or goals by controlling the variables affecting the policy implementation process to solve problems and bring about change (Auld, et al., 2019; Cerna, 2013; Husain, 2018; Mueller, 2019). And it seems hard to control the increased complexity of policy implementation but it can be reduced and harnessed through appropriate policy design and strategy (Mueller, 2019). The design must meet three prerequisites: i) analytical to match policy goals and means, ii) managerial to deploy resources for implementation, and iii) political to create an inclusive, coordinated and supportive working environment (Mukherjee & Bali, 2019).

It is not simple as suggested by (Mukherjee & Bali, 2019; Viennet & Pont, 2017) because challenges in global south are multidimensional and contextual. For example, donors’ influence, poor human resource capacity of legislatures, policymakers and implementers, corruption particularly financial corruption at all levels, bureaucratic hurdles, poor prevailing governance processes, unnecessary political influence, lack of an operational plan, strategy, and scarcity of resources for implementation (Ali, 2006; Ali & Ashraf, 2018; Hudson, et al., 2019; Hupe & Hill, 2015; Mueller, 2019; Signe, 2017). An observation adds some other contextual reasons such as the negative role of teacher unions, incremental mode of governance, lack of transparency, fear of accountability, the gap between policymakers and implementers and lack of support from allied departments like finance. All in all, due to the above reasons failure is inevitable because neither most of the policies meet the basic three prerequisites of Mukherjee and Bali (2019) nor addressing the above-mentioned challenges.

Moreover, for large-scale policies, a diverse demographic reality is another challenge. The same policy and programme produce different results across sites (Bhutta, et al., 2018; Sukkur IBA University, 2013, 2014, 2015, 2016, 2018). It proves one size does not fit all. Therefore, the following methodological analyses were done to identify a suitable methodology for large-scale policy studies, mainly implementation across sites over time.

Methodological Analysis of Policy Studies

Four factors are essential while analysing policy (implementation): i) understanding the complex nature of policy, which is heuristic, iterative, evolving, inclusive, formal, informal, messy, embryonic, etc. (Ball, 2015; Ball et al., 2012), ii) the sample who are politically sensitive, educated and busy policymakers and implementers in sharing information (Gibton, 2016), iii) context, which is neither general nor local

but particular and multicultural due to involvement of various stakeholders in different demographics (Ball et al., 2012; Bartlett & Vavrus, 2017), and iv) the socio-cultural multi-sited and multi-scalar demographics of large-scale policy implementation. So, to understand the methodological criticality of policy implementation that how it works in the context, Desimone (2009)

"Questions focusing on how and why a program or policy works nearly always necessitates in-depth data generated from qualitative approaches like case studies. Understanding the complexities and interactions and contextual influences of policy implementation and effects requires rich data that surveys and assessment cannot capture" (p. 164).

Desimone's understanding of educational institutions and policy implementation as complex social organisations and processes is correct and based on their highly subjective, iterative and evolving epistemological positioning. Stephen Ball - a founding figure in policy studies, builds his work on the policy-sociology approach, is also in favour of qualitative methods in researching policy (Ball et al., 2012). Thus, the complex and evolving nature of policy implementation in education demands necessary timely attention to understand its nature, determinants, possible solutions, contextually relevant strategies, and operational plans. In this connection, a meta-analysis of seven policy implementation studies (Bhutta et al., 2018; Dyer, 1999; Hongbiao, 2013; Keogh et al., 2020; Reyes, 2009; Suleiman, et al., 2017; Warwick, et al., 1992) mainly from developing context was done to identify methodological challenges/gaps.

Methods

The annotated bibliography of (Bhutta et al., 2018; Dyer, 1999; Hongbiao, 2013; Keogh et al., 2020; Reyes, 2009; Suleiman, et al., 2017; Warwick et al., 1992) is the preferred method for analysing the methodological gaps. The bibliography focuses context of the study, methodology and methods, key findings and methodological gaps. For a detailed annotated matrix, please see Annexure A. The findings are discussed below.

Findings and Discussion of the Methodological Analysis

The methodological analysis of policy implementation studies reveal that no methodology is perfect for researching the nature of policy implementation in education, which is complex, messy, embryonic, evolving, contested, etc. Each method has contextual limitations including cause-and-effect, survey and traditional interviewing-based qualitative methodologies for researching multidimensional complexity of large-scale policy implementation in developing context. For example, hardly any survey research can lead to understanding the nature of policy implementation that how it works and does not and why. However, traditional

qualitative methods only help in describing the process but misleading in exploring critical insights on the evolving nature of policy implementation. Secondly, borrowed methodological and implementation models or frameworks are little use in presence of diverse, dysfunctional bureaucratic educational governance and cultures. Also, the findings disclose the key stakeholders' perspectives and experiences are essential in understanding the complexity of the policy implementation process (Suleiman et al., 2017; Warwick et al., 1992). Thus, exploring multi-sited and multi-scalar roles, relationships and interactions may guide the necessary linkages for successful policy implementation (Dyer, 1999).

The analysis guides for pragmatic solutions to improve policy implementation in a developing context like Pakistan. In this context, research methodology must be robust with respect to understanding the nature and complexity of large-scale multisite and multi-scalar policy implementation to generate contextually feasible findings for development. Also, for holistic understanding, phenomenological perspectives of the implementers, comprehensive cross-site analysis, ethnographic understanding of the context, network analysis of policy actors, and critical discourse analysis of the process and policy text are important to take methodological decisions for generating reliable knowledge. The Comparative Case Study (CCS) of Bartlett and Vavrus (2017) (discussed later) meets the above-discussed criteria of the multidimensional approach and provides opportunities for the researchers to explore and understand the complexity of policy implementation. In this connection, the following two meta-analyses support CCS.

Phulkerd et al. (2015) conducted a systematic literature review of 52 policy implementation studies and found that most of the quantitative methods and tools found the extent of implementation but miss out on an in-depth understanding of the complex process. However, traditional qualitative methods and tools based on interviewing portrayed a description of the process that how policy is implemented. They admit both narrative descriptions of the process and extent are important but the purpose of understanding the complexity of implementation is not addressed well. Therefore, they recommended the need for harmonization of high-quality qualitative and quantitative methods and tools to ensure cross-site comparative assessment of large-scale public policy implementation across the settings (localities, regions, and countries) over time.

Secondly, Gibton (2016) did a meta-analysis of 22 qualitative policy studies. He concluded that a simple cause-and-effect approach may not serve the purpose of researching policy, which is a transdisciplinary field having multiple theoretical foundations. In-depth contextual understanding, thick description, and rigorous data gathering and analysis process "makes qualitative research a legitimate and indispensable tool for policy studies and policy analysis" (Gibton, 2016, p. 38). He concluded that the multiple pragmatic nature of inductive approaches is suitable for

researching transdisciplinary policy to understand the holistic, multidimensional, inclusive, and evolving process of policy processes, particularly implementation. Gibton's conclusion is based on three streams of inductive approaches: (i) Methodological stream includes various methodologies, like grounded theory, interpretive, narrative inquiry, case studies, action inquiry, phenomenology, etc.), (ii) Disciplinary stream adds different disciplines like sociology, education, political science, etc. and (iii) conceptual stream is about various theoretical foundations, like critical, social justice, feminist, constructivist, etc.

Keeping in view the analyses, it is concluded that a robust multidimensional and multi-methodological research design needs to be applied to capture the complexity of policy implementation in challenging developing contexts like Pakistan. In this regard, the Comparative Case Study (CCS) of Bartlett and Vavrus (Bartlet & Vavrus, 2015, 2017, 2020;) is a suitable methodological approach apprehending the complexity and evolving nature of large-scale multi-sited and multi-scalar policy studies.

Comparative Case Study (CCS): A Methodological Solution for Policy Studies

Comparative Case Study (CCS) initially called Vertical Case Study is a well-suited, multi-sited and multi-scalar research methodology to understand policy processes, particularly a sociocultural lens of policy-as-practice or policy implementation (appropriation) through its three-axis: (i) vertical is to and across the micro (individual/school/district/province), meso (state/province/country) and macro (state/province/country) scales (ii) horizontal is across space and time that how the policy is made and implemented at various equivalent and similar sites concurrently and (iii) transversal that how the policy is historically suited, wherefrom it has emerged, what are its local and international roots and how it is culturally appropriate (Bartlett & Vavrus, 2017, 2014).

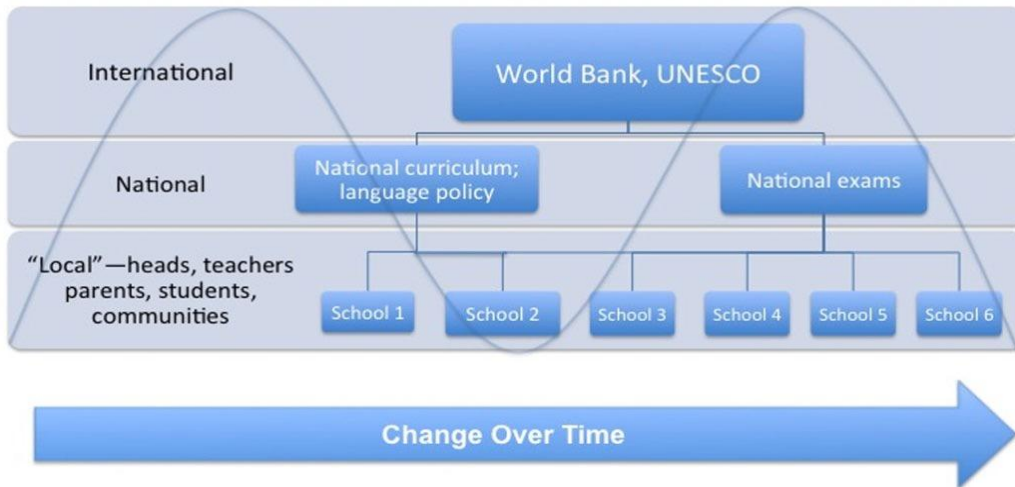


Figure 1. Multi-sited Comparative Case Study

Furthermore, CCS is heuristic in nature and it critically examines the power and authority of social actors at various levels through vertical analysis. It encourages tracking or tracing historical sociocultural interactions across and through sites and scales.

"CCS calls on researchers to think about how they might achieve a cultural understanding of the production and appropriation of policy by doing shorter-term periods of research in multiple sites across different scales to create a case study attentive to horizontal, vertical and temporal comparison" (Bartlett & Vavrus, 2017, p.40).

Moreover, CCS assumes policies and practices are not developed in isolation. Social actors get influenced by different motives at different levels and work in 'tandem'. This cyclic back and forth process involves multiple stakeholders in constructing, deconstructing and reconstructing the knowledge through discourse on policies and practices. The discourse involves power dynamics and links CCS to Critical Theory (CT), Critical Discourse Analysis (CDA) and Actor-Network Theory (ANT) and Phenomenology. Therefore, CCS is not only a multi-methodological approach but grounded in multiple theories and philosophies. Through CDA it understands and critiques social inequality and power for change, which is the ultimate objective of the policy implementation in education (Fullan, 2015). Also, with the help of Actor Network Analysis (ANA), CCS traces various linkages between human and non-human actors, networks, and assemblages across the scales over time. All these meaningful attributes of CCS are embedded in its three outset elements that 'what works' and 'how' in terms of policy design, implementation, and evaluation.

1. Horizontal Comparison

Horizontal is the across comparison of the policy at various distinct locations of the same scale, such as schools, clinics, districts, provinces and even countries. Three key assumptions of horizontal comparison are: (i) historic and contemporary processes and events influence the case (policy), (ii) homologous comparison may or may not involve 'nested' or 'embedded' comparisons and (iii) heterologous comparison like multi-sited ethnography traces phenomenon across sites (more or less same but not equivalent). The following two subsequent paragraphs discuss homologous and heterozygous comparisons.

Homologous horizontal compares micro-level units of equivalent positions and structures to track and trace the influence of political, social, and economic factors on the case or site. For example, district to district and school to school. Level-wise fieldwork is suggested to modify tools and strategies for required information from the sample. However, due to limited time, doctoral students or lone researchers can do horizontal and vertical fieldwork simultaneously, and rely on secondary sources for transversal comparison to understand the historical roots of the phenomenon at various sites. This is a useful method for policy studies at various equivalent sites to investigate the extent, process and critical insights.

A heterologous horizontal comparison like multi-sited ethnography compares categorically distinct units or sites at a relative scale to unfold the phenomenon. The selection of units depends on the nature of the case or phenomenon. For instance, schools, teacher training institutes, and non-formal education centres at the district level. Bajaj's (2012) study on the implementation of Human Rights Education (HRE) in 18 states of India helps in conceptualising this method. The researcher selected 6 states based on maximum variation: three years of implementation of HRE, selection of urban and rural sites and participants (religion, caste, age, length of time, education). Altogether 118 HRE teachers, 625 students, 80 staff, and policymakers were selected. Various methods like surveys, focus group discussions, interviews, and observations were used for 13 months. The researcher gathered micro-level (school) data with attention to meso (state/province) and macro-level (international/global). Secondary literature and HRE work of other institutions were also reviewed in tracing historical roots to examine the rise of HRE over time (transversal). Overall, the researcher integrated heterologous and homologous horizontal, vertical, and transversal comparisons in a single project to explore the comprehensive picture of the case (implementation of HRE).

As discussed above, the horizontal comparison suggests various methods, mainly interviews and observations. The interview should start with an open-ended question, then ask the interviewees to respond as per comfort zone and end the interview with confirmatory questions. Secondly, for observation, an investigator

should keep in mind the purpose (What are you looking for, where, when, how, and why? Will you use any tools? Why or why not? How will you record your data during observations?). A researcher should reflect on the observation that (What were the most important things you learned? What went well? What did not, and how could you change it in the future? What did you miss? What should be your next step, methodologically, given what you learned?). Each research question may require a different observation tool and interview questions. Therefore, the researcher has to be well-planned and systematic in interviewing, observing, taking notes, recording, expanding notes, writing memos, and analytical reports. Overall, horizontal comparison understands how the same policy produces similar and different outcomes at demographically different sites over time.

Horizontal comparison prefers different sampling strategies mainly snowball and convenience sampling. Bartlett and Vavrus prefer Miles and Huberman (1994) for data analysis.

2. *Vertical Comparison*

Vertical comparison unfolds the concept of policy mobility and networks of Ball (2016) that policy travels through assemblages of actors in bits and pieces rather than coherent networks and packages. He advocates network analysis and network ethnography. However, CCS delineates vertical and horizontal axis that how people, objects, and discourse at various scales are connected through policy. This way, it is linked to Actor Network Theory (ANT) that how human and non-human actors are connected historically. Besides, tracing interactions and connections between various levels like district and province and or between the province and National / Global (World Bank) is a multi-scalar comparison, which links CCS with Critical Discourse Analysis (CDA) and Actor Network Analysis (ANA). ANA and CDA are additional features of vertical comparison to explore and understand the multidimensional complexities of policy processes including policy implementation at various levels. That how various levels are connected? How new connections develop and end? What interactions are taking place between and among the scales? What particular networks and discourse emerge and evolve at what level and how?

Central assumptions of vertical comparison are: comparison begins with a priori (two districts). How the stakeholders at different scales respond similarly and differently to the policy in the same culture? The policy would benefit by tracing the relationships of actors and actants and form non-permanent assemblages for policymaking and implementation. National governments do adopt/receive international/global policies via institutions due to economic and political powers.

Vertical comparison is useful in investigating scalar roles, responsibilities, relationships, power dynamics and contributing factors on policy processes. Matrices and networks are prominent ways to present vertical analysis.

3. *Transversal Comparison*

Transversal comparison is to trace out historical connections horizontally and vertically over time. It assumes that contemporary policy must have historical roots, things must have changed over time, and time and space are closely connected. The study of change and consistency over time opens up alternative explanations for phenomena that may seem self-evident if examined only from a contemporary perspective.

Bartlett and Vavrus (2015, 2017) recommend various methods for transversal comparison. Such as Focus Group Discussions, Actor Network Analysis, Archival research Memoing on archival research, Life histories, oral histories, observations and surveying. Ideally, ethnographic understanding and document analysis are essential for transversal comparison. However, due to limited time a researcher, particularly a doctoral student can rely on secondary sources to trace historical and global ideologies in local practices (Bartlett & Vavrus, 2015). This will help "how actors, including non-human actors, operating at different levels or scales, become enrolled in and accountable to networks that span space and time" (Bartlett & Vavrus, 2017. p.144).

Conclusion

Policy implementation is a global challenge. A heterogeneous developing context faces complex multidimensional problems related to policy design, capacity, context and culture. Standard methodologies hardly help in creating new knowledge related to policy implementation aspects in developing contexts. As a result, the developing context relies on policy borrowing, which could not solve even basic problems like literacy and quality education. Therefore, a responsive methodological approach is required (Halai, 2011). Methodological analyses guide for a multi-methodological approach to understand multi-dimensional and evolving complexity of policy processes, especially implementation. The meta-methodological analysis informs Comparative Case Study (CCS) is a multidimensional approach of researching policy processes with the help of three comparisons (horizontal, vertical, transversal), Actor Network Analysis (ANA), Critical Discourse Analysis (CDA), phenomenological perspectives, ethnographic understanding and survey. This multi-methodological approach not only informs the extent and process of implementation but also unpacks what works and does not how and why. Therefore, CCS applies at various levels from school to international for researching collaborative long-term and short-term projects and policies. CCS is flexible for research institutions, independent researchers and consortiums to plan and execute lone and collaborative research projects. Its application may be useful in addressing policy implementation challenges at various levels. Therefore, it is strongly suggested to use CCS in researching the implementation and effectiveness of policies at various levels across space and time. The CCS will help in

understanding the extent of implementation and effectiveness in similar contexts to design.

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