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# Case Studies as a Research Strategy in Comparative Education

## Abstract

This article is an attempt at analysing one of the qualitative methods increasingly used in educational research, particularly in the context of dynamic social, cultural, and political changes. It focuses on the research question of how case studies are applied in comparative research, with particular emphasis on their strengths and limitations, the use of typological and processual approaches, and the role of the cultural and social context. The study adopts a qualitative approach, incorporating literature review, synthesis of data from various sources, and a three-dimensional (vertical, horizontal, transverse) comparison of selected cases. The findings demonstrate that this strategy is highly effective in studying educational processes in their natural settings and has strong potential to generate contextually grounded and in-depth conclusions. The summary underscores the importance of combining methodological approaches and accounting for contextual volatility to produce more relevant comparative interpretations.

**Keywords:** case study, comparative education, typological approach, processual approach, social and cultural context

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## Introduction

Case study research is one of the key strategies that has been employed for many years across a range of scientific disciplines. In the context of education systems, case studies are widely used to collect detailed information on various aspects of education (Cohen et al., 2000). Robert K. Yin (2009, p. 18) defines the case study as “an empirical inquiry that investigates a contemporary phenomenon within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident.” Yin argues that the potential for generalising findings from case studies is often limited and depends on how well the selected cases represent the sample studied. In turn, Robert E. Stake (1995, p. 127), describes the case study as “a research strategy which involves an in-depth study of specific programs, events or persons, taking into account their particularity and complexity in various contexts.” For Jean Hartley (2004, p. 323), the key aim of the case study is “understanding processes as they occur in their specific environment, because no social phenomenon can be fully understood without its context.” Henryk Mizerek (2017, p. 10) notes that “the selection of the cases is one of the most difficult stages in the process of designing the study,” highlighting the ongoing debate over the precise definition of a case study.

In the context of comparative education,<sup>1</sup> the case study strategy allows in-depth analysis of educational policies and practices across countries. The World Bank’s analyses of education reforms in developing countries illustrate how different contexts affect the implementation of educational policies (Steiner-Khamsi, 2006). As globalisation and political shifts exert more and more influence on education, case studies become ever more relevant, offering insights into diverse educational systems within their specific cultural and social settings (Little, 2000).

This article aims to present the significance of the case study in comparative education and its role in clarifying the differences and similarities between education systems. It addresses three research questions: What are the main advantages and limitations of

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<sup>1</sup> This paper uses the term “comparative education” in reference to the work of Mark Bray, Bob Adamson and Mark Mason titled *Education research: Approaches and methods* (2014). It constitutes an important source for understanding the methodology and approaches used in comparative research in education.

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applying case studies in educational research? How do typological and processual approaches influence comparative analysis? How do social and cultural contexts shape the findings in comparative research?

This study employs a comprehensive scientific approach, integrating various analytical and synthetic methods to achieve a comprehensive view of the topic. The key stages of the process include: (1) literature review – aimed at collecting a broad spectrum of information from studies, articles, and reports to form a comprehensive picture of the current knowledge in the field; (2) data synthesis – involving the integration of information from various sources to gain a deeper understanding of the issues; and (3) formulation of conclusions – drawing key insights based on the integrated data and literature review.

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## Cases in Educational Research: The Typological Approach and the Processual Approach

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The term “case” in the research context refers to contemporary phenomena analysed within a broader social and systemic framework. Definitions of this concept can be found in the works of Yin (2009) and Stake (1995), among others. Since the 1960s, two main streams have emerged in comparative education. One focuses on research concerning development and geographical regions; the other emphasises large-scale assessments of educational achievements, such as studies conducted by the International Association for the Evaluation of Educational Achievement (IEA). Both recognise context and culture as important factors affecting the findings (Parreira do Amaral, 2022; Steiner-Khamsi, 2006).

Since the beginning of the 21<sup>st</sup> century, comparativists have increasingly more often adopted the case study strategy in their research (Bartlett & Vavrus, 2017; Little, 2000). The number of studies focused solely on single countries without meaningful comparisons is declining (Wiseman & Anderson, 2013). The acceptance and application of the case study strategy in research stems largely from globalisation and its impact on educational policy and practice. Moreover, debates in the social and human sciences on such issues as culture, context, space, place, and comparison have prompted a re-evaluation of case study methodologies in comparative and international education (Parreira do Amaral, 2022). In response, case study approaches in international research no longer view the social sphere as fixed and unchanging, but rather as dynamic. This perspective acknowledges that the social world is culturally constructed and inherently incomplete and fluid, in contrast to earlier views that treated social phenomena as fixed and natural.

Comparative case studies are defined as “the systematic comparison of two or more cases using the case study method” (Kaarbo & Beasley, 1999, p. 372). Researchers use case studies to investigate and compare units such as schools, education systems,

or education policies to understand how context and conditions shape the phenomena studied, as well as to see what mechanisms underlie the differences and similarities observed. Such studies can reveal factors affecting the findings and practices across cases, thus allowing a better understanding and development of theories and practices in the field. Importantly, in comparative methodology, the case study is not confined to a single, isolated instance. Instead, it creates a broader analytical framework by comparing multiple cases, allowing for the identification of general patterns and principles that may apply in various situations. This makes it possible to formulate theories with broader relevance – particularly valuable in comparative education, where the study of diverse education systems under varying conditions and contexts is essential.

Comparative analysis distinguishes between two main approaches: typological and processual (Bartlett & Vavrus, 2016). Typological comparison involves directly comparing different cases to identify differences and similarities and to develop typologies or classifications. For example, a typological comparison would be the one examining differences between English-speaking and other countries in their approaches to education, as presented by John Furlong and Geoff Whitty (2017). In English-speaking countries, educational research often focuses on individual cases and specific local contexts. In turn, studies on education conducted elsewhere may adopt more standardised theoretical and methodological frameworks.

Processual comparison focuses on examining and following a given phenomenon, problem, or process across different contexts or levels (locally, regionally, nationally). In *Qualitative research design: An interactive approach*, Joseph A. Maxwell (2013) explores how various actors, circumstances, events, and related processes influence each other and how these interactions develop over time.

A case study makes it possible to understand both how organisational processes and human behaviours shape the context, and how the context, in turn, influences those processes and behaviours in an organisation (Kozuch & Marzec, 2014). Such analyses are vital for gaining full insight into the research context. Processual comparison requires methodological flexibility: researchers must adapt their methods as new insights emerge, which may lead to changes in the study’s structure. An example of a processual analysis would be the study of the impact globalisation has on educational policy in three distinct countries – Denmark, Nepal, and China – as described by Stephen Carney (2009, p. 79). Despite significant differences, such as in economic development, political structures, and educational traditions, certain shared traits can be noticed. Global trends, such as an emphasis on 21<sup>st</sup> century skills, can be observed throughout the three countries. However, each country interprets and applies these trends in line with its own specific context. In this work, Carney (2009) introduces the term “policyscapes” to describe the complexity and

dynamics involved in developing and implementing education policies. This takes into account various factors such as local needs, international trends, domestic policy, national culture, and global influences which altogether make up the educational “policy-scape” of each country analysed.

Typological comparisons identify patterns and categories in education systems, allowing a better understanding of differences and similarities. They are also instrumental in constructing typologies and classifications that are essential for formulating education policies and implementing reforms. In turn, the processual approach in comparative analysis enables a more in-depth understanding of education policy by uncovering the mechanisms and relationships that shape and influence policy implementation in varied contexts. Combining these approaches with the vertical, horizontal, and transverse dimensions of analysis provides a more comprehensive understanding of educational phenomena across contexts.

Frances Vavrus and Lesley Bartlett (2017) broaden the methodological perspective by introducing three analytical dimensions: horizontal (across research locations), vertical (across different levels, e.g. local, regional), and transverse (over time). Horizontal comparisons examine units at the same structural or hierarchical level; for example, it could be a comparison of education systems in countries with similar levels of economic development (Silova & Niyozov, 2020). Vertical comparisons explore the influence of different hierarchical levels on one another and track changes in the quality of education across those levels (Phillips & Schweisfurth, 2006). Transverse comparisons focus on analysing cases across different temporal or spatial contexts, such as in a study of education policies in various countries during the same year (Apple & Apple, 2004). Integrating typological and processual approaches with these three dimensions yields a holistic view of educational phenomena (Parreira do Amaral, 2022). This integration enables researchers to examine both the structural features of education systems and the evolving processes within different contexts and timeframes. A holistic approach that addresses multiple dimensions of research and remains sensitive to cultural and contextual factors is crucial for understanding the differences and similarities in education, as well as for identifying the key mechanisms and relationships that shape education policy.

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### **Sensitivity to Culture and Context in Comparative Research in Education**

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Sensitivity to culture and context is key in comparative education research, as education does not operate in a vacuum but within specific social, cultural, and political frameworks. Contextual sensitivity requires researchers to consider local, social, institutional, and historical factors that shape educational practices. Robert Levine’s research (2002) demonstrates how cultural values influence the development of

educational systems in various communities, while Robin Alexander (2000) underlines that culture is an integral element that shapes educational practices. Culture influences how education is conceptualised and implemented, and also affects social and educational structures. That is why in analysing education systems in different countries, it is crucial to consider the cultural context.

One example is the study by Jouni Välijärvi et al. (2002), which shows how historical and cultural factors have contributed to the success of the Finnish education system in the PISA 2000 study. Pirjo Linnakylä (2002) supports these conclusions, explaining that Finnish students’ high performance is rooted in a longstanding cultural tradition that strongly values reading skills. This tradition was significantly shaped by the Reformation in Northern Europe (1517-1648), during which parents were required to read the Bible to their children. Since the 16<sup>th</sup> century, when Finland was part of Sweden, reading proficiency was necessary to receive sacraments and to enter into Christian marriage. Children’s reading skills were publicly assessed during the annual *kinkerit*; the lack of reading skills meant public shame and denial of marriage. As a result, over the centuries, nearly every Finnish child was raised in a household where both parents were literate, which had a lasting impact on the development of reading proficiency across society. These examples illustrate how cultural and historical factors affect educational outcomes, as in the case of the Finnish education system, which reflects deeply rooted cultural traditions. To draw meaningful conclusions from cross-cultural comparisons, researchers must identify and account for all relevant contextual factors. Overgeneralisation can lead to oversimplified findings (Mason, 2014).

Integrating the horizontal, vertical, and transverse dimensions of the analysis while incorporating cultural and contextual considerations allows a more precise understanding of the differences and similarities between the education systems. In comparative studies, acknowledging both structural and processual aspects within their cultural and historical contexts enhances our understanding of the mechanisms shaping education policy and helps to identify the key factors influencing the functioning of education systems across different settings and periods.

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### **Designing Comparative Research in Education**

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A case study may involve both flexible forms of inquiry and more structured approaches. Robert K. Yin (2009) identifies five main components of the design: the research questions, the propositions, the ‘cases’, the logic linking data to the propositions, and the criteria for interpreting the findings. In contrast, Robert E. Stake (1995) emphasises flexibility and the possibility of modifying the research plan as the study progresses, in line with the approach known as progressive focussing.

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Unlike Yin (2009), Stake (1995) advocates for a flexible design that allows significant changes even after the research has begun. Although he does not specify when data collection and analysis should start, his recommendations on formulating research questions suggest that researchers should define two or three clear questions to “help structure observations, interviews, and document analysis” (1995, p. 20). The flexibility of Stake’s approach derives from the concept of “progressive focussing,” developed by M. Parlett and D. Hamilton (1976), who argue that “the course of the study cannot be completely planned in advance” (as cited in Stake, 1995, p. 22). This view stands in contrast to Yin’s more rigid approach. Therefore, when designing comparative research using the case study strategy, it is important to consider several key factors.

The first key consideration is the number of cases. A single system of education may be enough, provided that the theory justifying the research is adequate to the purpose of the analysis. For instance, an in-depth examination of one school employing an innovative teaching method may provide valuable information on its specific properties if the researcher offers a strong rationale for case selection and mitigates subjective bias (Berg, 2004; Flyvbjerg, 2006). Conversely, analysing multiple cases enables broader testing of theory across different contexts, helping to generalise findings and identify universal patterns or limitations, for example, in evaluating the effectiveness of teaching methods across different schools.

Second, case selection must align with the research objectives. If the aim is to explore diversity in minority education or educational management, then incorporating examples from various education systems would be recommended. Such an approach can facilitate the development of typologies and foster a deeper understanding of the phenomena studied, allowing the researcher to capture the differences and similarities across cultural and educational contexts.

Third, case study analysis distinguishes between two main methods: case comparison and controlled comparison. Case comparison involves examining several cases to draw general conclusions. Controlled comparison starts with a single case, leading to the development of a theoretical model, which is then tested and refined using additional cases. Both models have their advantages and may be used depending on the research objectives. The case study strategy is thus suitable for both single-case analysis and multi-case comparative studies aimed at theory development.

Fourth, the level of detail in case descriptions is key in designing comparative research. Researchers may apply qualitative, quantitative and mixed methods. Regardless of the method chosen, it is important to include both detailed single-case analyses and broader comparisons across cases. Qualitative methods, in particular, allow for nuanced exploration of individual cases. In multi-case studies, the depth of analysis may range from meticulous analyses to more succinct summaries, which allows the researcher to better capture the differences and similarities in various contexts.

Ultimately, selecting an appropriate research design is critical to the success of comparative, case study-based research in education. The number and selection of cases, the analytical method, and the level of descriptive detail are all key factors that influence the quality and reliability of the findings. A thoughtful and deliberate approach to these issues can lead to a deeper understanding of the educational phenomena across various contexts and support the development of educational theory. Methodological literature also highlights the importance of such strategies as triangulation, which can help mitigate limitations and enhance the credibility of research findings (Yazan, 2015).

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## Summary. Final Remarks

The case study is a valuable research strategy in comparative education, allowing an incisive analysis of educational processes and phenomena within their real social and cultural contexts. The use of both typological and processual approaches allows a multifaceted examination of education systems, addressing not only their structural features but also the dynamic changes over time and across different settings. Integrating these perspectives enhances our understanding of the mechanisms that shape education policy, especially in the light of the complex interactions between local practices and global trends.

In addressing the research questions, it is important to emphasise that the case study method helps to identify the specific characteristics of local educational solutions and analyse their contextual conditions. Applying analysis across three dimensions (vertical, horizontal, and transverse) supports the multi-layered approach to educational challenges and enables cross-national comparisons.

At the same time, this strategy is not without limitations. Difficulties in generalising the findings, the diverse social and cultural contexts, the potential for interpretive subjectivity, and difficulties in accessing data across different countries all affect the quality and reliability of case study analyses. The complex nature of this research strategy demands careful design and critical reflection on the scope, objectives, and interpretation of the findings.

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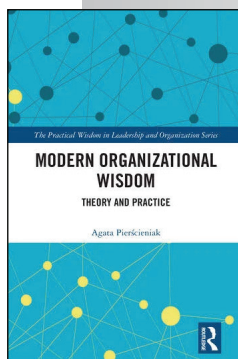
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The full list of references is available in the online version of the journal.

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## WE RECOMMEND

**Agata Piersceniak, *Modern Organizational Wisdom. Theory and Practice***

*Modern Organizational Wisdom: Theory and Practice* presents a fresh perspective on knowledge management processes, exploring how employee expertise transforms into practical solutions for organizational challenges. This innovative concept, grounded in the scientific achievements of organizational learning and absorptive capacity, sheds new light on converting knowledge into action. The book introduces a procedure that links key knowledge management concepts, streamlining their understanding and simplifying their application. This approach makes complex phenomena more accessible and practical for professionals. In the theoretical section, the book outlines a straightforward model of Modern Organizational Wisdom (MOW), which consists of

a knowledge-to-solution transformation process complemented by a set of organizational competencies essential to its success. Including these competencies as an integral component of MOW represents a groundbreaking approach to this subject. The practical section bridges theory with real-world applications, offering insights into how these phenomena manifest in business practice. Readers will discover the drivers that foster MOW and the obstacles that hinder its development. With its accessible language and innovative take on organizational wisdom, this book inspires researchers in knowledge and strategic management and is a valuable resource for practitioners. It helps leaders understand how their employees' knowledge can fuel business growth and success.

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