

## The theoretical and methodological principles of studying the experience of historical figures in the context of pedagogical comparativistics

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**Annotation.** The article is devoted to the substantiation of the theoretical and methodological principles of the interpretation and application of the experience of historical figures in the context of a comparative analysis of pedagogical processes in educational systems. A thorough analysis of literary sources on the historical and comparative approach to the study of pedagogical phenomena is presented, the goals, methods and principles of conducting research in the field of comparative pedagogy with the aim of characterizing, explaining and predicting pedagogical facts and phenomena are analysed. The characteristics of the methods of comparative analysis, as well as the main principles of comparative research, are provided. The main classes of sources of information are presented as a determining factor of comparative studies: the works of famous teachers, philosophers, writers, public and political figures who worked in different eras from ancient times to the present; institutional documents; polemical literature; publications devoted to the study of trends characteristic of the educational space; anthologies – collections of legislative acts, regulatory documents and other data from official archives and government reports, etc.; books and publications reflecting the socio-cultural and political-economic state of society in a certain era. The classification of approaches to comparative research is characterized: diachronic, synchronous, quasi-synchronous or quasi-diachronic; the problems faced by scientists during comparative research are highlighted. The article focuses on the algorithm of conducting historical and pedagogical research through the implementation of a number of stages.

**Keywords:** famous figure, historical-pedagogical comparative studies, methods and principles of historical-pedagogical comparative studies, the influence of outstanding educators on the development of education

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## Теоретико-методологічні засади вивчення історичних персоналій в контексті педагогічної компаративістики

**Анотація.** Стаття присвячена обґрунтуванню теоретико-методологічних засад трактування та застосування досвіду історичних персоналій в контексті компаративного аналізу педагогічних процесів в освітніх системах. Подано ґрунтовний аналіз літературних джерел з питань історико-компаративного підходу до вивчення педагогічних явищ, проаналізовано цілі, методи та принципи проведення досліджень в галузі порівняльної педагогіки з метою характеристики, пояснення та передбачення педагогічних фактів і явищ. Наведено характеристику методів компаративного аналізу, подано класифікаційні ознаки аналітичного, описового, оцінювального, дослідницького та предиктивного методів, а також результати аналізу основних принципів компаративних досліджень: принципу історизму, логічного взаємозв'язку, об'єктивності; принципу цілісності освітніх систем. Подано основні класи джерел інформації, як визначального фактору компаративістики: праці відомих педагогів, філософів, письменників, громадсько-політичних діячів, що працювали у різні епохи від найдавніших часів до сьогодення; інституційні документи; полемічна література; публікації, присвячені вивченню тенденцій, що характерні для освітнього простору; антології – збірники законодавчих актів, нормативних документів та інших даних офіційних архівів та урядових звітів тощо; книги та публікації, що відображають соціально-культурний та політико-економічний стан суспільства у певну епоху. Схарактеризовано класифікацію підходів до проведення компаративних досліджень: діахронний, синхронний, квазісинхронний чи квазідіахронний, а також виокремлено проблеми, які постають перед науковцями під час проведення компаративних досліджень: доступу до ресурсів, які становлять джерельну базу дослідження; інтерпретації матеріалів; періодизації; етноцентризму, мови й перекладу термінів, що характеризують освітні явища та реалії. В статті акцентовано на алгоритмі проведення історико-педагогічного дослідження через реалізацію низки етапів: визначення і конкретизація об'єкта дослідження; збір інформації; оцінювання та синтез даних; формулювання і представлення висновків.

**Ключові слова:** персоналія, історико-педагогічна компаративістика, методи і принципи історико-педагогічної компаративістики, вплив видатних освітян на розвиток освіти.

### Introduction

The modern education system is oriented to the personality and, interests and needs of the student, taking into account his individual characteristics, the mental criteria the national community. As practice shows, modern problems in the organization of the pedagogical process require substantiation of the theoretical and methodological foundations of education in order to realize the goal of the pedagogical process. There is a need to analyse foreign pedagogical systems in general and the activities and views of specific personalities in particular. We consider as an effective approach the application of the methodological foundations of comparative pedagogy, which is engaged in the study of the peculiarities of the functioning of educational systems in different countries, the development of pedagogical science, the scientific and pedagogical activities of outstanding educators who had a significant impact on the development of education in a certain country with the aim of using positive pedagogical experience in national education system [13], [15]. It is the modern system of education in Ukraine that involves the study of the experience of both Ukrainian pedagogical figures and foreign teachers in the formation of the theoretical and methodological basis for modern pedagogical thought development. This led to the choice of the topic of our research.

*The analysis of recent research and publications.* The study of the formation and development of the education system of foreign countries and historical figures and educators that significantly influenced the formation of educational systems brings to the fore the problem of comparative analysis, namely, the historical-comparative approach to the study of pedagogical phenomena [21]. The main goal of conducting research in the field of comparative pedagogy is the explanation and prediction of pedagogical facts and phenomena. Nowadays, comparative analysis continues to be widely used in various fields of both humanities and technical sciences. The theory and practice of domestic comparative pedagogical science were enriched by the works of N. Bidiuk, O. Lokshyna, N. Mukan, A. Sbruieva, and many other researchers. Among the leading foreign comparatists, it is worth mentioning D. Wilson, J. Shreiwier, B. Holmes, etc. R. Brislin, G. Verma, R. Edwards, P. Kubow, M. Crossley, K. Mallick, R. Thomas, J. Schriewer, etc. investigated the methodology problem of comparative historical and pedagogical research. The vast majority of comparatist scientists study the peculiarities of the functioning of modern educational systems, analyse the issues of globalization processes in society and education, the impact of innovative information technologies on the educational process, considering the methodology of comparative studies [15], [16]. Separate aspects of the methodology of conducting comparative historical-pedagogical research were studied by W. Borg, M. Gall, G. McCulloch, A. Novoa, W. Richardson, but this problem remains relevant to this day.

Today, Ukraine is in a state of war, which has brought new challenges to the Ukrainian education system, and therefore there is an urgent need to review the theoretical and methodological approaches to the organization of the learning process in this difficult period using the experience of other countries, the historical experience of famous figures in educational sphere.

*The formulation of article purpose.* To conduct an analysis of the theoretical and methodological foundations of the organization of the pedagogical process based on the methods of pedagogical comparative study and the study of the experience of individual pedagogical figures of world pedagogical thought.

## **Results**

Modern research in the field of pedagogy should take into account approaches and principles regarding the choice of a research methods. Theoreticians and practitioners of pedagogical science approach the classification of comparative research methods in different ways. So, for example, D. Adamson and G. Theisen distinguish analytical, descriptive, evaluative, research methods [22]. According to D. Phillips, all mentioned research methods are important and should cover the historical aspect, since the culture of any people is formed by the events of the past. National education systems are based on the historical foundation and philosophical wisdom of the people [19]. K. Watson singles out another method – predictive, which presupposes the prediction of the future development of educational phenomena and processes based on the availability of historical and modern data about them [25]. According to G. Verma and K. Mallick, the main directions of modern scientific and pedagogical research include historical, descriptive and experimental methods [24].

To understand the current state and prospects of education development in Ukraine, it is natural to study its historical and pedagogical development, which makes it possible to gain a deeper understanding of the causes of certain phenomena, understand their nature, and investigate their origins. Scientists define the historical method of scientific and pedagogical research as "... systematic collection and objective assessment of data relating to past events, ... with the aim of confirming hypotheses regarding the causes, consequences or trends that led to the emergence of certain phenomena and can help to better understand modern events in education and predict the future" [24, p. 75].

The comparative method is not limited only to comparison. It is aimed at a comprehensive cognitive study of national and foreign reality as a dynamic, internally differentiated and changing system, interconnected with various aspects of culture and society of a certain people [3], [4].

The origins of comparative analysis in history date back to ancient times. In particular, Herodotus in his work "History" went far beyond the Hellenistic world, including a description of Egypt, India, Babylon, Arabia and Persia. Plutarch made comparative biographies of outstanding people of the ancient world through paired biographies. Plato used methods of comparative analysis, characterizing the features of the Spartan and Athenian educational systems. With the use of comparative data, the ancient Greek Laws of Solon were concluded, and in ancient Rome – the Laws of the XII Tables [12]. The traditions of comparative analysis are revealed in Polybius, Cicero, the Ukrainian chronicler Nestor, in the memoirs of travellers of the Middle Ages and modern times.

In the historiography of modern times, the comparative approach was used by educators. "Historical thinking of the Enlightenment era was based on the basic idea that man everywhere ... and under any conditions is a being equally gifted human being with reason. Therefore, the comparison of European and non-European cultures, historical processes in the historiography of the Enlightenment had the goal of revealing the identity of the human race in any of its historical manifestations" [8, p. 364].

Modern scientists increasingly turn to the study of experiences outside their country, using the comparative method of conducting research as the most effective means of studying foreign reality. Based on a comparative approach to the study of processes and phenomena during the 19th and 20th centuries, new fields of scientific knowledge are being formed. Since the historical analysis is focused on the study of the past of pedagogy with the aim of using positive experience in modern conditions, and the comparative analysis is reduced to the study of the specifics of the pedagogical reality in different countries of the world, the use of a comparative approach in historical-pedagogical research, i.e. the study of educational phenomena of foreign countries of the world, is of particular interest in a certain historical era. This concerns the study of the development of educational systems, the analysis of cultural-social, political-economic features of education in different countries of the world, the study of the mutual influence of different educational systems on each other, as well as the study and comparison of the development of education in different regions of the same country [6].

It should be noted that the methodological aspects of comparative historical-pedagogical research cannot be reduced to the comparative method alone. As V. Sadova notes, they cover the problems of creating pedagogical paradigms, mass pedagogical ideals and ideas of different peoples in various historical eras, etc. The problem of typology in a certain historical era of dominant pedagogical thinking, the structuring of pedagogical concepts and other problems in their specific historical interpretation is quite interesting [11].

We can state that comparative historical-pedagogical research is reduced to the study of historical features of the development of educational systems, their elements and certain pedagogical phenomena, figures, trends in the development of education in one or more countries of the world or regions of the same country, in the context of global trends in the development of pedagogy in a certain historical era, in order to identify similarities and differences in pedagogical processes that took place at that time in different countries of the world at different levels of the education management system. Comparative historical and pedagogical studies contribute to a deeper understanding of the historical context in which the education system developed. This enables education management bodies to formulate modern educational policy and effectively implement it, and also contributes to future planning of the development of the education system in general. Despite the renewed interest in comparative

studies in various fields of science, researchers see that "... today comparative studies are practically not involved in historical and pedagogical research" [11, p. 301].

Modern historical and comparative analysis in pedagogical research involves the use of a number of consistent, systematic and thorough research methods. This is an interpretive synthesis of past events and written references using a critical approach to their analysis and evaluation.

The organization and conduct of our research is based on generally accepted principles used in historical and pedagogical research, namely: the principle of historicism, which aims to determine the exact time and place of the emergence of a pedagogical phenomenon, concept or systems, as well as substantiating the difficulties associated with the establishment of an educational phenomenon. "The implementation of the principle of historicism leads to the discovery of innovations in the pedagogical experience of the past and, at the same time, allows to evaluate it from the standpoint of the present... In this way, historical and pedagogical knowledge is revealed in its dynamics and completeness of development" [9, p. 6]. The principle of logical interconnection, which is based on the fact that education evolves with the development of society itself, leads to the study of its needs. The principle of objectivity consists in the fact that the examination of historical and pedagogical phenomena takes place with a reflection of its truth. It is about an objective assessment of the emergence and retrospective of the formation of a pedagogical phenomenon and the exclusion of subjectivism, one-sidedness and bias in the selection and assessment of facts. At the same time, "the principle of objectivity does not exclude participation in the process of a person-researcher with his creative individuality, oriented in a certain way by the inner world" [5, p. 33].

Another important principle of comparative historical-pedagogical research is the observance of the principle of integrity of educational systems, the essence of which is a very careful approach to the generalization of content for the purpose of special study of certain aspects, elements of the educational system or certain pedagogical phenomena. The selection of one of them can be carried out only conditionally, constantly correlating the obtained results with the course of the entire process in general [5].

One of the most important elements of comparative historical and pedagogical research is the source base [2]. Comparative researchers classify sources of information as follows: the works of famous teachers, philosophers, writers, public and political figures who worked in different eras from ancient times to the present. Although these works, as a rule, express the subjective opinion of the author and do not consider a wide range of social and cultural problems of society, their value lies in the fact that they contain a lot of factual data about a certain era and the author's subjective vision of the problem of education in society. The author's works make up a significant part of the research source base; institutional documents. This includes publications on the days of educational institutions' anniversaries, student attendance records, documentation on the personnel of an educational institution, educational programs compiled on the basis of educational institutions. These sources are narrowly focused and generally have value in terms of statistical and factual data contained in the documents (pointing to a specific place, time, names, etc.).

Polemical literature covers publications in newspapers, magazines, as well as essays, pamphlets, letters, etc. Literature of a polemical nature has a special value from the perspective of a critical approach to the study of a certain pedagogical phenomenon or process, since education issues are considered here from the point of view of their positive and negative sides, the authors provide numerous arguments in support of a certain pedagogical phenomenon or sharp criticism of it. The polemical sources include both: publications of past years/centuries that consider important issues of the education system of that time, and books by modern authors who studied this pedagogical phenomenon. The correspondence of famous pedagogical figures with representatives of the authorities, relatives, friends from other countries, essays

by contemporaries, etc.; publications devoted to the study of trends characteristic of the educational space are among the most important examples of polemical literature.

Of particular interest for comparative historical-pedagogical research there are, for example, works related to the trends of centralization/decentralization of education management, professional education of teachers, etc.; anthologies – collections of legislative acts, regulatory documents and other data from official archives and government reports, etc. They make it possible to study in detail the regulatory framework in the field of education in a specific period of time, as well as to follow the chronology of educational reforms that took place in the field of education; books and publications reflecting the socio-cultural and political-economic state of society in a certain era. As you know, the education system is under the constant influence of other social factors and is significantly dependent on them.

The comparative approach to the study of pedagogical phenomena or processes that took place in the past involves the use of certain approaches. According to the classification of A. Sweeting [20], there are three main approaches to conducting comparative historical and pedagogical research:

- diachronic – related to the study of the chronology of events development, their historical sequence. The analysis provides a reason to recreate a retrospective of the development of the educational system and/or its constituent elements;
- synchronous – involves the study of a pedagogical phenomenon or the entire education system of the country in a certain time. The advantage of this analysis is that it is comprehensive, detailed, and allows considering socio-cultural and political-economic factors that influenced education in the studied period of time;
- quasi-synchronous or quasi-diachronic – come down to a combination of elements of synchronous and diachronic analyses. The advantage of this approach is that, on the one hand, it presents events in chronological order, and on the other hand, it helps to study in detail a certain pedagogical phenomenon and the system of factors that influenced it in a specific historical period [3].

While conducting comparative historical and pedagogical research, scientists face a number of problems:

- the problem of access to resources that constitute the source base of research, especially those stored in state archives and libraries. This problem is also related to the fact that very often important regulatory documents and archives are concentrated in different cities and even countries. On the other hand, the availability of access to resources does not always imply exhaustiveness and completeness of the presentation of the material. In this case, it is significant to use information from various sources (not only official data), but also to combine them with other oral, visual data, testimonies of individuals (for example, teachers, students, parents, school principals, etc.);
- the problem of materials interpretation. While conducting comparative historical-pedagogical research, it is necessary to take into account cause-and-effect relationships between phenomena and processes, as well as correctly establish the sources of ideas origin. As A. Sweeting notes, most often those who are credited with the authorship of a certain opinion or law are not actually their authors, but simply approve the submitted proposal with their own seal or signature [20];
- the problem of periodization. The periodization is the result of the work of historians and one of the possible forms of synthesis and organization of information. Nevertheless, there is an element of subjectivism in it. This is, for example, determining the starting and ending points of reference of historical periods, establishing the optimal option for their duration and connection with other social, economic, and political events, taking into account data of an endogenous and exogenous nature when studying the country's education system in general and its individual elements in particular;

- the problem of ethnocentrism means that the ability of an individual or a group of persons to perceive the phenomena of reality through the prism of traditions, values, culture inherent in the ethnic group to which he or she belongs. In other words, each scientist has personal experience, own understanding of educational phenomena and concepts, characteristic of his country of origin;
- the problem of language and translation of terms characterizing educational phenomena and realities. D. Phillips provides interesting examples of the divergence of concepts and translation difficulties. For example, in Great Britain there are secondary education institutions – grammar schools, while in the USA elementary schools are called “grammar schools”; the term “professor”, which has different meanings in the educational systems of the USA, Great Britain, Germany, and Ukraine.

The algorithm for conducting a comparative historical-pedagogical study involves the implementation of several consecutive stages:

I stage – the definition and specification of the research object;

II stage – gathering of information;

III stage – data evaluation and synthesis;

IV stage – formulation and presentation of conclusions [24].

At the stage of defining and concretizing the researched problem, it is worth remembering that comparative historical-pedagogical research is conducted for the purpose of studying past events within a specific time, taking into account their social, political, and economic contexts. This helps to establish causal relationships between certain pedagogical phenomena, events or concepts; only the information relevant to the purpose of the study is important for research [1], [3]. Comparative historical-pedagogical research is aimed at evaluating educational systems at certain stages of their evolution and description of the process of their modification during a certain period.

V. Borg and M. Gall single out five main directions of research in the field of historical comparative studies in pedagogy:

- comparative historical-pedagogical research of a social nature (education of the poor, education of women, overcoming illiteracy in society, etc.);
- comparative historical-pedagogical studies of the life and work of eminent persons, comparative studies of the work of teachers of different countries of the world, the history of the development of educational institutions, educational reforms, etc.;
- a new approach to the interpretation of already known events and phenomena, establishment of cause-and-effect relationships that were previously considered unrelated (for example, historical substantiation of the development of education/its elements in the context of socio-political events of the country);
- a synthesis of well-known data with new facts (recently discovered documents or information) in order to revise the already developed theory or pedagogical phenomenon; a new approach to the interpretation of past events that were previously studied) [14], [17].

Undoubtedly, the subject of comparative historical-pedagogical research is quite broad and can be detailed in many aspects, and therefore is not limited to the above-mentioned list of topics [1]. However, taking it into account and the principles we defined above, it is possible to single out the main tasks of the research: obtaining reliable scientific knowledge about the regularities of the development of various pedagogical phenomena and processes; study of the main trends of the world pedagogical space in a certain period of time, their comparison, mutual influences; study of the genesis of educational policy formation, new pedagogical ideas and phenomena in the education system of foreign countries, historical figures that influenced their development.

The second stage of conducting research is related to the collection of information. It is obvious, that historical information can be fragmentary. Noticeably, not all data that was recorded at a certain time in the past has been preserved. The maximum use of available historical sources significantly increases the quality of comparative historical-pedagogical research and the reliability of the obtained results.

At the third stage of comparative historical-pedagogical research, it is important to correctly approach the evaluation and synthesis of data. Information about past events that is available today has come to us from various sources. One of the approaches to the classification of carriers of historical and pedagogical information is their division into primary and secondary sources. Primary sources are original historical documents and data containing “first-hand” information. These are direct recorded observations of witnesses to the events (diaries of teachers, students, school principals, letters, etc.); physical artefacts (museum exhibits: pens, ink, writing boards, desks, relics); mechanical artefacts (films, video recordings, audio cassettes, records, photographs, drawings); records of participants in events that have legal value (constitutions or charters of educational institutions, laws, court decisions, minutes of meetings, genealogies, contracts, wills, permits, licenses and certificates, receipts for payment of tuition, articles from newspapers and magazines, books and textbooks).

Secondary sources include information handed down by someone else: articles and interviews, research reports, etc. The authors of these sources can be both people who lived in the studied era and modern researchers. Secondary sources have limited value, as information becomes subjective and distorted as it passes from one person to another. In this regard, secondary sources should be subjected to a thorough analysis, and their interpretation should be approached with caution [23].

As noted by G. Verma and K. Mallick, the classification of historical and pedagogical sources into primary and secondary is relative, since the same source can be both primary and secondary, depending on the purpose of comparative historical and pedagogical research. For example, if the purpose of the research is to study the educational policy of local education management bodies regarding issues of multiculturalism in education in a certain historical period of time, then publications in local newspapers of this period will be secondary sources. However, if the purpose of the research is to study publications in local newspapers on this issue, then they will form the primary source of information [24].

At the stage of data evaluation and synthesis, even if primary resources are used and supplemented with secondary ones, the question of the correctness of assessing the reliability of historical data, their reliability and relevance arises. Researchers of the methodology of conducting historical-pedagogical research call this process “historical criticism”, noting that a critical approach to the interpretation of historical-pedagogical data can be manifested in external and internal criticism [23].

The study of the historical context of the emergence and functioning of educational institutions, their management, educational subjects and methods of their teaching, professional training of teachers directly affects all participants in the pedagogical process, because modern educational policy and activity is the future history of education [14]. Accordingly, understanding the current situation in education requires studying the development of education in past centuries. Historical research in pedagogy provides answers to numerous questions regarding not only the emergence, but also the decline of certain educational phenomena. That is why a deep understanding of theoretical and methodological approaches to the study of the experience of famous pedagogical figures in the context of pedagogical comparative studies is important in the future development of the Ukrainian education system.

### **Conclusions**

The methodological and theoretical aspects of comparative studies are basic and decisive in the formation of the modern paradigm of education, and the use of pedagogical principles of comparativistics can be effective in building the education system of the future. Further areas of research include the analysis and use of the experience of individual pedagogical personalities who built and developed education in the post-war period in their countries.

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