

BEREDAY'S METHODOLOGICAL PROPOSAL FOR COMPARATIVE EDUCATION; COMMENTS AND POSSIBILITIES

A PROPOSTA METODOLÓGICA DE BEREDAY PARA A EDUCAÇÃO COMPARADA: COMENTÁRIOS E POSSIBILIDADES

PROPUESTA METODOLÓGICA DE BEREDAY PARA LA EDUCACIÓN COMPARATIVA: COMENTARIOS Y POSIBILIDADES

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ABSTRACT: Comparative Education is a method of studying national educational systems arising at the end of the 18th century in Europe and arriving in Brazil at the end of the 19th century. The following article aims to describe the different approaches of some classical authors, and some commentators in the area, describing the views and collaborations of all of them for a better understanding of the theoretical and methodological elements of Comparative Education, as well as the various changes and influences on research methodology in the field of comparative studies, at different times in history. In this direction, this article approaches and discusses the contribution of Bereday, understood as one of the main authors of Comparative Education; and Bray and Thomaz, Nóvoa and Bonitatibus, as some of the most studied commentators on the methodology of Comparative Education, and the possible relationships between them.

KEYWORDS: Comparative education. Research methodology. Educational systems.

RESUMO: *A Educação Comparada é um método de estudo sobre sistemas nacionais educacionais surgindo no fim do século XVIII na Europa e chegando ao Brasil no fim do século XIX. O artigo a seguir tem como objetivo descrever as diferentes abordagens de alguns autores clássicos, e de alguns comentaristas da área, descrevendo as visões e as colaborações de todos eles para o melhor entendimento dos pressupostos teóricos e metodológicos da Educação Comparada, assim como as diversas mudanças e influências na metodologia da pesquisa no campo dos estudos comparativos, em diferentes momentos da história. Nessa direção, o presente artigo aborda e discute a contribuição de Bereday, entendido como um dos principais autores da Educação Comparada; e de Bray e Thomaz, Nóvoa e Bonitatibus, como alguns dos mais estudados comentaristas de da metodologia da Educação Comparada, e as possíveis relações entre os mesmos.*

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PALAVRAS-CHAVE: *Educação comparada. Metodologia de pesquisa. Sistemas educativos.*

RESUMEN: *RESUMEN: La Educación Comparada es un método de estudio de los sistemas educativos nacionales que surgieron a fines del siglo XVIII en Europa y llegaron a Brasil a fines del siglo XIX. El siguiente artículo tiene como objetivo describir los diferentes enfoques de algunos autores clásicos, y algunos comentaristas del área, describiendo las visiones y colaboraciones de todos ellos para una mejor comprensión de los principios teóricos y metodológicos de la Educación Comparada, así como los diversos cambios y influencias en la metodología de la investigación en el campo de los estudios comparados, en diferentes momentos de la historia. En esta dirección, este artículo aborda y discute el aporte de Bereday, entendido como uno de los principales autores de Educación Comparada; y Bray y Thomaz, Bonitatibus y Nóvoa, como algunos de los comentaristas más estudiados sobre la metodología de la Educación Comparada y las posibles relaciones entre ellos.*

PALABRAS CLAVE: *Educación comparada. Metodología de la investigación. Sistemas educativos.*

Introduction

According to Lourenço Filho (2004), Comparative Education aims to study national educational systems, considering the peculiarities of their peoples, cultures, economy and politics, making the reflection of the reasons why that system is linked to a particular location, go beyond something imposed without analyzing the entire context. In this way, deepening the analysis of the “whys” and the influences that society has on education.

Bonitatibus (1989) defines that Comparative Education is not a discipline, but an interdisciplinary area that proposes to investigate educational systems, in intra or international dimensions, in the physical historical moment, or in movement. Interdisciplinarity is the crucial point of Comparative Education, when analyzing educational systems at the same time, especially when we propose to look for similarities and differences between the most diverse educational systems.

This author considers that Comparative Education can be divided into three dimensions, namely, the temporal, spatial and methodological dimensions. Thus, the investigation would start with the educational systems in a fixed or moving historical time, proceeding to the investigation at an intra or international level, and finally, the investigation would carry out its comparative part itself, that is, the analysis and interpretation of data collected from a comparison perspective.

Comparative Education, according to Bonitatibus (1989), emerged as an unsystematic and prescientific method with Marc-Antoine Julian. At this initial moment, the comparisons would happen in an almost accidental way, hence why Bonitatibus classifies it as unsystematic and prescientific. For this author,

The concern at the national level, as well as the attempt to carry out systematic studies in Comparative Education, could only arise when Europe moved, in terms of education, from universalism to nationalism, that is, at the end of the 18th century [...] (BONITATIBUS, p. 36, 1989, our translation)

Comparative Education studies are relatively recent. The first works that could be considered of a scientific character appear at the end of the 19th century, although in the 18th century there were already incidences on it. According to Lourenço Filho (2004), there are several factors such as language and the effects of communication in general; those of the rational and irrational conditions of human relations; those of the action of political, religious, aesthetic, legal and moral institutions.

According to Lourenço Filho (2004), Comparative Education propose itself already starting from institutionalized forms of teaching, deepening the analysis of these processes, in the context of various social groups and their integration into national society. He also emphasizes the need for these studies in a world that has growing communication between peoples. As well as the relationship of educational systems with the social structure of the analyzed country, it also reinforces the idea that Comparative Education has an interdisciplinary character.

Some of these circumstances are easy to characterize. They arise from the country's space, its geography, the composition and distribution of the respective population, the occupations to which different groups are engaged, and, with that, the primary forms of aggregation, cooperation and economic competition. Others, however, even though they support each other in all of this, are not so easy to discriminate. They concern the customs and traditions, desires and aspirations of each group, each small community, each region. They refer to the ways of living, working, believing and hoping. In what they have in common, they establish feelings of community, relationships between these groups, giving rise to forms of economic, civic, legal, religious, moral organization (LOURENÇO FILHO, 2004, p. 18, our translation).

Lourenço Filho (2004) describes that the role of Comparative Education is not to provide solutions for all nations, requiring that each one be analyzed with its specificities. With what is discovered after a study, not absolute truth, but hypotheses and construction of models to have a better understanding of educational processes and the conditions of their

institutionalization, providing counterpoints, contextualizing them with the local reality and greater chances of gain.

In Brazil, the first movements of Comparative Education began in 1870 with Joaquim Teixeira Macedo, Manoel P. Frazão, Amélia Fernandes da Costa and Leopoldina Tavares Portocarrero, who went to other countries to collect information. Returning to focus again only in 1913 with publications that dealt with it. In 1928 Antônio Teixeira, upon returning from abroad and carrying out work in the area, created the first systematic course in Comparative Education (LOURENÇO FILHO, 2004).

Comparative Education, according to Lourenço Filho (2004), has as its object the national education systems, so the descriptive part of these must be well explained. First, that each one has a role in the system, a political-administrative action in the institutions in their country of origin, that is, there is a formal function of these systems. But beyond that, there is the side of concrete situations such as the experience in schools, teachers, principals and the institution. Thus, this author suggests that there would be a division into a theoretical and a practical part of the research, explained by the literature review (composed especially by the analysis of educational legislation in each country) and the experience in schools, respectively.

Nóvoa (2010) considers that the idea of comparison was integrated into the methodology of various disciplines from the transition from the 18th to the 19th century, initiated by Marc-Antonie Jullie. Over the years, Comparative Education became part of undergraduate courses. In the period after World War II, the demand for the organization of national systems, for comprehensive educational policies and for an increase in the quality of education offered by countries, significantly helped to enhance (and a kind of "rebirth") of Education Compared.

Comparative Education studies were strongly influenced by human sciences in general and a special influence by social sciences in particular, especially in pedagogical reflections. For Nóvoa (2010), classic authors, such as Bereday, began their comparative studies in a previously positivist universe of quantitative approaches, emerging at a time in history in which ideology and technical discourses greatly influenced the perception of educational systems. The main reason why it is possible to compare is the existence of the other, comparing two or more, it is possible to put into practice.

The other is the *raison d'être* of Comparative Education: the other that serves as a model and reference, which legitimizes actions or imposes silences, which imitates or colonizes. Comparative Education is part of a field of

powers within which centers and peripheries are organized, discursive practices are built that enshrine meanings and define limits (NÓVOA, 2010, p. 24, our translation).

Bonitatibus (1989) when explaining the methodology, divides it into classic and recent. In classical authors, such as Bereday, they used a historical-philosophical interpretation, relating society and school, focusing on analyzing society in different dimensions, before analyzing the educational system itself. Those considered modern tend not to analyze educational systems as a whole, but rather in aspects or dimensions and function in global society, in a more functionalist and later a Marxist perspective.

When Bonitatibus (1989) focuses on Education Systems, she explains the importance of studies of national systems, as well as, in this way, comparative studies in education emerged at a time when Europe overcame, in the area of education, the monopoly of church. In this way, Comparative Education emerges as a social need.

According to Carvalho (2014), traditionally, comparative education studies aimed to analyze national education systems in the 19th century, but this has been changing over the years.

Comparative Education was marked by the social issues that emerged and by the different emphases and theoretical perspectives that divided men in facing these issues. Therefore, constituting a complex field, not only the object of Comparative Education was a recurrent theme in its trajectory, but so were its approaches and methods (CARVALHO, 2014, p. 129, our translation).

For Ferreira (2008), Comparative Education has always been aimed at understanding educational systems. However, Comparative Education is also a product of society and history and has been evolving according to human and knowledge evolution. Comparison in education generates a dynamic that forces the observation of similarities and differences, considering the social, political, and economic context. Thus, the study of problems established by educational systems need to be related to the context and realities of their country.

Ferreira (2014) says that Comparative Education has, with the act of comparing, the best way to reach the true educational reality.

It is the comparison that gives it uniqueness and identity and elevates Comparative Education to the possibility of showing the complexity and multiplicity of the educational phenomenon. However, the comparison can be interpreted as merely instrumental or as a thought-provoking intellectual act that seeks to reconstruct the challenge of education based on questions

that are provided by the variety of dynamics in question (FERREIRA, 2014, p. 3, our translation).

Therefore, Comparative Education is not independent from pedagogical and scientific changes, nor from the policies and social context in which it is applied. Thus, over time, it ends up becoming more necessary and used to understand changes in educational systems.

After the 1960s, other questions about the functions and purposes of Comparative Education had new developments. Nóvoa (2010) redefined this phase in four points: the ideology of progress, a concept of science, the idea of the Nation-State and the definition of the comparative method. The ideology of progress concerns the intention to improve educational systems. The concept of science, on the other hand, refers to a post-modern science, concerned with finding scientific solutions beyond a singular vision, designing options to solve something. The idea of the Nation-States, on the other hand, concerns the differences and similarities between two or more countries and, finally, the definition of the comparative method is the effort of comparativists to prove, theoretically and methodologically, that research in Comparative Education differs, by its method objects and objectives of other types of research.

As for Bray and Thomaz (1995), research in Comparative Education was very restrictive, and did not explore the different aspects of the situations proposed for the exercise of comparison, which led them to propose a more holistic and multifaceted vision for Comparative Education. Thus, they sought to achieve both a macro and a micro view of comparisons, and, having as their main objective, to identify what to compare, placing them in space and time.

Georges Bereday (1972), in the book “*Método Comparado em Educação*” (Comparative Method in Education), proposes that comparative research should start with an area study or descriptive study of a given geographic region. So, at first, familiarity is needed, if not complete, at least very intense, with the education system in that area or region. Studying a single country, simple as it may seem at first sight, becomes a significantly complicated task when we intend to compare it with other(s) country(ies) (BEREDAY, 1972, p. 38).

Thus, our objective in this article was to discuss the method proposed by Bereday and also address some of the main commentators in the field of Comparative Education, such as Nóvoa, Bray and Thomaz, Lourenço Filho and Bonitatibus, in order to identify possible points that can contribute to a correct understanding, in particular of Bereday's proposal and, in general, in the field of Comparative Education.

Description of the Comparative Education Map

To analyze the area of Comparative Education, Nóvoa (2010) proposes a Map of Comparative Education. In this map, having as references, on the one hand, descriptive approaches as opposed to conflictive approaches, and, on the other hand, consensus theories as opposed to conflict theories, this author inserts, in his understanding, the main scholars of Compared Education, classifying them into groups, which (these groups) Nóvoa calls configurations.

Configuration A is called by Nóvoa as “historicist perspectives”, which aimed to describe foreign educational systems and compare them with the country of origin, trying to understand the social and political relations that justify the education model used.

Configuration B, named by the author as "positivist perspectives", groups the authors whose comparative education studies have, according to Nóvoa, a positivist approach, understood as the study of "general, objective and scientific laws regarding the functioning and evolution of educational systems" (NÓVOA, 2010, p. 41, our translation), attributing to Education the function of supporting and reproducing social structures. Comparative Education, from this positivist perspective, is linked to a historical-philosophical literature and moves through the organization and treatment of quantitative data. The data can focus on particularities or can be general data from the researched systems.

Configuration C, called "perspectives of modernization", focuses on classification and typologies to guide educational policies, both for national states and for international agencies. Configuration D, on the other hand, named by Nóvoa as "perspectives for solving problems", understands Comparative Education as an important instrument of reform in education.

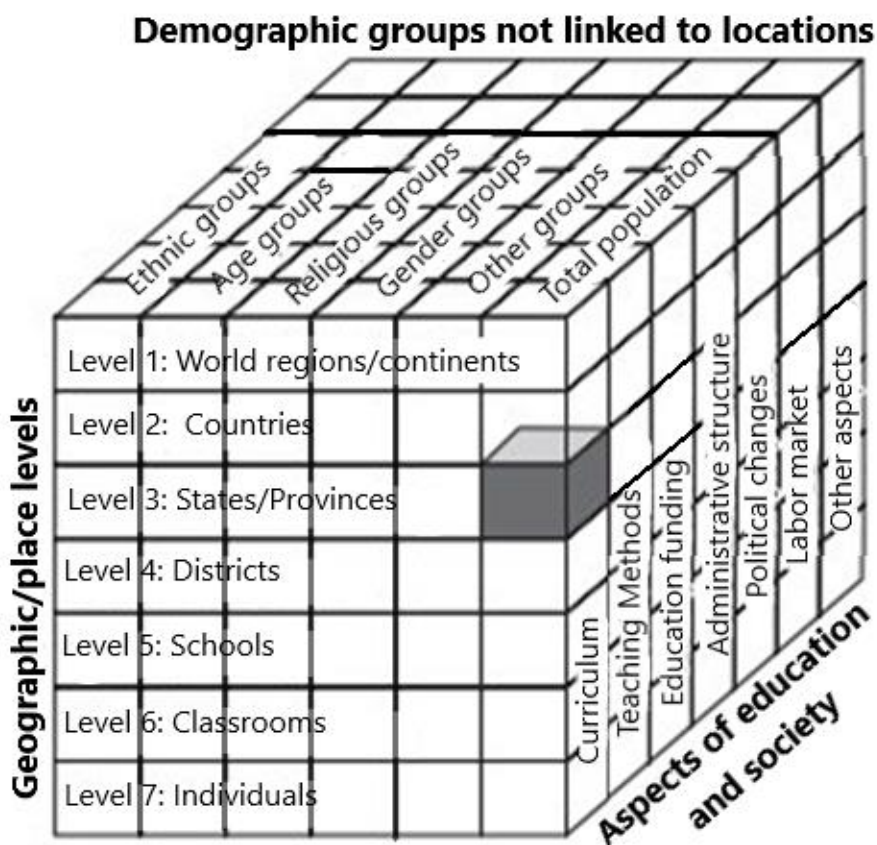
Configuration E, in turn, called “critical perspectives” does not have the main focus on the educational system or on a specific problem, but rather on promoting changes and innovations. Configuration F, named by Nóvoa as "perspectives of the world system", which, as the name itself indicates, has an opposite view to the more traditional views of Comparative Education, considering globalization a fundamental factor in the analysis of educational processes. Finally, Nóvoa (2010) presents the configuration G, called “socio-historical perspectives”, which seeks to analyze the facts from a historical and social point of view, under the strong influence of the space-time relationship.

Description of Bray and Thomaz's Cube

Bray and Thomaz's (1995) cube is divided into three different faces (or dimensions), with each of these three faces "extending" to its diametrically opposite face, in order to integrate international and intranational perspectives in the Comparative Education. In our understanding, the cube proposed by these authors helps us a lot in identifying the objects of comparison that will integrate the core (and define the objective) of research in Comparative Education.

On the first face of the cube are the seven geographic or place levels for comparisons: world regions/continents, countries, states/provinces, districts, schools, classrooms, and individuals. On the second face of the cube are demographic groups not linked to locations and consisting of ethnic, age, religious, gender, other groups and total populations. The third dimension of the cube is dedicated to aspects of education and society and includes items such as curriculum, teaching methods and educational funding.

Figure 1 – Bray and Thomas Cube



Source: Bray e Thomas (1995, p. 475)

Bereday Model for Studies in Comparative Education

We can say, roughly, that until the appearance of Bereday's (1972) proposal, more or less in the mid-60s of the 20th century, studies in Comparative Education focused mainly on comparisons between nations and a few comparative research at the level intranational. This situation was justified by Bereday, primarily as an intellectual matter, inasmuch as "men study [the] foreign systems, simply because they want to know, because they will always thirst for enlightenment" (BEREDAY, 1972, p. 31, our translation).

For Bereday, the first methods of Comparative Education emerged in the 19th century. This author considers that, at first, Comparative Education had three phases: a "loans" phase, whose focus was to catalog descriptive educational data and transplant best practices from one country to another; a second phase, already in the 20th century, of "transplantation" (or "prediction"), initiated by Michael Sadler and who considered that educational systems are not easy to separate, but closely linked with the society that support them, causing always a reciprocal relationship between society and education. The third phase, on the other hand, was named by Bereday as the "analysis" phase, whose main representatives would be Shneider, Kendel and Ulich, who defined it as a means (and objective) of creating unity in the world.

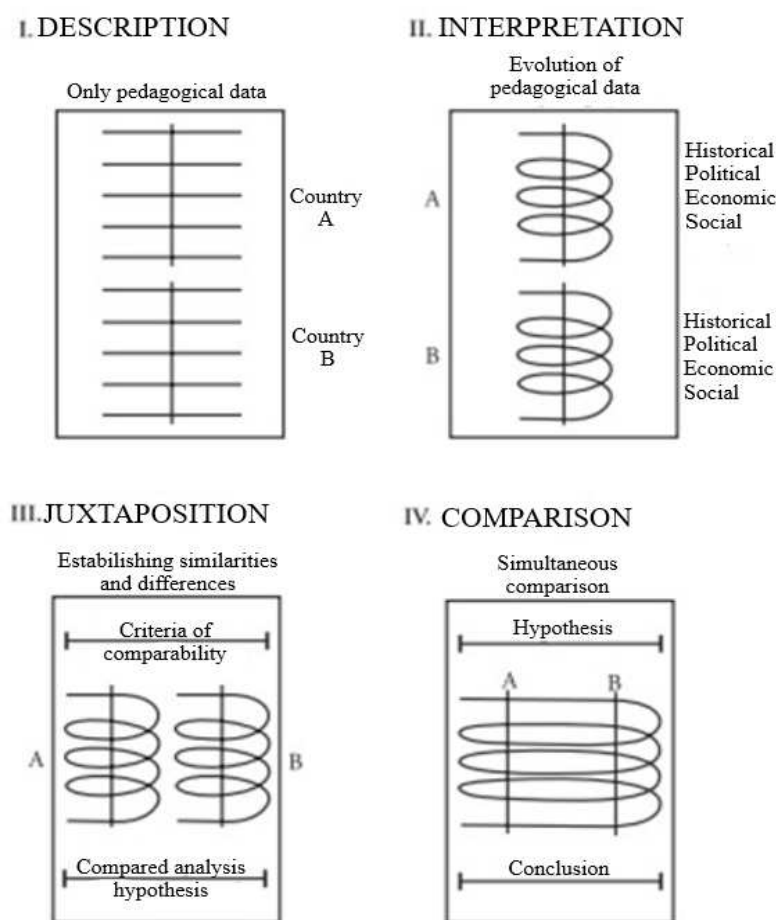
Bereday considers that this last phase, that of "analysis", poses very similar questions with the phase of "prediction" (in the sense of prescription), and that the first phase, the phase of "loans" can only be verified after a minimal systematization of national education practices. However, for Bray, Adamson and Mason (2015), not all comparativists agreed with this kind of "classification" proposed by Bereday.

Even among those who eventually accepted it, not all were necessarily convinced that the steps were sequenced in such a way that the prediction period followed and shifted the loan period and that, in turn, the analysis period followed and shifted the period prediction (BRAY; ADAMSON; MASON, p. 28, 2015, our translation).

In addition to this historical classification elaborated by Bereday, what we consider most important of his contributions is the very method of conducting research in Comparative Education. However, before the methodological steps, Bereday considered that to carry out good research in Comparative Education (and, in this case, also international), the researcher should have three attributes: living a significant period in the country where he sought comparison, mastering the language of that country and divest himself of his prejudices, especially social and cultural prejudices.

From then on, it would be up to the researcher to make use of the method proposed by Bereday, which consisted of 4 (four) steps, namely: description, interpretation, juxtaposition and comparison itself, graphically demonstrated in the next illustration (Figure 2). It is necessary to emphasize that this division into four stages should be seen more in a didactic sense than as separate stages of the same research.

Figure 2 – Bereday model for conducting comparative studies



Source: Bereday (1964, p. 28)

According to Bereday (1972), the Comparative Education method follows the premise that educational facts are deeply associated with social facts, that is, the reality of the country to be analyzed is intrinsically related to the quality of education in that country. Thus, Bereday considers that research in Comparative Education necessarily has an interdisciplinary vision. At the same time, “Comparative Education is a political geography of schools. Its task, to be carried out with the help of methods from other sciences, is to look for lessons that can

be deduced from the variations in educational policy in different societies” (BEREDAY, 1972, p. 19, our translation).

Also according to Bereday (1972), Comparative Education aims to find the differences and similarities between national education systems, and, for that, it needs to go beyond educational borders, each country being a variant of a total, all of which can be beneficiaries of findings (and experiences) found in other countries. In this sense, and still according to Bereday (1972), it is only when we understand the other that we manage to understand ourselves, with a less ethnocentric posture of observation and considering the historical and cultural multiplicity of peoples.

For Bereday (1972), when the researcher detaches himself from his prejudices and personal tastes, he becomes impartial, not affecting his judgment and his consequent analysis of the collected data. After collecting the data, it is necessary to organize such data and know what to do with them. Bereday (1972) explains that data can be organized in tables or using other methods, for example, cartographic ones.

The second stage proposed by Bereday (1972) is the interpretive stage, or the interpretive study, in which the political, social and economic history of the compared countries must be viewed. For this author, the interpretation stage primarily means "subjecting the pedagogical data to scrutiny in terms of other social sciences" (BEREDAY, 1972, p. 48, our translation). If facts can be present in the first stage (description), it is in this second stage they must be interpreted, with the help of the various social sciences since the interrelationships between school and society are numerous.

The third stage, the juxtaposition stage, aims to establish "the criterion that allows a valid comparison to be made", as well as the establishment of the comparison hypothesis (BEREDAY, 1972, p. 9, our translation), or, in other words, in order to make a comparison possible, it is necessary that, at least, there are factors in common. Although apparently redundant, we would say that it is only possible to compare what can be compared.

Bereday (1972) considers that the comparison actually starts at this stage, as it is at this point that it becomes possible to perceive concepts and raise hypotheses. The data previously collected is used, such data are confronted with the themes addressed, and thus we begin the search for the less common features between the compared systems, that is, the search for the specificities of each national education system.

The fourth and last step proposed by Bereday (1972) is the step of comparison itself. This step consists of the simultaneous analysis of the national education systems, based on the data collected from each of them, their historical, social, economic and, mainly, cultural

contextualization, followed by the interpretation of the contexts (national education systems of the countries) chosen, from the juxtaposition of these two (or more) contexts, resulting in the evaluation, understood as the identification of similarities and differences between them.

Thus, after the hypothesis was raised in the juxtaposition, the comparison between the national education systems of the chosen countries now takes place sequentially and simultaneously. According to Bereday, this is the most difficult time, as it is the time when it is necessary to cross-reference information, in the sense that we have to abandon our habit of thinking in national terms and start thinking in international terms, crossing and re-crossing borders (BEREDAY 1972, p. 52).

However, at the same time, this last stage, the stage of comparison itself, also requires a separation into two parts, the first being the approach to the problem and the second the approach to the totality. Thus, a first partial approach is complemented by a second, more global approach to the problem (situation, context etc.). We start from a point that the researcher considers to be important and from it the persistence and variability of the same in all other systems used by comparative research are examined (BEREDAY, 1972).

Finalizing this approach, we will make use of some considerations from Bonitatibus (1989). This author considers that Bereday's methodological proposal allows him to be considered a positivist author, as he focuses on the Comparative Education method (or the importance of Comparative Education) in the analysis of educational problems, which Bereday called "focus of problems". Bonitatibus, reading Bereday, explains this "problem-focusing" idea as follows:

The issues to be investigated must be important and urgent. Although the question of importance and urgency of a given problem is itself a subjective question, what Bereday proposes is that the problem be chosen in such a way that the study allows us to broaden our horizon and knowledge of a given educational reality, offering us consistent information and contributing to the improvement and improvement of educational systems (BONITATIBUS, 1989, p. 64, our translation).

The same author, Bonitatibus (1989), also considers that Bereday's (1972) proposal has a functionalist aspect in the sense that educational problems, as well as the school (understood as a social institution) are directly (and intrinsically) related to the society in which the school itself is inserted, a society composed of different social layers.

Thus, the comparison (or research and studies in Comparative Education) is the final analysis, where we will find (or not) similarities and differences, or approximations and distances, between the national education systems of different countries, elucidated by the

“highlighting of educational data previously collected and processed” (BEREDAY, 1972, p. 52, our translation).

Final considerations

This article aimed to outline the research method in Comparative Education proposed by George Bereday and to clarify some opinions about it, starting from some commentators such as Nóvoa, Bray and Thomaz, Bonitatibus and Lourenço Filho, among others, because we understand that all these authors can contribute to a better understanding of what comparative education is and how to carry out research and comparative studies in the field of education.

The Comparative Education map drawn up by Nóvoa (2010) has as its premise to understand the various trends at different times in history, contemplating in each part of it a set of authors who collaborated for that particular period according to the author's own vision, as well as helps us to situate (this is the meaning of the map) the main authors and commentators on Comparative Education in the contemporary world.

The Bray and Thomaz (1995) cube, in turn, by being separated into faces and levels, facilitates the search for research objects in Comparative Education, as well as their validation, in addition to enabling (and visualizing) the comparison between international (educational issues present in different nations) or intranational (educational issues within each country).

Finally, Bereday presents us his research method in Comparative Education, divided into four main stages: description, interpretation, juxtaposition, and comparison itself. Respecting these stages, as well as stripping ourselves of our prejudices, mastering different languages and having the possibility of living in other countries, we will be, according to Bereday (1964), ready to carry out the most varied research in the field of Education, starting from the methodology of Comparative and International Education, an area academically as rich as it is little explored by intellectuals in Brazilian education.

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