

**WORLD YEARBOOK
OF EDUCATION 1999**

INCLUSIVE EDUCATION



Harry Daniels and Philip Garner

**WORLD YEARBOOK
OF EDUCATION 1999**

INCLUSIVE EDUCATION

**WORLD YEARBOOK
OF EDUCATION 1999**

INCLUSIVE EDUCATION

Edited by
Harry Daniels and Philip Garner

Series Editor:
Crispin Jones



 **Routledge**
Taylor & Francis Group
LONDON AND NEW YORK

YOURS TO HAVE AND TO HOLD

BUT NOT TO COPY

First published in 1999 by Kogan Page

Apart from any fair dealing for the purposes of research or private study, or criticism or review, as permitted under the Copyright, Designs and Patents Act 1988, this publication may only be reproduced, stored or transmitted, in any form or by any means, with the prior permission in writing of the publishers, or in the case of reprographic reproduction in accordance with the terms and licences issued by the CLA. Enquiries concerning reproduction outside these terms should be sent to the publishers at the undermentioned addresses:

This edition published by Routledge 2012

2 Park Square 711 Third Avenue
Milton Park, Abingdon New York, NY 10017
Oxon OX14 4RN

First issued in paperback 2012

Routledge is an imprint of the Taylor & Francis Group, an informa business

© Harry Daniels and Philip Garner, 1999

The right of Harry Daniels and Philip Garner to be identified as the authors of this work has been asserted by them in accordance with the Copyright, Designs and Patents Act 1988.

British Library Cataloguing in Publication Data

A CIP record for this book is available from the British Library.

ISBN 0 7494 2237 8

Typeset by Kogan Page

Contents

List of contributors	vii
Acknowledgements	ix
Introduction <i>Harry Daniels and Philip Garner</i>	1

SECTION I: DEFINING SPECIAL EDUCATION IN A DEMOCRACY – INCLUSIVE EDUCATION

1. Inclusive education: a requirement of a democratic society <i>Dorothy Kerzner Lipsky and Alan Gartner</i>	12
2. Individual rights to education and students with disabilities: some lessons from US policy <i>Margaret J. McLaughlin, Lynn Fuchs and Michael Hardman</i>	24
3. Inclusion and inclusions: theories and discourses in inclusive education <i>Alan Dyson</i>	36
4. Market ideologies, education and the challenge for inclusion <i>Len Barton</i>	54

SECTION II: DILEMMAS FOR INCLUSIVE EDUCATION

<i>Systems in Reformulation</i>	
5. England and Wales: competition and control – or stakeholding and inclusion <i>Gary Thomas and John Dwyfor Davies</i>	64
6. Deficit ideology and educational reform in the United States <i>Christopher Blake</i>	74
7. The Netherlands: supporting integration by re-directing cash-flows <i>Sip Jan Pijl and Cor Meijer</i>	82
8. Integration in the changing Scandinavian welfare states <i>Anders Gustavsson</i>	92
9. The inclusion movement in Canada: philosophies, promises and practice <i>Margret A. Winzer</i>	99
10. Spain: responses to inclusion in autonomous regions <i>Angeles Parrilla</i>	107

Systems in Change

- | | |
|----------------------------------------------------------------------------------------------------------------------------|-----|
| 11. Towards a healing society: perspectives from Japanese special education <i>Gerald K. LeTendre and Hidetada Shimizu</i> | 115 |
| 12. Issues of inclusive education in the Czech Republic – a system in change <i>Marie Cerná</i> | 130 |
| 13. Bulgaria: gypsy children and changing social concepts of special education <i>Diana Tzokova and Zlatko Dobrev</i> | 138 |

Systems in Development

- | | |
|---------------------------------------------------------------------------------------------------|-----|
| 14. Developing inclusive education in Chile: private versus public systems <i>Maria Baez</i> | 148 |
| 15. Inclusive education in South Africa: achieving equity and majority rights <i>Pam Christie</i> | 160 |
| 16. Pedagogic discourse and academic failure in southern Brazil <i>Magda Damiani</i> | 169 |

SECTION III: DIALOGUES ON INCLUSIVE EDUCATION

- | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------|-----|
| 17. The welfare state and individual freedom <i>Jesper Holst</i> | 180 |
| 18. Policies and practices? Inclusive education and its effect on schooling <i>Roger Slee</i> | 194 |
| 19. Racism, ethnic identity and education of South Asian adolescents <i>Paul A. S. Ghuman</i> | 207 |
| 20. Globalization and cultural transmission: the role of international agencies in developing inclusive practice <i>Peter Evans</i> | 229 |
| 21. Exclusion: the middle classes and the common good <i>Sally Tomlinson</i> | 238 |
| 22. Advocacy, self-advocacy and inclusive action: a concluding perspective <i>Jo Lebeer, Roberta Garbo, Peetjie Engels and Annet De Vroey</i> | 252 |

- | | |
|-------|-----|
| Index | 267 |
|-------|-----|

Contributors

Ms Maria Baez, University of Newcastle, England
Professor Len Barton, University of Sheffield, England
Professor Christopher Blake, Towson University, Maryland, USA
Professor Marie Cerná, St Charles University, Prague, Czech Republic
Professor Pam Christie, University of the Witwatersrand, Johannesburg, South Africa
Dr Magda Damiani, University of Pelotas, Rio Grande de Sul, Brazil
Professor Harry Daniels, University of Birmingham, England
Mr John Dwyfor Davies, University of the West of England, Bristol, England
Professor Zlatko Dobrev, University 'St Kliment Ohridsky', Sofia, Bulgaria
Professor Alan Dyson, University of Newcastle, England
Peetjie Engels, Student in Care-Giving for the Elderly, Schinnen, The Netherlands
Dr Peter Evans, Organization for Economic Co-operation and Development, Paris
Professor Lynn Fuchs, Vanderbilt University, USA
Roberta Garbo, Vice President, Association of People with Downs Syndrome, Milan, Italy
Dr Philip Garner, Brunel University, London, England
Professor Alan Gartner, Graduate School and University Center, City University of New York, USA
Professor Paul Ghuman, University of Wales, Aberystwyth, Wales
Professor Anders Gustavsson, University of Stockholm, Sweden
Professor Michael Hardman, University of Utah, USA
Professor Jesper Holst, University of Copenhagen, Denmark
Professor Jo Lebeer, University of Antwerp, Belgium
Professor Gerald LeTendre, Penn State University, USA
Professor Dorothy Kerzner Lipsky, Graduate School and University Center, City University of New York, USA
Professor Margaret McLaughlin, University of Maryland, USA
Dr Cor Meijer, Institute of Educational Research SVO, The Hague, The Netherlands
Professor Angeles Parrilla, Universidad de Sevilla, Spain

Dr Sip Jan Pijl, Institute for Educational Research, University of Groningen, The Netherlands

Professor Hidetada Shimizu, Northern Illinois University, USA

Professor Roger Slee, University of Western Australia, Nedlands, Australia

Professor Gary Thomas, University of the West of England, Bristol, England

Professor Sally Tomlinson, Goldsmith's College, University of London, England

Dr Diana Tzokova, University 'St Kliment Ohridsky', Sofia, Bulgaria

Annet De Vroey, Co-ordinator, 'Project Mentor', Antwerp, Belgium

Professor Margret Winzer, University of Lethbridge, Canada

Acknowledgements

A number of people have assisted in the compilation of this book. First of all, however, we would like to thank our contributing authors and those who have informed their writing. The production of chapters frequently has to take second place to other official duties and we are grateful that each of our contributors has found the time to write, thus providing a set of chapters which illustrate the range and complexity of Inclusive Education. Indirectly, too, we thank the diverse populations who are the focus of this book.

We would also like to express gratitude to various colleagues within our own institutions who have offered assistance at a variety of levels: administrative, intellectual or emotional. Amongst these, special thanks must be offered to Jac Eke, who reformatted the initial contributions, and to Adrian Ellis, who freely gave his expertise on PCs and email when requested. Moreover, we wish to recognize that our own institutions have provided each of us with the necessary flexibility in our academic commitments to work on this volume.

Finally, our gratitude is extended to the Series Editors, Crispin Jones and David Coulby, for their advice and encouragement and, in the latter stages of our own editing, for their patience in awaiting the final draft of the manuscript. More importantly, we wish to acknowledge their foresight in identifying Inclusive Education as a title within the Yearbook series and their commitment to the project.

Introduction

Harry Daniels and Philip Garner

This book is concerned with the relationship between the theory and practice of inclusion, and the broader social and political contexts to which the concept has been applied. It explores a range of matters in relation to the spatial and incremental differentiation by which the development of inclusive practices can be mapped across an international context. The reader is provided with a glimpse of the complexity of the issues that confront educationalists, and those who work alongside them, who seek to foster the process of inclusion in a wide range of political, economic, cultural and social settings. The aim is to contribute to a debate that is arguably still in its infancy, and that is defined by paradox or axiom, in the relationships between democracy and disability. More particularly, the collection of essays seeks to explore comparative interpretations of those individual rights and freedoms by which people with disabilities, difference and special educational needs¹ are supported within education systems.

The development of democracy, by definition, involves increasing levels of participation in social and political life. To subscribe to some form of democratic ideal is, then, to have an aim to include all people in the development of civil society. Whilst much has been written about inclusion in relation to education, particularly in the United States and in Western Europe, the term may be constructed to assume a broader focus than disability and difficulty in education alone. Processes of what may be seen as inclusion may be associated with large-scale political, economic and social change, as in the context of oppressed and disfranchised groups in countries such as South Africa, Brazil, Germany or Australia. A similar conceptualization might be applied to many of the emergent democracies in the central and eastern parts of Europe. Defined in these terms, the concept of 'inclusion' may be viewed as applicable in a global dimension, irrespective of the 'stage of development' reached by a country; this may be designated against a set of operative criteria or dimensions.

Whether the focus is within education or beyond, the term 'inclusion' implies a form of change that is different from that implied by the term 'integration'. There remain tensions and dilemmas – between a focus on changing individuals to fit existing systems, and changing systems in order that endemic and often subliminal practices of exclusion and marginalization are avoided. For example, if a system is changed in order to avoid exclusion, it

may not necessarily be adept at reintegrating those who have formerly been excluded; indeed, there is adequate evidence, at local, regional, national and international levels, that the promise of such endeavours results in little more than the re-definition, followed rapidly by the re-marginalization, of the target group(s). Processes of exclusion and marginalization create and sustain ways of being that are both social and deeply personal, whilst remaining distinctly resistant to ideological and structural change. Thus, within the local-state, practitioners may articulate a reality gap between their own grassroots aspirations and those of policy-makers. The belief-systems and operations of the practitioners themselves may, to an even greater extent, be isolated or fractured from those of the fundamental actors in the scenario – the marginalized or disengaged individuals and groupings themselves. The unique consequences of the experience of marginalization carry with them challenges for the creation of a more inclusive system. And they will have a differential impact on all those involved, irrespective of their level of commitment.

An important element in the political discourse of education in many countries is concerned with the development of accountable systems. Discussions of cost-effectiveness may be cast against particular goal frames relating to national policy. But, increasingly, globalization is ensuring that such localized initiatives are required to be placed within an internationalist framework. At the same time, they are required to ensure that the individualistic requirements of the post-modern nation-state remain intact. In part, this book is concerned with how those goal frames – the local political, cultural, social, moral and economic imperatives – achieve definition and microcosm within education. Goal frames may have a macro or micro focus, and the tensions inherent in systems that are overly dependent on either of these orientations have become apparent within special education since the publication of the 1993 *World Yearbook* (Mittler, Brouillette and Harris, 1993). Arguably, the tumultuous political developments in Central and Eastern Europe, and the recognition that financial irregularities in another hemisphere have certain predictable impacts on economic systems previously seen as immune to international perfidy, have subsequently provided a counterbalance to 'global individualism'. Thus, whilst emergent or established nation-states have sought to define their unique qualities against globally determined sets of indicators, they have done so in recognition of the contexts within which they function. As in other policy formulations, those countries that conceptualize, construct and subsequently operationalize inclusive education on a narrow or parochial dimension may ultimately find that the grassroots effect may be nominal, or even counter-productive.

Irrespective of scale or location, however, the means by which the boundaries between those who are able to exercise some control over their life, and those who cannot, reflect relations of power. It is the readjustment of these relations of power that is often so difficult – both to conceptualize and to operate. Superficial adjustments may infer power shifts and subsequent

re-directions of policy and practice. However, all too often, observation of actual practices suggests that many 'adjustments' assume a rhetorical position, and lack impact. Such rhetoricism is equally apparent on an international and national dimension. Thus, successive resolutions within global conventions designed to protect individual rights and autonomy have been unilaterally recognized on a global dimension. At a more local level, such innovative and ultimately praiseworthy initiatives bear little cause for close scrutiny. The lack of voice leading to marginalization and social exclusion is witnessed too often in systems that announce a commitment to empowerment, but lack the political will to ensure that rhetoric becomes reality. Token and rhetorical responses to initial concerns, leading to policy statements that make little or no impact on the lives of children, are all too frequent. This applies equally to countries at very different stages of development, and is by no means the sole domain of those nations seeking to establish a political and economic footing within the global order of things. A particular example of this may be seen in the general difficulty in including children in debates about possibilities for their own education, a process that the education system of England and Wales, for example, has only recently begun to recognize as an indicator of its effectiveness. Whether in 'systems in transition', 'in change' or 'in development', there is much talk of 'listening to children', but much evidence of official 'hearing impairment'.

Globally, such remarks are descriptive of many systems of general education, but it is within special education that these arguments are most vibrantly circulating; and they have been doing so since the beginning of the 1990s. The concept of 'inclusion' is by no means new (Thomas, Walker and Webb, 1998) – its roots have been sown by a succession of educationists and philosophers throughout the twentieth century – but it is the recent widespread and increasingly vociferous demand to establish individual rights as a central component in policy-making that has provided the impetus to place inclusion firmly on the agenda of social change.

Whilst, in some locations policies of supposed 'inclusion' fail to progress beyond rhetoric, others creditably may be seen to contradict parallel aspects of national social policy. One example of such a contradiction between individual social policy directions occurs in Romania. There, attendance at special school carries with it a number of welfare benefits, such as allowances for transport and clothing. These economic benefits act as a significant disincentive to parents who, given a more advantageous economic framework, would prefer to see their children educated in a mainstream setting; this situation is replicated in numerous other countries, frequently irrespective of their stage of development. The perceived benefits of local community schooling have to be weighed against the costs of loss of benefits and social support. This is just one example indicating the complication of the often contradictory messages presented by legal and welfare systems to parents, children, and to those who are in a position to formulate policy.

There are, of course, limits to the extent to which inclusion can be seen as a context-independent movement. There is an inextricable link with economic, political and cultural underpinnings, and this will readily be apparent in the reading of this volume. The book draws on the experience of a diverse range of nations, each with its own strengths and dilemmas. The writers are located in very different political contexts and thus express different concerns and dimensions regarding some of the constituent elements of inclusion as a social and educational movement.

The diversity of the country-specific descriptions is itself an indication of the necessity for the term 'inclusion' to be constructed within a framework of pre-existing conditions. At the same time, however, the ultimate goal may be something approximating to the framework given definition within the *Salamanca Statement* (UNESCO, 1994). What is also clear is that, even in the majority of post-industrial nations, the actual practice of inclusion is often only an adumbration of the ideal state charted in that resolution.

Within this book, this embedding in local discourse is relayed in the terms used by the various contributors, which vary as a function of linguistic difference and/or social/political contexts. For example, 'handicapped' is used by Scandinavian writers as a term embodying the social consequence of disability, rather than a term of denigration, with a focus on individual deficiency. It is important to recognize that semantic confusion can lead to misunderstanding; similarly, English-language translations may obfuscate the real issue. It has not been our wish, as editors, to restrict or condition by standardization the terminology of our contributors. Indeed, the cultural and historical antecedents of the development of particular forms of political correctness are a subject of study in their own right, although outside the immediate remit of this book (Corbett, 1995).

We have chosen a structure of three parts:

1. Part One: Defining Special Education in a Democracy – Inclusive Education;
2. Part Two: Dilemmas for Inclusive Education; and
3. Part Three: Dialogues on Inclusive Education.

Part One is concerned directly with the interplay between political and economic environment and the possibilities for the development of the concepts of special and inclusive and inclusion education. In the last *World Yearbook* concerned with special education, Chapter 20 was entitled 'The future of special education: who will pay the bill'. Ron Brouillette's discussion of economic constraints and incentives prompted us to think about the need for an extended discussion of the ways in which cultural forms such as special and inclusive education enter into the local official discourses concerning the welfare state and the 'market' (Brouillette, 1993). The conditions of democracy and post-industrial economic life, which provide the context in which so much of the discussion of 'inclusive education' takes place, are by no means

universal. The development of democracy itself may be seen to condition the possibilities for, and imperatives of, what was special education, and what may become universal inclusive education.

The development needs of newly emergent democracies relate as much to democratic goals themselves as to the economic conditions that underpin development. Changes in economic circumstances certainly affect resource capabilities, and may well affect the perceived desirability of particular forms of social action. Alan Gartner and Dorothy Kerzner Lipsky explore the wider implications of this theme in the opening chapter. The implication, from their writing, is that democratic operations are the essential premise for establishing inclusivity – including the capacity to vote for financial policies that will ensure its practical operation. That the process of inclusion is embedded in national policy orientation is a requirement amplified by Margaret McLaughlin, Lynn Fuchs and Michael Hardman, who make pointed reference to the somewhat prophetic OECD indicator that ‘There should be only one comprehensive social policy’. To define a different set of statutes for those with disability, they argue, serves only to illustrate and expose exclusivity.

Alan Dyson argues a theory of ‘multiple inclusions’, based on a set of contrasting discourses. The reader will recognize the difficulties inherent in Dyson’s challenge. On the one hand, we are at a relatively early stage in defining and articulating inclusive practices – however long its philosophical pedigree might be. Yet, contrastingly, there has been a reinforcement of post-modern individuality based upon culture and history. The tension between establishing newly inclusive operations in erstwhile exclusive societies will, crucially, be conditioned by national identity and future vision. As Dyson suggests, broad and open debate must ensure that inclusion does not become simply a slogan.

Democratic principles have most recently become conditioned by economic reality in a number of locations world-wide. Individual expression, personal freedoms and the rights that provide a framework for their realization have been placed in jeopardy in a new era of economic angst. The global growth of a commitment to inclusive education has corresponded with a rise in self-doubt and financial uncertainty in many countries. Preservation of the old order required a revisionist intake of breath and a major question mark over resource direction. This provides the theme for Len Barton’s chapter, which concludes the opening part of the book.

In Part Two we have invited our contributors to outline and provide commentary on what they regard as the key issues and national concerns of attempts to formulate and promote inclusive practice. Our selection of contributors was, in part, driven by an, albeit crude, categorization of educational contexts, as follows:

Systems in reformulation: countries where there has been a tradition of universal education in mainstream and special schools, and there are debates about

the development of inclusive education, which relate to the reformulation of national educational provision for those with learning difficulties. A component of such debates is the shift away from segregated provision and the emergence of education as a market-led component of social policy. Within the latter, reformulation brings to these countries and regions an ever-increasing need to justify expenditure on welfare and education, with a commensurate discourse underpinned by the twin imperatives of financial expediency and political pragmatism.

Systems in change: countries that are undergoing significant political, social and/or educational change. Again, in these locations, universal education has long been established, with provision in mainstream and special schooling. What identifies this grouping as distinct is the far-reaching ideological and structural change that has taken place during the last few years, and their initial exposure to education and welfare systems demarcated by individual rights and freedoms.

Systems in development: countries that are in the process of developing schooling for all. Here, formal educational provision for those with learning difficulty remains separate, and the debate concerning inclusion is taking place at a time when state systems are trying to realize effective basic, segregated provision. These are countries and regions that, as a result of economic and political factors, usually relating to their spatial location, are in the process of a bilateral definition of special education, in terms of the reality of ensuring provision *per se*, and future conceptual planning that recognizes the principles of inclusion.

These groupings provide for something beyond a country-by-country treatment of the national characteristics of inclusive education. In a broad sense, it is a fairly intuitive and highly personalized attempt to suggest that the term inclusion can often be paradoxical, and that, in many ways, discontinuities are not always a configuration of a country's location, ideology or infrastructure; and, further, that in each grouping there is ample evidence of successful inclusionary practice. This may suggest that one of the positive impacts of globalization is the refinement, within special education practice, of transmission models: the traditional concept of 'borrowing', as applied particularly when considering north and south hemispheres or, more regionally, East and West Europe, or North and South America, has changed. Whilst there is a contradictory argument, powerful indications exist to suggest that the movement towards inclusion is premised by collaborative development, particularly that promoted by international or regional agencies. Arguably, this is one of the defining characteristics of the movement; other educational or welfare initiatives may accrue marked benefit from examination of it.

The comparative study of disability in an educational context has had a very short pedigree. In many ways this volume represents a first major shift in direction in international studies, by confirming the movement away from a

special education *per se* focus to one that explores inclusive education. The brief period of development of comparative study in the former area was, arguably, heralded by Barton and Tomlinson (1984), who called for an extension of interest in studies of this kind, with a neatly prophetic advisory note to future authors that '...it is important to analyse changes and developments in special education in some kind of a comparative perspective, to avoid assuming that developments in one country are the norm' (p 5). Certainly, this advice remains essentially current, with particular regard to post-industrial nations, whose inclination is to assume that the level to which they have refined, for instance, issues of service delivery, are far more appropriate and effective in meeting identified need. Whilst there may be a notional case for this assumption, our experience is that many countries falling outside, for example, the OECD, can often provide exemplars of inclusive practice, a feature demonstrated by Booth and Ainscow (1998).

The fifteen years following Barton and Tomlinson's observation have seen a gradual but steady rise in an interest amongst academics and theorists in drawing parallels and comparisons in special education on an international scale. Thus, volumes containing collections of accounts of special education practice from a range of countries have become more widespread: Mazurek and Winzer (1994), Mittler and Daunt (1995), and Artiles and Hallahan (1996) have all made significant contributions to this developing field. Moreover, it has become increasingly common for writers to use international comparisons when exploring policy issues in special education, as classically illustrated by Fulcher (1989). These developments were paralleled by a perceptible increase in contributions from special educationists to international conferences and to comparative education journals. The continued popularity and influence of such dedicated special education journals as the *European Journal of Special Needs Education* in the 1990s, as well as the further growth of international or regional associations (of both professionals and advocates), is further evidence of the vitality of this area of study. Most recently, there has also been some re-orientation in comparative studies of special education: in keeping with national trends, and influenced by the global move towards claiming empowerment and individual rights, inclusive education *per se* has become firmly established in a comparative context. Pijl, Meijer and Hegarty (1997) and Booth and Ainscow (1998) exemplify this shift, and there is now a dedicated academic periodical in the field, the *International Journal of Inclusive Education*.

It is one of our anticipations in the construction of this volume that it might provide further '...new insights from international comparisons that will assist in the process of finding solutions for common problems' (Pijl, Meijer and Hegarty, 1997). However, in attempting this, we have exhorted our contributors to move beyond what can best be summarized as 'level one' comparison, in which descriptions (of legislation, organization and practice) are accompanied by a (usually) neo-conservative commentary. Studies like this, as Pijl,

Meijer and Hegarty (1997) have pointed out, generally offer little that is surprising and are inclined to be repetitive, almost as if devoid of context. This volume seeks to avoid this by asking chapter-authors, in Part Two, to identify an overall theme around which the dilemmas and potentials of inclusion can be discussed, whilst making particular reference to the ideological embedding that proscribes them. Thus, there will be only a notional treatment of the structural features of national educational systems, and the special provision available within them.

In sum, writers have been given an open brief to provide an intuitive response to those concerns regarding inclusion that are currently apparent in their own location. The resulting commentaries take us back to a broadening view of the term inclusion, the chapters representing diverse constructions of its principles, meanings, practical impacts and future relevance.

The selection of countries included in Part Two was based on a very loose interpretation, at the planning stage of this volume, of the perceived current conceptual and practical position obtaining in a given country location. Somewhat perversely, moreover, there was no intention at the outset to provide an 'inclusive' treatment, even at a regional level. This was a pragmatic decision, based on what might be seen as the locational uniqueness of an inclusive practice. Indeed, we have already highlighted the dangers of homogeneity in a matter which, as Alan Dyson has described in this volume, is as theoretically diverse as inclusion. For many of the countries in Part Two, the selection was accomplished in an almost context-free manner. However, each of us has some familiarity and previous or ongoing professional involvement with colleagues, institutions or government agencies in many of the others.

Within Part Two the reader will encounter a diverse set of themes mapped on a national or regional basis. Some of these will be highly particularized, as with the tensions between federalism and nationalism (Canada, Spain), the inclusion of specific minorities (gypsy children in Bulgaria), and new majorities (South Africa). Elsewhere, there is evidence of the debate between securing democracy and the economic cost of sustaining it (for example, the Czech Republic), and of the tension between the individual and the state (Japan, United States of America). Thus, whilst individual authors in this part of the book write from a national perspective, the collective, it could be argued, broadly defines the terms of reference for the ongoing ideological debate concerning the efficacy of inclusion.

In Part Three we asked individual authors to take up a position in respect of the relationships and tensions emerging from Parts One and Two. Again, in recognition of the broad framework within which we have considered inclusion, the selection of themes is almost inevitably incomplete. Nevertheless, the chapters offer insights into concerns that, as the country reports illustrate, are dynamic and are spatially constructed. The dilemmas inherent in balancing welfare intervention against personal advocacy are considered by Jesper Holst, who gives recognition to one of the frequently overlooked, and cer-

tainly underwritten, concepts underpinning inclusive practice in education. This is the concept that those towards whom policy has traditionally been directed are a resource, and need to be accommodated centrally within policy formulation. Such is the importance of this aspect of inclusion that we have chosen to identify it as the concluding theme of this *Yearbook*.

Roger Slee examines the nature and implications of the gap between inclusive policy and its implementation. In particular, he explores aspects of the context-bound nature of inclusion, thereby echoing Dyson's overview of the multidimensional nature of the term. Importantly, Slee sees the debate as essentially one in which the characteristics of 'inclusions' might be pro-actively established around a set of propositions. Defining each term, therefore, is more about refining what it is, rather than what it is not.

In contrast, Paul Ghumann particularizes the dilemmas inherent in such an interpretation; he considers the extent to which one frequently marginalized population might be the recipient of forms of 'multiple exclusions' – racial, social, educational and economic – so that a non-inclusive identity is maintained or consolidated. In some senses, we hope that a focus on the underachievement–ethnicity interface illustrates that inclusion itself cannot be viewed as the particular domain of those with learning difficulties *per se*. Peter Evans articulates this notion in his commentary from an international perspective, arguing that, whilst the work of such organizations as the OECD is guided by a philosophy of 'human rights and social justice', its focus and application vary according to location.

Can the movement towards inclusion in education act as an agent of social change? This question is central to Sally Tomlinson's thesis. Inasmuch as education is projected as a mirror of the society of which it is a function, such reflexivity may extend to education (and notably inclusive education) as a model for redefining individual actions to secure social justice.

Finally, some of the practical implications of including children, young people and adults with learning difficulties are mapped by Jo Lebeer and his co-contributors. In identifying this theme as a concluding chapter we encountered a dilemma. Does its own inclusion, as a discrete chapter, resemble both the exclusive practice and unwanted tokenism that this *Yearbook* seeks to critically examine? The message it contains, we believe, far outweighs the sensibilities of two editors.

The fledgling debate about inclusive education has provided ample evidence of the need to adopt approaches that are flexible, dynamic and responsive to individuals within localized spatial contexts. This presents a huge challenge. Inclusion has to be viewed in a multidimensional way (in spite of the broad sweeps provided by policy statements by international organizations), which allows for individual autonomy within corporate, national actions. The very fluidity required to accommodate these variants as a global movement may prove to be counter-productive and not in the best interests of those with disabilities. Initiatives based upon personally articulated state-

ments of need are as central a part of inclusion as are the policies and structures that are most commonly used to define it. As we approach the beginning of a new century, it would seem essential that the educational debate should be broadened from its somewhat parochial origins (as viewed by participating professionals). Thus, not only is there a need to define its terms of reference from a point beginning with those most pivotal to and affected by the process, but also this involvement should be quantifiable in terms of 'outputs': that one of these indicators might be the removal of the prefix 'inclusive' from education might signal a more substantive and democratic application of the term.

Endnote

1. We recognize that such terms are problematic. Throughout the text we, as editors, have retained those terms which individual contributors regard to have a local legitimacy.

References

- Artiles, A. and Hallahan, D. (eds) (1996) *Special Education in Latin America: Experiences and Issues*, Praeger, Westport, Conn., and London
- Barton, L. and Tomlinson, S. (eds) (1984) *Special Education and Social Interests*, Croom Helm, Beckenham
- Booth, T. and Ainscow, M. (1998) *From Them to Us. An International Study of Inclusion in Education*, Routledge, London
- Brouillette, R. (1993) 'The future of Special Education: Who will pay the bill?', in P. Mittler, R. Brouillette and D. Harris (eds) *The World Yearbook of Education. Special Needs Education*, Kogan Page, London
- Corbett, J. (1995) *Bad Mouthing: The Language of Special Needs*, Falmer Press, London
- Fulcher, G. (1989) *Disabling Policies? A Comparative Approach to Education Policy and Disability*, Falmer Press, London
- Mazurek, K. and Winzer, M. (eds) (1994) *Comparative Studies in Special Education*, Gallaudet University Press, Washington
- Mittler, P. and Daunt, P. (eds) (1995) *Teacher Education for Special Needs in Europe*, Cassell, London
- Mittler, P., Brouillette, R. and Harris, D. (eds) (1993) *The World Yearbook of Education. Special Needs Education*, Kogan Page, London
- Pijl, S. J., Meijer, C. and Hegarty, S. (eds) (1997) *Inclusive Education: A Global Agenda*, Routledge, London
- Thomas, G., Walker, D. and Webb, J. (1998) *The Making of the Inclusive School*, Routledge, London
- UNESCO (1994) *The Salamanca Statement and Framework for Action on Special Needs Education*, UNESCO, Paris

Section I

Defining special education in a democracy – inclusive education

1. Inclusive education: a requirement of a democratic society

Dorothy Kerzner Lipsky and Alan Gartner

Introduction

It is not common to address the topic of inclusive education in the context of democracy or within the broad ambit of social policy. We do so in recognition of the limits of our understanding, and particularly of the constraints of our own cultural and ideological perspectives. While we have both had the opportunity to study and work in a number of countries, it is the fact that we are North Americans, and our experience of education in the United States, that shape (and limit) our understanding of the issues.

We urge two cautions in considering comparative analyses of special education reform in a post-industrial society. They have been noted by Artiles and Larsen (1998), and are pertinent to this discussion. They are as follows:

1. that, as special education¹ is increasingly located within general education,² these reforms must be examined in the context of broader national educational reform efforts; and
2. that similarities between two nations may be produced by different forces or might serve different functions. (p 6)

The first section of this chapter addresses inclusive education in the broad context of educational reform in the United States, and then turns to inclusive education as a democratic principle in contemporary society.

Inclusive education and educational reform

In the United States, there is no official definition of inclusive education. The term, along with 'inclusion', 'integration' and 'mainstreaming', appears nowhere in the federal legislation – The Education of All Handicapped Children Act, passed in 1975, or its current manifestation, the Individuals with Disabilities Education Act, reauthorized in 1997. Neither does it appear in state statutes.³ The following concepts of inclusive education are presented in light of the above omissions.

In its *National Study of Inclusive Education* (1994), the National Centre on Inclusive Education and Restructuring (NCERI), defined inclusive education as:

providing to all students, including those with significant disabilities, equitable opportunities to receive effective educational services, with the needed supplemental aids and support services, in age-appropriate classes in their neighborhood schools, in order to prepare students for productive lives as full members of society. (p 6)

Recently, a New York City school administrator described inclusive education as 'full membership'. While inclusive education has many facets, including those noted above, the phrase 'full membership' captures the essence of the meaning of inclusive education.

The primary perspective of inclusive education must be viewed from that of the student – both the typical student and the student with disabilities. This perspective can be formulated around the following two questions and answers.

Question 1: Is there a clear demarcation that allows for distinguishing between one set of students – those without disabilities – from another – those with disabilities? Are students sufficiently different in their characteristics (and are there measures of sufficient reliability and validity to mark those distinctions)?

Answer 1: In summarizing the most comprehensive review of the evaluation system for determining whether students have disabilities and require special education services, Ysseldyke (1983) characterized it as little better than a flip of the coin.

Three-quarters of a century ago, Walter Lippman wrote a series of essays on the use of the newly developed IQ tests to measure officer candidates to serve in the United States Army in World War I. In remarks prescient of the special education evaluation system, he wrote of his fear that these tests would be used to label children as inferior and, thus, consign them to a second-class life.

It is not possible, I think, to imagine a more contemptible procedure than to confront a child with a set of puzzles, and after an hour's monkeying around with them, proclaim to the child, or to his parents, that here is a C-minus individual. It would not only be a contemptible thing to do. It would be a crazy thing to do. (Cited in Granger and Granger, 1986, p v)

Question 2: Are there sufficient differences in the needed pedagogic practices so as to allow for a binomial division of children into the permanent categories of disabled/non-disabled or special education/general education?

Answer 2: 'There is no evidence to support the contention that specific categories of students learn differently. Yet, students are instructed in categorical groups on the notion that these groups of students learn differently.' (Ysseldyke, 1983, p 265)

The manner in which we choose to educate students with disabilities is a consequence of the ways in which we view disability. This concept was explored by Hahn.

The conventional approach...has been shaped by a functional limitations model, which assumes that the principal difficulties of people with disabilities resides within these individuals, and that solutions can be found by surmounting or transcending such deficits to the maximum extent possible. Inspired in part by the growing disability rights movement, however, this orientation has been challenged by a 'minority group' paradigm, which posits that the primary problems facing disabled citizens are external rather than internal, and that remedies can be achieved through efforts to alter the environment in which they live, instead of their personal characteristics. While the field of special education traditionally has been dominated by the former model, which stresses the development of effective methods of instruction compatible with the restrictions imposed upon students with various types of disabilities, the latter construct implies a comprehensive new agenda that promises to introduce significant changes in the content as well as the techniques of elementary, secondary, and higher education. (Hahn, 1989, p 225)

The shift in focus from the individual (and his/her impairments) to the social context was presented by Minow (1990) in her analysis of the options facing a school system when educating a child who is deaf.⁴ The school system 'assumed that the problem was Amy's: because she was different from other students, the solution must focus on her'. (Minow, 1990, p 82.) Instead, Minow asserted, one can conceptualize the class as a learning community and Amy as a collaborative 'worker' with her classmates. This shifts the focus from Amy, and means that the problem – and the remedy – involves all of the students.

After all, if Amy cannot communicate with her classmates, they

cannot communicate with her, and all lose the benefit of exchange. Moreover, conducting the class in both spoken and sign language would engage all the students in the difficult and instructive experience of communicating across traditional lines of difference. All the students could learn to struggle with problems of translation and learn to empathize by experiencing first-hand discomfort with an unfamiliar mode of expression. It would be educational for all of them to discover that all languages are arrangements of signs and to use group action to improve the situation of the individual. (Minow, 1990, p 84)

Recognizing the social nature of the problem and 'involving classmates in the solution affords a different stance toward the dilemma of difference: it no longer makes the trait of hearing impairment signify stigma or isolation but responds to the trait as an issue for the entire community' (Minow, 1990, p 84). The consequence not only involves the person with disabilities but also has

consequences for the learning and perspectives of the students without disabilities.

When students in the majority avoid the experience of not being understood, or not understanding what others say, they fail to learn about the limits of their own knowledge. By their very comfort in the situation, they neglect the perspective of any student they consider different from themselves. (p 29)

The consequence for children was identified by the parents of a child who had been labeled as learning-disabled. 'Every time a child is called mentally defective and sent off to the special class for some trivial defect, the children who are left in the regular class receive a message: No one is above suspicion; everyone is being watched by the authorities; nonconformity is dangerous' (Granger and Granger, 1988, p xii).

This point is echoed by the parent of a kindergarten student (Minnesota State Education Department, 1993). At a conference with her son's teacher, the parent was told that two students with physical disabilities would be in the child's class. The teacher 'quickly added that there would be a full-time paraprofessional so that their presence would not take away any time from the other students. This statement was made with the best of intentions for my son.' (p 4.) When the parent picked up her son at the end of the first day, he pointed to an adult and said, 'That lady is for the wheelchair people.' (p 4.) The parent commented,

Today I thought, 'What was Charlie going to learn about people with physical disabilities and other differences that carry the perception of not normal? He could learn that people with disabilities are not competent and need another person to be with them, that they cannot communicate for themselves, that they are always the recipients of help from caregivers.' (p 4)
I believe that children with disabilities do not take away from other children. They do not diminish the community. I believe, instead, that these children, currently known as the 'wheelchair people', have the potential to contribute enormously to my son's learning and growth – but only if the environment and people take advantage of this opportunity. (p 5)

The practice of inclusive education

Inclusive education is not a reform of special education. It is the convergence of the need to restructure the public education system, to meet the needs of a changing society, and the adaptation of the separate special education system, which has been shown to be unsuccessful for the greater number of students who are served by it. It is the development of a unitary system that has educational benefits for both typical students and students with special needs. It is a system that provides quality education for all children.⁵

*Factors included in the rationale for restructuring**Efficacy data*

A growing body of data demonstrates the effectiveness of inclusive education programmes (18th Annual Report, 1996, 62-6; Lipsky and Gartner, 1997, ch. 14). At the same time, there is little evidence demonstrating that segregated special education programmes have significant benefits for students.

Legal issues

While not a requirement of the federal law, inclusive education has been affirmed as appropriate in the major appellate court decisions (Lipton, 1994), while the grounding of the education of students with disabilities in the general education environment is central to the reauthorized Individuals with Disabilities Education Act, or IDEA ('The 1997 Reauthorization', 1998). For example, the law now requires the following:

1. students are not to be referred for special education if the basis of the referral is the inadequacy of instructional programmes provided;
2. when a student with disabilities is not to be served in the general education environment (with needed supplemental aids and support services), then the particular bases for such exclusion must be explained, and justification provided for such exclusion; and
3. outcome standards for students with disabilities must be drawn from the outcomes expected of students in general, and the results of their performance must be included in the school's overall results.

Procedural issues

The emphasis on formal procedures, especially with regard to the evaluation of students, and to the determination of their eligibility for special education services, has too often been at the expense (in educators' time and school system resources) of instructional activities that directly benefit students.

Population increases

The growing population of students 'identified', especially in the 'learning disability' category, is of increasing concern, because of both its fiscal and pedagogical consequences.

Disjointedness

The current design discourages a unitary system and often precludes a student from participating with his/her peers in general education. Too often, the curriculum taught in segregated special education programmes is separate and different from that taught in the general classroom for typical students. This is true even in the Resource Room programme, which is the least separate of the special education services (Allington and McGill-Franzen, 1992).

Funding

The growing cost of special education services, particularly in the light of the limited effectiveness of the separate design, threatens continuing tax-payer support. Further, the pattern of funding special education has been a disincentive to serving students in the general education environment. The reauthorized IDEA now requires that states adopt funding formulae that are placement-neutral; in other words, the formulas should not provide an incentive for placing a child in a more restrictive setting.

Inclusive schools

While there is no single educational model or approach, inclusive schools tend to share similar characteristics and beliefs (*National Study*, 1995; Lipsky and Gartner, 1997; Stainback and Stainback, 1996). These are detailed below.

School-wide approaches

Inclusion is not a single 'pilot' or special inclusion class. The philosophy and practice of inclusive education is accepted by all stakeholders. As a consequence, the school brings together the full range of students, educational personnel, and fiscal, and other, resources.

All children can learn

Inclusive schools have a belief that all children can learn and that all benefit when that learning is done together.

A sense of community

The belief is that all children belong and that diversity among students is a positive characteristic for the school (and for society). A child does not have to 'prove' his or her way in order to be included.

Services based on need rather than location

Each student is recognized as an individual, with strengths and needs, not as a label or as a member of a category. Further, the response to those needs is seen as the provision of services.

Natural proportions

Students attend their home school, thus assuring that each school (and class) has a natural proportion of students with and without disabilities.

Supports are provided in general education

Schools recognize that all students have special needs. In doing so, they do not equate this with the need for separate programmes. Rather than addressing those needs in separate locations or programmes, in the language of the