

World Education Forum

Dakar, Senegal
26-28 April 2000

Education for All
2000 Assessment



T H E M A T I C S T U D I E S

Inclusion in Education: The Participation of Disabled Learners



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Inclusion in Education: The Participation of Disabled Learners

Co-ordinated by the United Nations Educational, Scientific
and Cultural Organization

James Lynch



Inclusion in Education: The Participation of Disabled Learners

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Contents

Introduction and overview: making progress in inclusive education?	3
<input type="checkbox"/> Overview.....	3
<input type="checkbox"/> Including learners with impairments.....	3
<input type="checkbox"/> Why inclusive education?.....	4
<input type="checkbox"/> From inclusion of learners with impairments to learning and participation for all.....	5
<input type="checkbox"/> Links to other thematic studies.....	6
<input type="checkbox"/> Progress since Jomtien.....	6
Developing conceptions of inclusive education	8
<input type="checkbox"/> Approaching inclusion in education.....	8
<input type="checkbox"/> Realism in defining and implementing inclusive education.....	9
<input type="checkbox"/> A working definition of inclusive education.....	11
<input type="checkbox"/> Concept characteristics of inclusive education.....	12
Barriers to participation, inclusion and learning	13
<input type="checkbox"/> Barriers to inclusion: a macro perspective.....	13
<input type="checkbox"/> Financial and resource barriers.....	14
<input type="checkbox"/> Barriers to learning: an individual perspective.....	16
<input type="checkbox"/> Institutional and pedagogical barriers.....	16
<input type="checkbox"/> Barriers of definition and categorization.....	17
<input type="checkbox"/> A 'social model' of difficulties in learning and disability.....	20
Measuring and evaluating for inclusive education	21
<input type="checkbox"/> Measuring the progress of inclusion.....	21
<input type="checkbox"/> Indices for inclusion.....	22
<input type="checkbox"/> Democratic evaluation and inclusion in education.....	23
Developing inclusive education policies	26
<input type="checkbox"/> Power and influence in policy development.....	26
<input type="checkbox"/> Developing national policy.....	28
<input type="checkbox"/> Interlearning among countries.....	31
Developing inclusive learning centres	33
<input type="checkbox"/> Communities participating in inclusive education.....	33
<input type="checkbox"/> Improving the conditions for learning.....	36
<input type="checkbox"/> A framework for curriculum delivery.....	37
<input type="checkbox"/> Producing inclusive learning centre policies.....	38
<input type="checkbox"/> Evolving inclusive teaching and learning practices.....	38
Human resources and inclusion	40
<input type="checkbox"/> Inclusive education and the development of inclusive capacity.....	40
<input type="checkbox"/> Revising the training of educational personnel.....	41
<input type="checkbox"/> Encouraging professional staff development at all levels.....	43

■ Challenges and opportunities	44
□ From access to potent participation	44
■ Notes	47
■ Some terms	51
■ References and bibliography	53
■ List of boxes	
1. An example of the movement towards more inclusive education in Italy	7
2. A study of Special Educational Needs children in Swiss ordinary and special classes	9
3. An example of some conditions of access to learning	10
4. A working definition of inclusive education	11
5. Inclusive education and the deaf child in South Africa: some dilemmas	12
6. Some basic concept characteristics of inclusive education	12
7. Some factors inhibiting the development of inclusive education	14
8. Catering for children with disabilities in Ireland	15
9. Overcoming the barriers	16
10. A contract approach to the involvement of a community in a school improvement plan	17
11. National policies to encourage responses to diversity: the Golden Key Project	19
12. Disability as contagion	21
13. Integration and evaluation in Romania	22
14. The REFLECT approach to participatory rural appraisal	24
15. Parental involvement in assessment in the Silahis ng Kaularan Centre	25
16. Participatory monitoring: an example from South Africa	25
17. Parental involvement in schooling decisions in Ireland	27
18. Inclusion and participation: a project in Lesotho	27
19. Madagascar: decentralization and the continuing role of the state	29
20. Flexible and adaptive curriculum in a Lisbon school	31
21. Learner representative councils in South Africa	34
22. Community involvement in learning centres in Uganda	34
23. The open school methodology in Brazil	36
24. An extensive and flexible curriculum, diversifiable and adaptable to social, cultural and individual differences	37
25. Itinerant specialist teachers in Kenya	38
26. Curricular integration for inclusion in Mexico	39
27. Some major economic benefits which may accrue from inclusive education	40
28. Parents' concerns for their child	45
29. New technology and inclusion	46

1. Introduction and overview: making progress in inclusive education?¹

Overview

This study reviews developments in the theory, policy and practice of inclusive education since the World Conference on Education for All (Jomtien, Thailand, 1990) and incorporates commissioned and collected material as well as dedicated texts produced for the World Education Forum (Dakar, 2000). It locates the review firmly within a human rights context. It has a dual focus. Firstly, it examines progress in the development of an inclusive concept of education and movements towards that concept in a number of systems of education. In widening responses to the full diversity of learners, inclusive education is seen as a strategic process to overcome the current exclusion of some 113 million children of school age worldwide at the initial stage and many millions more through drop-out and repetition at each succeeding stage of the education system. It is thus concerned with all groups that are currently excluded, deprived of their human right to primary education, and with identifying the barriers which prevent their inclusion.

Secondly, within this broad perspective, this study illustrates the efforts made by learners with impairments to overcome barriers of access to and full participation in education at all levels, especially throughout the whole of the primary school cycle. It seeks to assess in a realistic manner the practicalities involved in the movement from separate provision for the majority of those pupils, or no provision at all, to the mainstreaming of the majority of those learners into the regular education system, particularly given the current capacity of so many schools in the developing world. The study also recognizes that the problem of achieving education for all is not solely one of initial access and enrolment, although clearly that is a crucial pressure point in every system, but also one of regular attendance, of retention, and of timely and successful completion.² Moreover, it acknowledges the importance of health and nutrition inputs in supporting successful participation in education and readiness to learn, particularly at the primary level. In other words, the issues of the prerequisite conditions for learning, the quality of the school experience, regular attendance and retention within an ethos of success have to be addressed in any realistic discussion of inclusive education.

The study contains analysis interspersed with examples of instructive practice, derived from a wide scan undertaken over a period of two years on behalf of UNESCO. The study does

not seek to be comprehensive in its coverage or to claim that the examples given are statistically or otherwise representative or appropriate for all systems. Rather it offers a catalogue of illustrated arguments that could enlighten policy options for decision- and policy-makers, whether national or in bilateral or multilateral organizations. The practices highlight some of the major barriers to inclusion and give accounts of some of the ways in which those barriers, encountered at all levels of the system, have been overcome in creative and innovative ways. The study provides a descriptive overview of changes in practice and has a strategic function in identifying priorities and policy options, including financial policy options, for development.

Including learners with impairments

Inclusive education is commonly and rightly associated with the mainstream participation of learners with impairments and those categorized as having 'special educational needs'. It is often referred to as 'mainstreaming'. But this is not the whole story. At the same time, inclusive education is concerned with identifying and overcoming all barriers to effective, continuous and quality participation in education, particularly during the primary cycle, where a well-documented human right to free participation is widely accepted. For instance, as a movement took place to include as many as possible of the pupils with impairments in the mainstream schools of the 'North' throughout the past decade, learners with impairments continued to be disproportionately excluded from any form of education in countries of the 'South',³ and they remain the group most likely to be left off the agenda when educational exclusion is discussed. Of course, it is not the case that all those pupils can be mainstreamed within the regular school for all or part of their schooling. Some pupils with particularly severe impairments will never be able to be mainstreamed. Yet they still retain a right to be educated and to maximize their personal development and their contribution to their community and society. They also have a right to be included, but not necessarily fully, partially or permanently mainstreamed.

Learners with impairments are not a homogeneous group. Physical and mental impairments are multiform and they are variable in their severity. Moreover, according to the precise geographical location, the same impairment may differ in definition, identification and assessment, and allocation. A learner who might be categorized as having 'special educational needs' in Finland may not be in Malawi. Even in the same country, the same impairment may be differently defined by different professionals in different contexts.⁴ Children with disabilities are as different from – and similar to – one another as any learner is different from – and similar to another. No two learners are exactly alike and both their educational and social needs are equally diverse. For example, learners who are profoundly deaf and whose first language is sign language need media for sign language learning, but they

also need a sign language community to provide a cultural seedbed and social context for their human interaction. Such considerations need to be reflected in plans for increasing their participation in education and the financing of those plans. All children with disabilities, perhaps as many as 160 million in developing countries alone, have a right to schooling 'conducive to their fullest possible social integration, educational inclusion and individual development'.

This study builds on such instruments as the United Nations Standard Rules on the Equalization of Opportunities, the World Declaration on Education for All (adopted at Jomtien, Thailand, 1990) and the Salamanca Statement and Framework for Action, in highlighting the exclusion of disabled people at all levels of education and society, and the formidable obstacles to participation that they still face. It recognizes the key role that has been played by individuals with impairments, organizations of disabled people and parents of disabled children in pressing for the recognition of the right to education of disabled learners in their neighbourhood and society. Some of the lessons that have been learnt about the barriers to the inclusion of learners with impairments and how these can be overcome are presented. The role of governments and of non-governmental organizations in supporting inclusive education and broader social integration and personal development is identified. In most countries of the world, there are already numerous examples of instructive practice in the educational inclusion of learners with impairments, even where economic circumstances or priorities lead to large classes and poor physical conditions in learning centres. Some of these examples are briefly cited in this text as information for others and an encouragement to address all barriers to the full participation of all in education for all.

This report is concerned with the many other currently excluded groups in addition to disabled learners, who suffer from social and economic or cultural disadvantage, and who also continue to be excluded. Such groups include girls and women, street and working children, refugees, orphans (not least those whose parents have died of AIDS), language and ethnic minority children and those in regions of civil unrest and conflict, as well as religious, social, cultural and ethnic minorities. But exclusion is not an exclusively educational matter. It may also be caused by other elements in the learner's environment, such as cultural, geographical,⁵ health and nutritional factors. This means that, even where the facilities exist, learners are effectively excluded from taking full advantage even of the minimal opportunities which may be available to them. Any consideration of inclusive education has to embrace these factors as well.

As in the case of those defined as disabled learners, such groups of marginalized and excluded learners are not homogeneous in definition, place or time. Moreover, while most of the focus of this report is on children, and the acknowledged major means for the movement towards EFA must remain the provision of universal primary education (UPE), inclusive education

must also seek to include those adults and out-of-school youths, especially females, who are excluded from adult basic education.⁶ Thus, inclusive education addresses the full gamut of barriers to effective and quality participation in education, and the full spectrum of learners, with a special emphasis on those who have a human right to such participation, at least at the basic stages of education. In other words, rather than the former categorization of learners into two groups, regular and special, inclusive education in this report is seen as an overall strategy for addressing the full spectrum of diversity in education and preventing the exclusion and marginalization of all learners. In place of the previous binary focus, inclusive education is a unitary concept, which recognizes that there is a 'continuum of needs, requiring a continuum of provision, which may be made in a variety of different forms' (United Kingdom, Department of Education, 1994, p. 2).

Why inclusive education?

The question is often asked why inclusive education is necessary as a new educational strategy, particularly in those countries that have a commitment to and apparent existing policies on education for all. It is important that this question be treated with due gravity. Will the adoption of a strategy to build more inclusive education systems and institutions help or hinder the achievement of the very urgent and important objective of EFA? The answer is emphatic. Without the development of inclusive policies in education or an analogous strategy to include all learners, who have a basic human right to education, EFA will not be achieved. The reason is that all systems, even those overtly committed to education for all, have a tendency to exclude, sometimes directly and sometimes indirectly, sometimes consciously, sometimes inadvertently, through the construction of religious, ethnic, racial, gender, linguistic, educational, intellectual and other barriers to participation. It may be thought that this stricture does not apply to industrialized societies with well-developed and well-funded systems of education

But the movement from exclusive to inclusive systems of education is not a linear, uni-directional pathway. Even mature systems of some historical extent, such as elementary schooling in Europe, have a tendency to discriminate, marginalize and exclude when confronted with the new challenges, such as those of mass immigration or increased and previously unencountered diversity. Indeed the upsurge of racial prejudice in most countries in Europe in the past decade, combined, in some cases with systems of real social apartheid for several long-persecuted minorities in transitional economy countries in Europe, has emphasized once again the need for a more rapid movement to fully inclusive educational policies – legal, systemic, institutional and curricular. Indeed, social and educational exclusion, far from being reduced, are actually increasing in some major 'developed' regions of the world.

The situation is different in many developing countries, with a different economic and cultural context. But the pressures against inclusion are there, none the less. For instance, while schemes such as the EDUCO basic literacy programme in El Salvador and the district primary education in India seek to vigorously confront exclusion from education, there has been, in some cases and with the support of important donors, a sidelining of the very indigenous culture needed to mainstream social and educational issues. All countries, in the affluent North and the less affluent South, face continuing and new pressures to exclude, to marginalize, to discriminate against certain groups of learners.

There is little doubt that pressure to move to more inclusive systems and institutions is facing strong countervailing pressures to exclude both socially and educationally. Thus, if EFA is to be achieved, it is essential to have an articulated strategy, including appropriate financial and policy parameters, that identify and tackle those countervailing pressures and all barriers to inclusion explicitly, and effectively deal with them in order to facilitate the achievement of the goal of EFA. In neither of the scenarios, industrialized or developing, will silence suffice to overcome exclusion, which is often deep-rooted in historical prejudice. Therefore, an explicit strategy for education is required, whose central characteristic and aim is to address and surmount all barriers to full participation of all learners in effective, quality opportunities for successful learning throughout their education. In this report, that strategy is called, for short, 'inclusive education'.

From inclusion of learners with impairments to learning and participation for all

It follows from what has been said above that inclusive education, as defined in this study, is not solely concerned with learners with impairments, those who are sometimes referred to as disabled or handicapped, although the full inclusion of those learners is a central concern of this report. This report is concerned with ways of identifying and overcoming all barriers to learning and participation, experienced by all learners, vulnerable to exclusion or marginalization from full, successful and quality educational participation. This view of educational inclusion involves a holistic, dynamic and complementary focus on all learners and learning centres, education systems and their personnel, communities and societies, as well as the underlying value systems, which are the cause of exclusion. Inclusive education is thus about achieving the basic human and civic rights of all, including those with physical, sensory, intellectual or situational impairments, through the creation of inclusive policies and practices at all levels of education systems, their values, knowledge systems and cultures, processes and structures.

Diversity of needs is a challenge. But it is also an opportunity to enrich learning and social relations: a pedagogical challenge for system and institution, rather than an individual problem. To

face up to this challenge means reforming systems and schools and restructuring classroom activity so that all learners can respond to opportunities and all teachers can construct them. In this way, methodological and organizational changes introduced to benefit those with impairments or others who have traditionally been excluded may, under the right conditions, benefit all children. But it is evident that the educational inclusion of all learners cannot proceed without developing the capacity and resources of learning centres to respond to learner diversity, and that cannot proceed without the right policies and financial planning. Movement towards greater inclusion in education predicates the development of a two-way strategy, both top-down and bottom-up, which can include grass-roots involvement.

This advance, moving beyond access to learning centres for some learners to the development of free, quality educational provision and participation throughout the cycle for all, is now perceived in many countries as critical to the development of their education policies and national development. But it requires a transformation of traditional approaches to the provision of education, and to teaching and learning, and a revolution in training for the education profession. It also requires additional facilities and resources. In toto, these changes represent what a recent World Bank publication calls a quantum leap in education development (World Bank, 2001, pp. 37 et seq.). It is no wonder that it remains so widely unachieved.

Part of the problem is one of intellectual 'inheritance'. By employing a restricted view of inclusive education, limited only to certain groups, albeit groups urgently needing special attention, traditional interventions have tended to ring-fence their contribution to sustainable educational and broader national development. The consequence has been the continued exclusion of millions of other children from their human right to a free primary schooling throughout the cycle, and the continued exclusion of many millions of other learners from the opportunity for basic education and for poverty reduction.⁷ Indeed, if a definition of inclusion is employed that covers enrolment, attendance, retention, internal efficiency (e.g. reduction in repetition⁸) and learning outcomes, the number of those children who are currently excluded is likely to be many times the 113 million listed in official figures as excluded from primary and basic education.⁹ In this report, movement towards inclusive policies in education is seen as a means by which equitable and quality educational development can take place for all throughout the basic cycle at a level of quality and with successful outcomes that in turn enhance learners' self-regard and esteem.

Policies for the movement towards inclusive education and its effective practice have to come to terms with three major factors: the inherent diversity of the population to be educated and their diverse needs; the pluralism of responses required; and the countervailing tendencies to exclusion, especially because of intellectual traditions and epistemologies.

Links to other thematic studies

The study is set within a particular intellectual and historical tradition. It is a companion volume to the other thematic studies written to prepare the Dakar World Education Forum (World Education Forum . . . , 2000), including those addressing children in difficult circumstances, gender inequality, refugees and excluded learners. Because there were no questions in the EFA assessment about the participation of disabled learners nor about other marginalized or excluded groups, the other thematic studies provide complementary texts for this report, and many of the themes from these studies are integrated into this text at a later stage. In particular, there are three major dimensions of the thematic studies which have informed the preparation of this report and are corollaries to the arguments presented. These 'companions' to the preparation of this report are: decentralization and participation; financing and resourcing; and health and nutrition.

First, for example, at the policy and administrative levels, the thematic study, *Community Partnerships in Education* (UNESCO, 2001), addresses some of the critical factors in the development of inclusive learning centres, and these considerations are dealt with in the sections on participation, involvement and democratic evaluation. International experience shows that the participation of parents in decision-making about educational provision for their children is crucial to the effectiveness and success of that provision. As the report of the International Commission on Education for the Twenty-first Century puts it, 'Local community participation in assessing needs by means of a dialogue with the public authorities and groups concerned in society is a first, essential stage in broadening access to education and improving its quality' (Delors et al., 1996, p. 29).

But that study argues that the role of parents, caregivers and the community in inclusive education will need to be much wider even than this, testing the boundaries of conventional schooling and making schools more accountable and transparent through the active involvement of parents and communities in management and supervision. Decentralized delivery of education is one of the major imperatives for EFA (and a characteristic of any realistic inclusive education), certainly in Africa, for a number of cogent reasons, but firstly simply because governments cannot achieve this goal on their own. This report argues that meaningful participation should include contractual obligations on all parties, as well as a management and supervision role for parents to make sure that teachers actually appear in the classroom when they should.

Second, increasing numbers of countries are achieving debt forgiveness, and there is promise of additional financing becoming available for basic and primary education, potentially changing the resource context for the achievement of EFA. Thus, the study entitled *Funding Agency Contributions to EFA* (UNESCO, 2001) is also central to the consideration of the

policies and practices formulated in this volume, if they are to be realistic and achievable. Devolution, it is argued, for example, cannot be seen as an opportunity for governments to delegate their overall and continuing responsibility for education and its financing by placing an additional economic burden on already impoverished communities. Provision of education must enrich the local community, not impoverish it.

Third, health and nutrition are important elements for the empowerment of learners to take advantage of the opportunities available (see *School Health and Nutrition*, UNESCO, 2001). As argued above, a malnourished, sick child is unable fully to take advantage of educational opportunities, however good they may be. Moreover, it is scandalous that donors support feeding programmes for secondary and higher education, but neglect those most at risk in primary schools; a majority of schools in some countries still do not even have a water point for potable water.

As the World Bank strategy for the sector expresses it, 'Children's health affects their ability to learn. Children who are ill, hungry and malnourished attend school irregularly, and when they do attend, are often unable to concentrate. . . . Fortunately, schools themselves provide a cost-effective means of providing simple, well-tried health services . . . to solve the most prevalent, immediate problems, as well as promoting healthy lifestyles . . .' (World Bank, 2000, p. 8). Thus, the development of full inclusion in education requires attention, not only to the structure of schools and classrooms, but also to the circumambient conditions that facilitate learning for all, both inside and outside learning centres, as well as the development and sustenance of creative partnerships, involving both intersectoral and interprofessional co-ordination and co-operation.

Progress since Jomtien

The world of the twenty-first century is already fundamentally different from the one in which the Jomtien Conference took place and in which the ideals of its Declaration and Framework for Action were formulated. It is a world that is likely to change ever more rapidly during this century. While the overall goals of Jomtien remain valid, there are new political and social circumstances, conditions and opportunities, which frame a radically different context. The new 'drivers of change', for example, as the World Bank education strategy describes them, are important factors which must be taken into account. The new opportunities will be lost, unless the fundamental change that they represent is recognized. These drivers of change are: the rapid spread of democracy, the prevalence of market economies, the globalization of markets and knowledge, the technological revolution, the changing roles of government, individuals and the private sector (World Bank, 2000, p. 2) to which might be added, new perceptions of the tasks and available strategies by donors. All these factors have contributed to

produce new opportunities and new challenges; new ways to address the issues of access, quality, content, method, management and cost in the provision of education for all. Unless these changed circumstances are explored and exploited for their implications on inclusive education, quality EFA, relevant to local conditions, will not be achieved.

■ **Box 1. An example of the movement towards more inclusive education in Italy**

The movement to the inclusion of children with special needs into the mainstream classroom was advanced by reports, legislation, policy and practice in both North America and Europe. In Italy, for example, Law 517 of 1977 addressed the presence of children with disabilities in the compulsory education system. The inclusion of these children was intended to reciprocally activate adaptation and growth processes on the part of children with disabilities, their peers, teachers and schools. Today (1993), we can safely affirm that all children with disabilities are integrated into regular elementary and middle schools in Italy. In 1988, Ministerial Bulletin 262 guaranteed the presence of students with disabilities at the secondary school level. In 1992, Outline Law 104 abrogated both special schools and special classes and dealt exhaustively with the right to education and instruction, integration in the academic system, procedures for implementing integration, interprofessional teamwork in scholastic integration, assessment of progress and examinations. A permanent observatory was established at the Ministry of Public Education for inter-institutional and interprofessional problems relating to the integration of students with disabilities.

Source: P. Gherardini et al., 'First Experiences of Inclusion at High School Level' in Trintje de Wit (ed.), All Together (K)now: Possibilities for Integration in Europe, Utrecht, Seminarium voor Orthopedagogiek, 1993.

Certainly, it has to be acknowledged that the past decade has seen a succession of efforts that have contributed to progress towards EFA, made since the Jomtien Conference. In Europe and North America, the movement towards the fuller inclusion in education of those learners with impairments has been both rapid and decisive almost everywhere (see Box 1). At the same time a countervailing tendency to new exclusions and marginalization has accelerated, sometimes as a corollary to mass immigration, sometimes as an expression of age-old prejudices reawakened. Nevertheless, there are many examples of successful movements to greater inclusion, and not just restricted to the North. For example, a study undertaken in 1998 of six countries in four different continents, differing in size and population, economic development, ethnic composition, culture and educational tradition, found a number of common factors, such as: a) the development of laws that provide educational opportunities for students with disabilities;

b) a movement to bring the education of students with impairments closer to mainstream educational activities; c) recognition of the central role of parents; d) attention to the roles of adults with impairments; e) the importance of professional development; and f) the necessity for sufficient resources (Lipsky and Gartner, 1998). These themes recur throughout this report.

This report is indebted to accounts of many such reforms and developments, changes and innovations. It also draws on insights from a whole series of international reports and documents, which have set down successive markers, guidelines and prerequisites for the future achievement of quality EFA. These include the World Conference on Education for All (1990), World Summit for Children, the World Conference on Human Rights (1993), the World Conference on Special Needs Education: Access and Quality (1994), the World Summit for Social Development (1995), the International Conference on Child labour (1997) and the World Education Forum (2000).¹⁰ But the movement to and advocacy of more inclusive education systems has to be considered against a background in many countries, particularly in Africa and South Asia, in which access to and quality of education are still insufficient even to sustain basic economic and social development, let alone to draw those countries out of the cycle of poverty and conflict. Such countries are faced with ever more rapid change, where their hard-won human resources are often poached by richer countries and where there are trade rules and agricultural and economic barriers that discriminate in favour of richer countries. The modest achievements and progress towards EFA since Jomtien are truly remarkable. Yet they have none the less remained by far too insufficient to achieve the cherished goal of EFA.¹¹

To summarize, the message is one of progress and new challenges. In a context where almost half of the world's 6 billion people live on less than \$2 a day and 40 per cent of the people of Africa must exist on less than \$1 a day, there is a 'mountain to climb' (World Bank, 2000) before EFA can truly be said to have been achieved. Moreover, as indicated above, many forms of exclusion have increased in the past decade. It is against this background that our report seeks to take sober account of the still depressing starting point and to illuminate policies, practices and approaches to achieve the Dakar Framework for Action goal of 'ensuring that by 2015 all children, particularly girls, children in difficult circumstances and those belonging to ethnic minorities, have access to and complete, free and compulsory primary education of good quality' (World Education Forum, 2000, p. 8 [see also UNESCO, *World Education Report 2000*, Paris, UNESCO Publishing, 2000]). ■

Developing conceptions of inclusive education

Approaching inclusion in education

Although there were earlier precursors from the 1950s onwards, the movement towards more inclusive educational provision draws strongly on the Swedish debate about normalization in the 1970s, and major policy developments in many European and North American countries. One example of this movement towards greater inclusion in education for learners with impairments is the succession of legislation in the United States in 1975, 1986, 1990, and 1997.¹² The corollary of such developments in the North has been a progressive, gradual and cumulative major shift in the past decade towards more inclusive and comprehensive provision for all learners, representative of what one might describe as a shift in the basic paradigm of educational provision. And if the range of inclusion has been expanded, so the focus has also moved to home in more strongly on the processes through which inclusive education can be successfully implemented. Thus, this movement, added to those 'drivers of change' referred to in the previous chapter, has complemented the much sharper and more transparent focus on the human and civil rights of those with impairments, to effect a major and continuing change to the basic paradigm of education and schooling.¹³

From separate provision for two groups of children, special and regular, there has been, at least in the North, a major shift in many countries, such as Australia, the Scandinavian countries, France, Germany, the United States, Ireland and the United Kingdom, towards a unified continuum of provision. This can embrace all children within an institutional and curricular system, but not necessarily within the same classroom or building, and is fully responsive to the diversity of all learners' needs and capacities. Such education can occur across a spectrum of provision from full mainstreaming for learners with impairments in an ordinary day school to complete segregation in a residential special school, with many intermediate situations along that continuum. Provision can, for example, include special supplementary assistance in ordinary classrooms for part or all of the time within the framework of the ordinary curriculum, inclusion in ordinary classes combined with withdrawal for specific aspects of the curriculum, shared time in ordinary and special classrooms, full-time special class, full-time special school and full-time with special care at a residential school, with vacations with the family at home.¹⁴ In some developing countries also, such as India, which has a long-established and extensive system of special schools, the movement to inclusive education grew out of considerations

of necessity as much as ideology. For reasons of cost-effectiveness and practicality, a system of inclusion was born and is now not only well established, but moving rapidly and systematically towards a more fully inclusive system of education (India, Ministry . . . , 2000, p. 8).

The essence of this shift in paradigm was grasped by the 1994 Salamanca Conference when it stated, 'The guiding principle that informs this Framework is that schools should accommodate all children regardless of their physical, intellectual, emotional, linguistic or other conditions. This should include impaired and gifted children (who may also have impairments), girls, street and working children, children from remote, travelling or nomadic populations, children who have lost their parents through AIDS or civil strife, children from linguistic, ethnic or cultural minorities and children from other disadvantaged or marginalized groups The development of inclusive schools as the most effective means for achieving education for all must be recognized . . .' (World Conference on Special . . . , 1994, p. 41). Thus, while the concept of inclusive education grew in the early 1990s out of concerns about the exclusion of disabled learners from education and the segregation of all such learners into special education centres separate from mainstream schools, inclusive education now embraces the participation of all learners from all marginalized and excluded groups, if at all possible, in the cultures, curricula and communities of local learning centres.

Finally in this section, a word should be said about the concept of 'special educational needs'. For a number of reasons, this concept is used with caution in this study and mainly, although not exclusively, in referring to work of others who use the term. The reasons are evident. Firstly, the term may perpetuate the binary divide of special and regular under new labels. Secondly, it is not always helpful in resolving educational difficulties and may in itself present a barrier to the development of inclusive practice. Thirdly, it may run the risk of encouraging educators to attribute difficulties in education exclusively to deficits in learners, rather than to identify the problem in the interaction of impairments, disadvantage, etc. with the learning environment and culture. In the special needs scenario, the burden is thus often placed on the child to adjust to the school, rather than vice versa. Finally, the concept may excuse educators from changing their practice to accommodate to the diversity of learners' needs, an essential characteristic of inclusive education. It may excuse schools from the onus of showing that they cannot meet the needs of the child and may obscure the fact that learners may have multiple membership in several marginalized or excluded groups.

The above factors represent a cogent rationale of why it is important not to make the mistake of assuming that the context of post-Dakar 2000 is the same as that of post-Jomtien 1990. The goals may remain, but the strategies have to change in line with the shifts in human understanding and experience of how the continuing problems of exclusion and marginaliz-

ation can be overcome. They also have to change to challenge effectively the 'new' pressures to exclusion. Unless this change is adequately reflected in the planning for 'Where 2010', the goal of EFA will be as far away then as it is now. It is in response to these changes and as a vehicle for future changes that the term 'inclusive education' was coined and has received increasing currency in both North and South as a means to achieve EFA.

Realism in defining and implementing inclusive education

But there is no doubt that the change process, which is the movement towards inclusive education, advances major new challenges for all concerned, not least the head teachers and teachers in the schools and classrooms who are called on to deliver EFA and need to be motivated to change, sometimes in the opposite direction to the wider society. But can schools and teachers effectively challenge the values of the wider society? And where will be the source of their changed values and attitudes in societies where social exclusion is the taken-for-granted reality? Even at the practical grassroots level, the demands of family-grouped or multigrade teaching, of responsive and flexible curriculum differentiation according to individual needs, of teaching for prejudice reduction, of teamwork within the same classroom, of interprofessional case discussions outside the classroom, of additional responsibilities and accountability across an individual education programme for each child, and of learning to feel comfortable with diversity – all these will tax even the best trained, most capable and dedicated teachers. The complexity and scale of the human and professional task must not be underestimated. The task cannot be considered as just a simple add-on (Only 20 per cent to go!) to what has already been achieved since Jomtien. Rather it will mean fundamental change in what has already been achieved.

In this connection, a new approach is gradually emerging for the role of governments in the administration and management of education in general and inclusion in particular: a strengthening of the role of government in some respects, for example in establishing standards, and a recession in its role in others, in the appointment of teachers for example, as it devolves more and more of the daily running of schools to schools and to local communities, in an attempt to make service delivery of education more responsive to the needs and demands of parents and children. One major initial step has been the circulation of policy proposals for discussion and comment, and the clarification and dissemination of policies and guidelines, so that all staff in education have an overview of what is expected of them and their institution.¹⁵ Another has been the movement to what might be called greater transparency and collegiality among countries, which makes backsliding from human rights commitments more obvious and, therefore, less likely.

Several countries have already begun to tackle the task of clarifying and disseminating policies and guidelines for provision of services for both gifted children and those with impairments or special needs.¹⁶ Inclusive education requires the restructuring of the policies and practices in schools so that they support the learning and participation of the full diversity of learners in their community, and this process has certainly begun in many countries and different contexts. Teaching/learning methods and materials have also begun to be adapted, revised and retrained for, and major changes in curricular content and associated pedagogies are being planned and implemented, with consequent major changes in the concepts and policies surrounding the initial, induction and in-service training of educational personnel. Experimentation with different packages and approaches to inclusive curricular and the retraining of teachers have also given useful feedback about successful instructive practice. Several pilot programmes have been subject to wider generalization and appraisal.

Given that these initiatives have moved forward the process of developing and implementing inclusive policies in education, it is nonetheless important to consider the development of inclusive education in the cold light of cultural and social reality, devoid of its rhetoric, shorn of its inflated ambitions. Any *working* definition of inclusive education must be a *workable* definition, which starts where each country is now and which can guide the critical path of a developmental process into the future. If inclusive education is really to contribute to an accelerated achievement of EFA, and not to retard it, it is important that account be taken of the new demands, challenges, difficulties, dilemmas and tensions that this change will imply. For it is evident that there will be important tensions generated by making operational the shift in paradigm that informs inclusive education. It will, for instance, necessitate a rewriting of the covenant, involving parents and the local communities in the running of *their* schools, which will evoke a greater tension between the demands of democratization and professionalization.

■ **Box 2. A study of Special Educational Needs children in Swiss ordinary and special classes**

The . . . case study . . . included a direct comparison . . . of the education of children with special needs in ordinary classes and in special classes. Children with special needs in ordinary classes were not very popular, though it seems that they would not have been more popular in special classes. Their perception of their own abilities was also lower than that of children in special classes, though in fact their progress, particularly in mathematics, was far greater. Their presence in ordinary classes did not appear to hinder the progress of able children. Overall costs of supporting these children in ordinary classes and special classes were about the same.

Source: Slightly adapted from the Swiss case study in OECD *Integrating Students with Special Needs into Mainstream Classrooms*, Paris, OECD, 1995, p. 220.

For many teachers the demand that 'parents should be actively involved with the professionals in making a recommendation concerning their children's initial school placement will be difficult to accept. Making the implications of each alternative placement plain to parents to assist them in making an informed decision will not come easily to all teachers, and certainly not without appropriate training' (Ireland . . . , 1994, p. 33). Teachers and other educational personnel may see such an approach as a reduction in their professional role. But, in some cases, expectations of teachers have already progressed even further. For instance, more recent American legislation, dating from 1997, reaches beyond such a requirement for formal participation to substantive involvement. So the curtain of transparency and accountability is rising ever further for teachers. Even in cases where universal schooling already exists, there are dilemmas of educational judgement about whether it is either feasible or desirable to attempt to cater appropriately for all pupils with special needs or impairments in the regular school setting, however severe that impairment. Perhaps taking the pupil to the service is a more realistic and cost-effective option. On the other hand, in cases where there is not yet universal schooling, and where even the half-way house of a designated single or multi-category mainstream school to provide a specialized service is not practicable or possible, the local school may be the only option for all learners, with consequent implications for teachers, their expertise and professional judgements.

Greater inclusion of those with impairments may also evoke other responses, such as stereotypical reactions from other learners and parents. There may, for example, be interpersonal tensions among children and parents associated with the presence of children who are perceived to be receiving additional attention in a single classroom.¹⁷ There may also be epistemological tensions between the prescription of national curricula, with an emphasis on content, and the view, widely held among special educators, of curriculum as process (Halpin and Lewis, 1996). There may be tensions associated with conditions of work and the additional demands on teachers' time outside the classroom and the new skills which will have to be learned, perhaps for home visiting or interprofessional case-work conferences.

There will certainly be additional demands on teachers' time and expertise, if adequate linkages among services are to be maintained and developed. The paradigm shift will call for a new regime of monitoring and evaluation, and an improved accountability of authorities to the people for the provision of an effective, quality education. Again, there will be tensions between the more accurate, rapid identification of educational needs, more quickly responded to at local level and the need for ongoing central monitoring and maintenance of standards. Decentralization and accountability are not always comfortable bedfellows. It may even require changes in the existing capital infrastructure of provision and capitation regulations, which will need to be legitimated on the ground by professionals to involved lay personnel.

■ Box 3. An example of some conditions of access to learning

'... For children with sensory disabilities, amplification of sounds and magnification of images may not, in themselves, be sufficient to ensure their access to learning. The SEN students, their teachers and perhaps the other students may have to learn and use elements of a specialized communication system. . . . Children who are limited intellectually may need to have spoken and written information simplified, to be allowed more time . . . to have certain more complex aspects of the syllabus left out. This process of curriculum differentiation implies the need for teachers to make a creative approach to classroom organization and task analysis. Additionally the school management must be adjusted. . . . This creative approach is difficult to achieve where the content of each school subject is prescribed in detail, allowing teachers little scope to make flexible interpretations to meet the needs of children varying in age, ability and cultural background.'

Source: Slightly amended from P. Evans, 'Integrating Students with Special Educational Needs into Mainstream Classrooms in OECD Countries', *Prospects*, Vol. XXV, No. 2, 1995, pp. 201–18.

Developing countries cannot be expected to achieve the goals of EFA alone in any timescale, let alone that defined by Dakar, and particularly within a discriminatory international economic and financial framework. Governments in the South cannot be expected to achieve EFA on their own without the trading co-operation and financial support of the international community.¹⁸ Partnership at all levels is the order of the day . . . and years, with new tensions to be worked through, requiring well-articulated policies for human growth and capacity development.¹⁹ The countries will need to take ownership of the process and involve the communities, for whom the local service delivery is intended, in partnership.

But donors will need to help more too, in a context where per capita aid to Africa has dwindled, not increased, since Jomtien.²⁰ Although there are signs of radical rethinking among major donors such as the World Bank, the quantity, quality and the style of donor assistance will need to be subject to further radical change, not just cosmetic rearrangement. The days of donor-driven projects, neglectful of local knowledge and contribution, are thankfully coming to an end, and the 'driver's seat' of development is being vacated for those who have always been the rightful drivers; the countries themselves. This will all take time. Without doubt, in scale and complexity it is an enormous financial and logistic task which has to be undertaken in a context of the most abject poverty among almost a third of the world's population.

A concern with overcoming barriers to the access and participation of particular learners may reveal gaps in the attempts of a school to respond to diversity more generally, which may be seen as threatening by schools and teachers, but also by external agencies, and the managers and administrators of the system. As the Expanded Commentary on the Dakar Frame-

work for Action puts it, 'Since the pace, style, language and circumstances of learning will never be uniform for all, there should be room for diverse formal or less formal approaches, as long as they ensure sound learning and confer equivalent status' (World Education Forum . . ., 2000, para. 8). But in how many countries in this the case? And how many of those who advocate this know how difficult it is in practice? Some countries, such as South Africa, have adopted such a barriers-to-learning approach to their analysis of the implications of proceeding to inclusive education, but most have not.

Central to the concept of inclusive education is the theme of diversity: a pluralism of learners with a pluralism of needs. Of course, diversity in the modern world should not be a problem to be overcome by futile attempts to separate learners into groups, homogeneous in background and attainment. Diversity must be seen instead as a cause for celebration and a rich resource for teaching and learning. But it is not in many cases. All learners should be seen as having a right to an education in their locality. But they are not in many cases. Inclusion should be concerned with fostering a mutually sustaining relationship between schools and communities, for inclusion in education is a dimension of inclusion in society. But then, how many countries still practise state-authorized exclusion and discrimination, based on gender, ethnicity, religion and impairment?

A working definition of inclusive education

In countries of both the North and the South, there are still formidable obstacles to the inclusion of learners with impairments. Prejudices against so-called 'disabled' people continue to flourish, but of equal significance is the failure of many countries for financial or other reasons to put in place educational policies for all learners to participate fully within local centres of learning. In many countries of the South, it is clear that disabled learners are part of a much larger group of learners excluded from education, even though they may be singled out for disproportionate official or informal exclusion.

For this reason, for learners who are impaired to learn alongside others within their local communities on an equal basis requires the commencement of a process of creating learning opportunities for all children. But great care is needed in applying the concept of inclusive education, lest some groups and their needs be submerged within a monolithic concept and a monolithic provision and thereby further 'disabled'. Where the choice is between separate provision and no provision, where the appropriate learning opportunities might not be available in the locality,²¹ it is important once again to underline that all children have the same rights as all other children and the same human dignity.

For example, notwithstanding the emphasis placed on marginalized groups in the Dakar Framework for Action, no specific

statement on children with disabilities or special needs was made. In the current state of mainstream education even in many countries of the North, pushing these children from the agenda in this way runs the risk of inadequately reflecting the needs of those pupils who have special needs, but do not need separate provision. Diversity logically cannot exclude individual needs. Moreover, as argued above, there is always going to be a small minority of such students who will need separate provision, which cannot often be provided in the locality.

Thus, whether formal assessment is needed or not, and whatever credible system of allocation is used, in any worthwhile, honest and realistic definition of inclusive education both of these considerations – maximum inclusion with total provision for all – needs to be embraced.²² Currently, such separate provision can range from very little such provision, as in New Brunswick, Canada, or a highly differentiated provision, as in the Netherlands where there exist up to fifteen different types of special schools. Even in Denmark, for example, where through the developments in the *Folkeskole* in the 1970s and 1980s, perhaps the most vigorous and successful movement to inclusion has taken place, some 0.5 per cent of pupils still require separate provision.²³

Inclusive education is not just a matter of new descriptions for old problems. It is a concept that reflects the new age perspective of a new century; one which can encompass the drivers for change, the paradigm shifts and the newly evoked tensions referred to above and forge a response to them in the shape of a coherent strategy for achieving the long-cherished goal of EFA. In that sense it represents a sea-change from what was envisaged at Jomtien. In the context of the above definition, inclusive education is particularly aimed at 'removing all barriers to learning, and the participation of all learners vulnerable to exclusion and marginalization. It is a strategic approach designed to facilitate learning success for all children. In Box 4 a working definition of inclusive education is proposed, which takes account of the above complexities.

■ Box 4. A working definition of inclusive education

Within the goal of EFA, inclusive education is an overall strategy for addressing diversity in education. Taking into account the pluralism of educational needs of different learners, it seeks to provide every learner with at least a basic level of quality education throughout the cycle.²⁴ It thus encompasses a positive and dynamic process, which recognizes and celebrates the diversity of learners and their talents. It encompasses a unified continuum of provision of heterogeneous opportunities for quality and successful learning, suitable to the individual needs of all learners within a locality. Taking into account the special needs of individual learners, it has a particular concern to identify and overcome all barriers to participation and learning, for whatever reason, and to assist in proposing and designing strategies to surmount them. It has a special focus on those learners who are most vulnerable to marginalization and exclusion, including those who have physical or intellectual impairments or suffer social or other disadvantage.

Fixed firmly within a human rights perspective, inclusive education thus addresses the common goals of decreasing and overcoming all exclusion from the human right to education, at least at the elementary level, and enhancing access, participation and learning success in quality basic education for all. Barriers to learning may arise from the interaction of individual and environmental dimensions within any learning situation, for example the non-fit of the goals and values of the school and those of the community or learner, or those of the community and the system. Thus, the continuum of provision which inclusive education promulgates can be neither monolithic nor homogeneous, for even those learners with a manifest impairment, such as visual, auditory, physical, intellectual, emotional or autistic, are not homogeneous groups of students. Rather they vary in intelligence, capacity, application and human interests, and require a diversity of individually appropriate learning responses.

■ **Box 5. Inclusive education and the deaf child in South Africa: some dilemmas**

If deaf children were to be mainstreamed in a crude and mechanical way, the consequences would be unsatisfactory for the school as a whole and for deaf children. The use of sign language in the education of deaf children is the simplest, most effective means of access for them. A deaf child in a mainstream class would require an interpreter to sign throughout the school day, which is extremely cost-intensive. And yet, schools for the deaf in South Africa have not provided education that is equal to that provided in mainstream schools. Thus, there are fairly compelling arguments for the abolition of schools for the deaf. However, there are also compelling arguments for maintaining schools which deaf learners see as social learning centres in which they can construct and develop their culture. Schools which are sign language medium schools providing deaf learners with equal access to education are inclusive and equitable.

*Source: Quoted seriatim from UNESCO Pretoria Office, *Inclusive Education and the Deaf Child in South Africa*. Pretoria, South Africa, 1999, p. 10 et seq.*

Concept characteristics of inclusive education

Advocacy of inclusive education implies neither the neglect of the universe of special needs, especially of those who may be physically or intellectually impaired learners, nor the total abolition of separate provision where that is required by the physical, intellectual, language or other conditions for some learners. For such a step might destroy the central goal of inclusive education, namely providing for the educational needs of each and every learner, in the form of appropriate and accessible learning opportunities of quality, adapted to the achievement of success and enjoyment in learning for each individual, if possible in the immediate locality.

Inclusive education thus cannot be a single 'fit-all' prescription for the needs of all children, all communities, all countries or all systems. Indeed the learners to be encompassed range from those with mild learning difficulties or social disadvantages to those with severe disabilities, those with temporary or more permanent learning problems, those with emotional or social problems, and those who are very gifted. The needs are complex and wide-ranging. In some cases, the condition evoking the difficulty is well understood and responses are well charted. In others, as with autism, human knowledge still has some way to go before full understanding can be claimed.

Thus, in systems dedicated to following inclusive policies, while the needs of most children can be met in mainstream schools, where separate institutional provision does continue to respond best to individual needs, such provision is seen as part of a holistic, interactive continuum of institutional and curricular access. In other words, within a unitary institutional and broad, balanced and responsive curricular framework, all components are valued and considered to be agents of learning, co-operation, development and personal growth for all children.

In some instances, there may also be transition, either temporary or permanent from the mainstream school to more specialized responses in the form of a unit at the mainstream school or separate provision. For children with complex needs or specific and profound disabilities or medical conditions, other institutions and organization will need to be involved. So a ring fence around mainstream provision of inclusive education is neither desirable nor practicable. But, increasingly countries are accepting, that wherever that provision is located, it should involve the parents and either directly or vicariously via a proxy the 'ascertainable wishes of the child concerned' (United Kingdom, 1994, p. 3).

For this reason, while they all rest on the same philosophical foundation of human rights and respect for persons and their learning diversity, seen as enriching personal and social development, the concept characteristics of inclusive education cannot be read as a prescriptive all-encompassing recipe, to which all countries, all schools and school systems will adhere. Nor are the concept characteristics fixed for all time and for all places, and all socio-economic and cultural contexts, for inclusive education is a process rather than a state.

Starting from where they are now, based on the above principles, and taking into account local conditions, traditions and potential, human, physical and financial, as well as local traditions of education, each country, system and school will need to commence the journey along the path of inclusion in its own way and according to its own social and cultural traditions and its own human and physical resources. It is in this context that a provisional and initial list of the concept characteristics of inclusive education might include those itemized in Box 6. ■

■ **Box 6. Some basic concept characteristics of inclusive education**

- Inclusive education embraces all learners;
- More flexible and responsive schooling in its organization, processes, timetable, content and monitoring, if possible within the locality;
- Ongoing strategies to identify and overcome exclusion and marginalization, for whatever reason;
- The substitution of a pedagogy of progress and success for the currently dominant pedagogy of failure in many countries, particularly of the South;
- The delivery of the necessary quantum of timetabled instruction and time-on-task, as part of an interactive pedagogy, 'state-mented' if necessary, and with adequate opportunities for autonomous and group learning.
- The provision of an adequate learning environment, including ventilation, illumination, water and sanitary conditions, as well as a sufficiency of appropriate furniture;
- The improvement of the quality of primary education, including through improvements in professional initial and in-service training, and administrative and advisory support;
- Provision of appropriate, culturally and socially sensitive, and sufficient textbooks and other educational materials for each child and class, as well as the necessary accompanying materials for each teacher;
- Greater responsiveness to consumers, particularly the poor and rural populations;
- Shared community responsibility for the provision, management and supervision of schooling on the basis of a social contract between the relevant Ministry and the local community, which defines the responsibilities and rights of both;²⁵
- A more 'child-centred' and interactive concept and practice of education, responsive to the diversity of children's needs and their varying potentials;
- Recognition of the wide diversity of needs, rates and patterns of development of children, demanding a wider and more flexible range of appropriate teaching/learning responses; and,
- Commitment to a developmental, intersectoral and holistic approach to the education and care of school children and young people.

Source: The World Bank (2000), *The World Development Report 2000/2001*, Washington, D.C., 2000.

Barriers to participation, inclusion and learning

Barriers to inclusion: a macro perspective

At the base of the strategy of inclusive education is the concept of barriers to learning. It is this that defines the first and major task facing inclusive education: identifying and overcoming all barriers to inclusion. That concept of barriers to learning is at the same time a rationale for the adoption of measures to move more quickly towards inclusive policies for the whole education sector. The notion of 'barriers to learning and participation' involves asking questions, such as: What barriers to learning exist at each level of the education system, systemic, institutional and individual? How can such barriers be identified and confronted? Who, in particular, experiences barriers to learning and participation? How can barriers to learning and participation be minimized or overcome? What are the resource implications of addressing the barriers? What is the most cost effective way of addressing such barriers? What different kinds of resources are needed? Human? Material? Educational? How and at what level can appropriate resources be mobilized to support learning and participation at each level of the education system? But it also must pose the question of what barriers to inclusion exist within the wider society.

There may be barriers to learning and participation at all levels of education and associated social systems. Evidently, such barriers are manifold and complex, but it is the task of inclusive education to seek them out, to identify coping strategies and to overcome them. Countries and areas within them will vary in the extent to which barriers to education and learning relate to such major issues as the structure of the education system, the ethos of the system and the school, the curriculum on offer, the competence of the teaching force, its professional support and training, and the pattern of attendance or absence of teachers,²⁶ the climate and daily routine, mother tongue or instructional language policy, particular health needs, nutritional problems, gender issues, homelessness, child abuse, economic and family circumstances, local and national policies, economic circumstances and priorities of governments.

They will also vary in the way and extent to which such barriers relate to the wider infrastructure of value in society. For, in some cases, the barriers will relate to factors outside the formal education system, such as political or social attitudes, religious, racial or ethnic prejudice and gender discrimination. In other cases they may represent the conventional wisdom of a nation or the international and bilateral agencies. There are many

barriers to the adoption of inclusive education at the macro level of each learning system, some of which have been mentioned above and listed in Box 7. But there also many other barriers, located more centrally within the education system itself, such as financial and resource considerations, individual learner factors, institutional learning centre characteristics and pedagogical or instructional aspects, as well as intellectual problems of definitions and categorization and the use which we make of these generalizations as educational professionals in our daily decision-making and judgements. Each of these groups of more narrowly educational barriers is addressed in turn in the following sections of this report.

Financial and resource barriers

One of the most familiar and powerful arguments against the movement towards inclusion in education is still based on financial and resource considerations. These arguments undermine the development of effective financial planning strategies that would favour inclusive education, because they rule greater inclusion out *a priori*. It is argued that both mainstreaming all those currently marginalized or excluded, and making provision for the inclusion within the education system of those with very special educational needs, not necessarily within the regular school, will 'blow' the education budget and increase the unit cost of provision to unsustainable levels, especially for those countries already burdened by poor economic performance on the world market and by insurmountable debt.

Convincing evidence is not yet available, but it does seem to be common sense that those with more severe and complex needs will require additional resources. The jury is still out on whether some children previously excluded from the ordinary classroom can be mainstreamed without additional costs, but it does seem conceivable that savings of scale would be available. On the other hand, all such learners have an equal right to be provided with the necessary education to live a dignified life. They do not have less human rights because they have more educational needs, which may require additional resources. Governments and donors alike may, therefore, have to accept that affording all citizens their human rights has financial costs and that students with disabilities demand a more than proportionate share of the budget. But then, not affording them their human rights also has costs too.

Moreover, the problem of diversion of state and agency funding, otherwise known as corruption, is still a serious problem in many countries, as is witnessed by the extensive and commendable World Bank website on the subject. But progress is being made. Debt relief has now been offered to twenty-two of the world's poorest countries, and donors are introducing the tracing mechanisms that can guarantee that

■ Box 7. Some factors inhibiting the development of inclusive education

- Macro-economic policies inadvertently or directly restrict development of primary education for all by being insufficiently discriminating in defining protected populations.
- Disharmony between legislation, declared policies and espoused financial provisions.
- Government and/or donor failure or unwillingness to accept the case for increases in finance to accommodate greater diversity and school the excluded.
- Insufficient inter-sectoral/inter-professional co-operation and donor/government co-ordination.
- In spite of declared policy, primary education often not free, sometimes indeed rather expensive, even excluding opportunity costs.
- A pedagogy of failure dominates the whole education system.
- Lack of fit between educational provision and diversity of needs and life styles of many families and children, e.g. timetabling, centrally prescribed curriculum, etc.
- Professional defensiveness, where a wide diversity of needs demanding an equally wide diversity of responses, causes fear, irritation, tensions and confusion among educational personnel.
- For reasons of cultural or social difference or economic activity, some groups reject formal schooling or are unable to 'take up the offer'.
- Poverty means that the simple economics (direct and indirect costs) of educating children from poor families and parents dictate exclusion.
- Cultural misfit, where dysfunctional authorities, teachers and schools show a lack of responsiveness and flexibility of educational provision and management.
- Management, co-ordination, evaluation and dissemination of innovative initiatives related to inclusion are inadequate.
- Governments, agencies and NGOs have adopted policies that favour secondary and higher education in contradiction to their declared commitments and plans for basic education for all.

aid is well spent. Equally, however, compensatory financial policies, whether grant or concessionary loan, on the part of the world's more wealthy nations will be insufficient alone for the final push to EFA. For that, a more level economic playing field, an end to the cherry-picking of human resources from developing countries, a vigorous reassessment of donors' financing priorities and acceptance that, for the poor to have more the rich will have to have less, will be required.²⁷ Over and above these macro-economic issues, this text recognizes the potential expressed in the Salamanca Statement, that, 'regular schools with this inclusive orientation . . . improve the efficiency and ultimately the cost effectiveness of the entire education system' (World Conference on Special . . ., 1994, p. ix). They also deliver a pay-off in terms of avoidance of long-term dependency costs for families, communities and societies.

■ **Box 8. Catering for children with disabilities in Ireland**

'As with social and economic disadvantage, it would be policy to devote a higher than proportionate share of resources to the special needs of children with disabilities. Dealing with this problem effectively involves a recognition that there is a very wide variety of different needs, and that the needs of individual children will change from time to time. Consistent with this, the approach would be committed to having as many children as is appropriate in ordinary schools, backed up by a range of facilities, including special schools, which children could draw on as necessary. The greatest possible flexibility would be aimed for, with children moving from ordinary schools to special schools and back again, as their needs dictated.'

Source: Ireland, Ministry of Education, Education for a Changing World (Green Paper on Education), Dublin, The Stationery Office, 1993, p. 8.

There are also optimistic signs of a fuller recognition of the urgent need for additional funding and for better targeting of resources by donors on countries, on phases of the reform process and on components (Devarajan et al., 2000). Debt forgiveness is commencing, some bilaterals are moving towards sector-wide approaches, debt purchase combined with sell-back on condition of utilization in the social sectors has been tried by some agencies, international organizations are improving their targeting and prioritization and safety net strategies, and NGOs and bilateral and international agencies are promising to increase their funding for basic and primary education. Moreover, the baseline fact is that all children have an explicit human right to education and, in the presence of profligacy in the provision of elite forms of education, the argument against making provision on financing grounds alone must be considered spurious. For example, many countries still have subsidized higher education, including generous grants and feeding programmes, supported by donors, and with little or no beneficiary contribution, at the same time as they maintain that they have insufficient funding for basic and primary education for all. Further, in some countries, Ministries of Education still substantially under-spend their own budgets and funds allocated from donors and other agencies.

Capacity development for more holistic and successful strategies for the financing of education by government and donors are being implemented and, in some cases, the strategies are in the process of implementation. Appropriate technical assistance combined with effective and sustained policy dialogue is improving policies and helping to maintain the all-important in-country political support for reform. Evidence seems to suggest that the key to successful donor assistance may lie in greater donor focus on co-operation than on competition and more on knowledge creation than on disbursement of money, with a precursor change of culture and incentive structure in donor agencies (World Bank . . . , 1998, p. 116). Partnership is certainly a major dimension of the dialogue of development, although the actual implementation lags till behind the rhetoric.

Nonetheless, in some cases, donors and governments have combined to simplify and streamline their approach to educational resourcing, including EFA, through a sector-wide approach (SWAp),²⁸ which gives government greater control and flexibility in the use of external resources and reduces the number of agencies, forms and occasions on which governments need to be accountable. A number of African countries have already pioneered a holistic approach through the Comprehensive Development Framework with the World Bank and other donors. Such approaches save scarce human resources, whilst maintaining the accountability of governments for the external and other funding, which they receive. Some countries have begun to make coherent and explicit their policies and legislation for the inclusion of all children and have matched them with appropriate financial plans and reforms in regional and local government.

But the mechanisms are also important. For one thing is certain: the methods, channels and criteria for funding adopted by local and/or national authorities can either facilitate or inhibit the process of inclusion. For example, a study of inclusionary policies in seventeen countries indicated that if funds are not allocated in line with an explicit inclusionary policy, inclusion is unlikely to happen in practice. The mechanisms of financing explain discrepancies between general policies on inclusive education and the practical organization of inclusion. The study concludes that the countries having the most attractive funding option in support of inclusive education are countries with a strongly decentralized system where budgets for special needs are delegated at the central level to regional institutions (municipalities, districts and/or school clusters). When the allocation of funds to separate settings directly influences the amount of funds available for mainstream schools and when the school support centres play a decisive role in the allocation of funds, this seems to be effective in terms of achieving inclusion (European Agency . . . , 2000).

At the systemic level, governments and donors need to examine their own role, their financial priorities, and their often complex and over-demanding allocation mechanisms and identify the continuing serious inequities in access to the benefits of investments in education.²⁹ Disability and exclusion are social issues and the state has to have a central role in overcoming their exclusion and resourcing it. Fortunately, more and more donors are now seeing the government 'in the driving seat'. All staff throughout the education system need high level training in the goals and implications of inclusive education if they are to make the right decisions about what to support and how.

This development demands new regimes of management, training and support from the state. Schools, teachers and ministries need to cater to individual needs and not just to seek to offer a standard packaged programme for all, in a context where most governments through their ministries still tightly prescribe the curriculum and examinations. Yet, there can be no doubt that the local level is the effective key to the implementation of inclusive approaches to education and beyond to effective poverty reduction.³⁰

Barriers to learning: an individual perspective

Even if the above barriers to inclusive education were surmounted, looked at from an individual perspective, many barriers would still remain. In Eastern Europe, for example, a physically disabled but bright girl, member of a Roma family, using a different language at home from the language of instruction in school, living in abject poverty in a temporary settlement on the edge of an urban area, separated by a wall from the neighbouring community, facing intense and prolonged ethnic discrimination and in some cases violence, has multiple barriers to surmount to achieve her full rights and potential. That is even if the local school is adequately resourced and staffed and receptive.

Or a girl child aged 6 to 9 in the mountains in Nepal, who may have a minor physical disability, is the only girl in the family, does not speak or have any experience of the national language, Nepali, comes at the end of the food priority chain, is expected to work twice the number of hours per day as her brothers of similar age, or her 'sisters' in the Terai. The school is in the next village, the teacher is from an urban, high caste background and does not speak the local language, her parents think that the most important thing for their daughter is to get her married, and in any case, there are fees for schooling, and the family consider it much more important that the scarce resources should be allocated to paying for at least one of the boys. No simple, single categorization will suffice.

Barriers may be associated with those impairments, for which clear biological reasons are often manifest, such as pupils with sensory or physical impairments, or they may related to those with profound and multiple learning difficulties, which are not easily susceptible to categorization, or to something as intangible as age-old prejudices against girls or certain cultural groups, for example, the Roma in Eastern and Central Europe or lower castes in India or religious minorities in Pakistan (Daunt, 1993). In some countries, minor facial disfigurement, such as a harelip, is sufficient reason for exclusion from school. In others, it may merely be that the child is a girl.

Learners who experience barriers to learning and participation include learners in poverty, those affected by war, forced displacement by government and other development projects, and environmental degradation and change, learners who are victims of abuse and violence, street children and those in difficult circumstances, children being brought up outside their own families, children in abusive forms of child labour or outright bondage, itinerant or nomadic populations, learners with impairments, girls in situations where their education is seen as less important than that of boys, learners affected by HIV and AIDS, either themselves or through the loss of one or both parents, or affected by other chronic illness, child heads of households, children in work bondage to repay family debts, learners from oppressed groups and subjected to racism or other forms of discrimination, girls who are pregnant or have young children, learners whose home language is different from the language of instruction, etc. But it is important that the above groupings are not and can never be considered to be exhaustive and homogeneous, or further barriers will be erected.

Institutional and pedagogical barriers

Barriers at the school level may relate to such items as: dysfunctional schools,³¹ timetables and school calendars that are inappropriate to local circumstances. There may be double shifting because of shortage of accommodation or teachers, which reduces quality and time for learning. Teachers may be frequently absent, because every month they need to travel to a distant urban centre to collect their salary. There may be insufficient human and professional sensitivity and inadequate training or language and social skills on the part of teachers. In a number of developing countries, teachers are expected to teach in a foreign language because a bilateral donor has placed a premium on the use of a metropolitan language in the school system. This also can constitute an almost impenetrable barrier for children who never hear the language, let alone understand it. Furniture, educational materials and text and exercise books may be inadequate, in short supply or not available.

There may be inadequate capacity and facilities within schools to take all the pupils who wish to attend, because of the presence of large numbers of under- and over-age pupils. This causes a 'push-out' effect on further enrolments, keeping those who are entitled to attend from enrolling. There may be an absence of proper hygiene in the form of appropriate latrines, derelict or otherwise inappropriate classrooms, with inadequate ventilation or lighting for young eyes to read, lack of appropriate furniture and other facilities, insufficient textbooks, no exercise books and other educational materials, lack of committed, well-trained and attending teachers.³² In some countries, the vast majority of schools, over 95 per cent in one case, do not have access to pure drinking water on the school site.

■ Box 9. Overcoming the barriers

Kien is one of over 26,000 children with impairments who have been integrated into mainstream schools since 1991. He was provided with a wheelchair through the support of UNICEF and Radda Barnen in time for him to start school in 1996/97. Now his classmates help him by pushing him to school. Thirsty for knowledge, he has made excellent academic progress, in spite of severe motor difficulties which prevent him from holding a pen or pencil. Prior to his arrival the class teacher had received training in methods to facilitate integration. After just two months in school, he knew all of the letter sounds and names, and by the end of the year he was reading well. He also acquired a reputation for the formidable speed of his mental maths. He moved onto the second grade with ease and continues to make very good progress.

Source: Radda Barnen/Catholic Relief Services/Save the Children UK, Inclusive Education in Vietnam 1991-8. Stockholm, 1998.

Inappropriate teaching/learning strategies, poor initial and in-service teacher education, and lack of continuous professional support and advice may reduce the effectiveness of instruction and learning. Sometimes, culturally or linguistically exclusive teaching methods, instructional materials and learning methods, irrelevant or prejudicial curriculum content, and conservative attitudes and values, based on stereotypical representations of human nature, may impede the participation of some children. The teacher may take insufficient account of the special needs of those with sensory impairments or consider 'retarded' those who require different responses and approaches. In some cases, it is poor delivery to the school level which can frustrate even the efforts of a school sincerely committed to inclusive policies, through central insistence on outdated and dysfunctional epistemologies and curricula, and through inadequate systems of management, financing, supervision and administration which inhibit the development of a truly inclusive system.

Barriers may grow from dysfunctional professional knowledge and categories which vie against inclusion or from the absence of appropriate knowledge for decision-making. In eastern Europe, for example, the dominant medical approach to categorization, assessment and intervention, inherent in the defectology approach of the former Soviet Bloc, limits the conceptual frameworks used for understanding exclusion and thus provides a major barrier to reform and inclusion (Ainscow and Haile-Giorgis, 1999, p. 118). Barriers may be related to the politics or practice adopted by professionals or individuals of assessment or the placement of students in individualized education programmes (Keary, 1998). They may be related to the difficulty and unresolved dilemmas inherent in trying to reconcile equity and participation within the same school or system (Clark et al., 1997). They may also relate to the politics and hidden agenda of systems, the service delivered and the personnel who deliver it.

Ostensibly too, overtly participatory and supportive professionals may construct deliberate or inadvertent intellectual or professional barriers, which disempower and disable the very families and children for whom they declare their support.³³ Sometimes too, communities themselves, through ignorance or prejudice, may construct their own barriers to their own development and education. All of these barriers can restrict the fair and equal distribution of the benefits of the education system to all children.

But, there are countless examples in a number of different countries which show that, with appropriate practical measures aimed at integrating all learners into learning centres, none of the above barriers need to be insuperable. For example, barriers excluding children with impairments from mainstream schools, traditional prejudices inherent in communities, inadequate teacher preparation and support, and all the other barriers to learning cited above can be successfully challenged and overcome, encouraging a more positive inclusive orientation to the benefit of all learners and teachers.

■ **Box 10. A contract approach to the involvement of a community in a school improvement plan**

The Malagasy Government has pursued a policy of engaging local communities in a potent partnership to improve their own schools. An elected school council was given the responsibility for the preparation of a school contract, jointly with the local authorities, such as the local inspector and other educational personnel. They specified in common the aims, objectives and commitments of each party to the agreement, the timetable and the estimated costs, including items such as: a) the construction or rehabilitation of classrooms, latrines, water points, lodgings, etc.; b) classroom furniture or equipment; c) the activities of training or professional development for lay or professional staff, including members of the school council, the head teacher and teachers; d) the follow-up of the implementation of the contract; and e) the evaluation of the results, i.e. the improvement in the enrolment and learning of the pupils

The contracts specified the commitments of the *local community* through: a) the provision of basic materials; b) the payment of a part of the labour costs in kind or in money; and c) participation in the management of the schools; of the *head teacher and staff of the school*, such as a) to respect school times and timetables; b) to prepare the necessary tests and to mark work in an equitable and transparent manner; and c) to ensure the cleanliness and maintenance of the school; and of the *authorities*, such as a) to ensure a sufficient number of teachers of a given quality for the school; b) to provide construction materials and technical assistance for the construction or rehabilitation of the classrooms; c) to provide educational advisory and support services to the teachers; d) to ensure a regular follow-up of the functioning of the school; e) to pay the teachers regularly and on time at a place which is nearest to the school; and f) to recruit and deploy the necessary teachers to the school.

Source: Based on D. Viens and J. Lynch, 'Madagascar: A Developmental Approach to Community-Based School Management', *Findings*, No. 175 (January), 2001 (World Bank Africa Region).

Indeed, just as a community may be a source of justification of exclusion, communities themselves can, with appropriate encouragement, resources, procedures and professional involvement become a powerful resource to overcome exclusion and to foster more inclusive education systems and learner centres. Inclusive educators are increasingly recognizing and engaging with the social capital at local and institutional levels, customizing practices to local circumstances, turning over the task of reform to local stakeholders, learning from elsewhere but not necessarily importing it lock, stock and barrel, and achieving such results as those illustrated from the Malagasy example in Box 10.³⁴

Barriers of definition and categorization

Everyone and every language uses generalizations to impose order on a complex and confusing world. Such generalizations and the scientific and other categories which we use in our daily lives are an essential element in controlling our environment and relating to other persons in our community and

society and wider afield. But such generalizations and categorization are also a source of potential danger, of potential intellectual enslavement to stereotyping, prejudice and discrimination. And therein lies a further dimension of potential barriers to full and effective inclusive education. For, there are also barriers associated with definitions and the categorization of learning needs and desirable educational responses. For example, notwithstanding international and national efforts to clarify, classify and clean up the terminology in the field,³⁵ some of which are based on the problematic concept of normalcy within a given culture, there are still major problems of definition, assessment and action, reported at all levels. The concept of normalcy, for example, can mean acceptable in many cultures as well, and this can inhibit measures to achieve full inclusion. The obverse of the normalcy syndrome is the abnormalcy syndrome, where there may also be assumptions on the part of teachers and other educational personnel, that all within an apparently identified category are homogeneous.

For instance, pupils with a hearing impairment as a result either of conductive deafness, caused by an obstruction or abnormality in the outer or middle ear, or by sensori-neural or nerve deafness, caused by an abnormality of the inner ear or auditory nerve, do not all have the same intellectual or artistic gifts. Some may be very gifted. Others may be less so. According to whether they are mildly, moderately or severely hard of hearing or profoundly deaf, will depend their susceptibility to be institutionally mainstreamed. But the decision about their fullest possible curricular inclusion will depend also on their intellectual capacities. Similarly, with pupils with a visual impairment, with causes ranging from congenital blindness, cataracts, albinism, retinitis pigmentosa or tumours. Most of these pupils will in fact be partially sighted and may be able to function in the mainstream school with the help of low-vision aids. But some with minimum residual vision or who are totally blind will need to work through Braille for reading and writing. Again, their abilities and intellectual capacities may be totally unrelated to the level of their impairment.

The term 'children with special educational needs', referred to earlier in this report, was given wider currency partly through the publication of the *Warnock Report* in the United Kingdom, (Committee of Inquiry . . ., 1978) a usage which sometimes overlaps with the term 'the academically delayed learner'. It is often sloppily used and vaguely applied by teachers and other educational personnel. The perceived characteristics may vary, but children perceived as being within the term, 'special educational needs', are often described by teachers as being uncooperative, lethargic, inattentive, slow to learn, absent-minded or easily distracted. Often the term is used for those children, for whom the teacher's teaching/learning strategies have failed or for whom no other 'category' is available. But, such children are usually located across the ability range, and their poor performance may be caused by either environmental or innate problems or the interaction of the two.

The presence of children categorized as having special educational needs can be remarkably high and this fact alone may be seen by some teachers as a rationale for the high rate of drop-out or repetition in their classes. Sometimes attribution to this category is the result of no more than a misfit between the teacher's teaching/learning strategy and the learner's learning style. Sometimes, the phenomenon is caused by no more than underachievement, deriving from such causes as dual or multiple language systems, wherein children learn through a second or third language and teachers teach in a language, which they have not mastered sufficiently to be able to simplify and explain in multiple ways what needs to be learned. Children in this situation will clearly fare less well in such systems for a number of reasons, some of which may be totally unconnected with their ability or inherent capacities. The same problems of labeling can occur with the terms integration and mainstreaming, if they imply that children with disabilities are invited into provision, which is really intended for others and not a place where all will share on an equal footing, that they therefore must fit into the school and not the school to them.

In Bangladesh, for example, some studies have found that as many as 90 per cent of the children who participated in a study were described as having learning difficulties in the areas of listening and speaking, and about 70 per cent were described as having difficulties in writing (UNESCO, 1998). However, it was observed that the deficiency in reading and writing skills was due in large measure to the teachers' failure to teach these skills explicitly. These children could have progressed as a result of more systematized and individualized instruction, a flexible, more relevant curriculum and environmental interventions by the school. These learners may have no impairment as such, but are disabled from learning and schooling by the use of a generalized category which camouflages the failure of the school and the teacher. They are, therefore, excluded and marginalized.

In addition to the children above, there are many other learners who are typically excluded or marginalized, for example, children with specific learning difficulties such as, dyslexia (difficulties with reading) or dyscalculia (difficulties with number) or dysgraphia (problems with writing). These learners may have difficulty in either learning to read, write or succeed in other language tasks, or to do mathematics or they may have spatial disorientation, unrelated to any concept of innate ability. Yet often they are the subject of labeling and exclusion, although generally their difficulties can be relatively easily addressed. All that may be required to enable these children to reach their full potential may be imaginative and stimulating teaching methods and strategies, delivered creatively and in slightly different ways. Sometimes their learning difficulties may be effectively dealt with through strategies such as the use of alternative visual or aural stimuli, a different regime of incentives, regular monitoring, linked to additional motivation and reward strategies, regular additional coaching from a specially trained remedial reading or arithmetic teacher within each mainstream

school. With such interventions, these learners also can be helped to remain and learn within the regular class and school system, and to achieve a satisfying level of success.

Terminology can condemn learners to failure. In some cases, professionals advocating the importance and value of the individual, themselves sometimes use terminology which 'herds' together indiscriminately and depletes the individual humanity and needs of each learner (Low, 1995). The secondary application of such terminology by teachers and psychologists of fluid, provisional, perhaps only partially perceived and uncertain definitions and assessments needs to be taken into account with modesty by those responsible for the construction of educational responses to mainstream learners according to individual needs. Reports still illustrate the confusion of terminology and its application which can in fact construct barriers to learning.³⁶ The distinction and the interaction between temporary and permanent barriers need to be better understood. They need to be continually and carefully monitored for their relevance to the individual learner's programme. Thus, for all the above individual learners and for all the above reasons, but also because of its own youth, lack of realism, clarity and operational potential, inclusive education faces many serious scientific challenges and barriers, if it is to move from the realm of rhetoric to the domain of reality, from the plane of declared to that of operative values.

Insofar as inclusive education is to be effective, professionals have to cede some of their autonomy and engage in a closer learning partnership with parents and communities, what we call 'interlearning'. Language, categories and definitions have to be 'laicized', so that parents and communities can also take on extra responsibilities and engage with teachers and other educational professionals. Education ministries through their provincial and local agencies, if need be, have to engage with teachers, schools, parents and communities, and to relax their vice-grip on curricula, examinations timetables and school calendars, all of which can constitute powerful barriers to more inclusive education systems.

Curricula need to recognize social and life skills for the needs of the economic activities and social conditions of the locality, as well as academic achievement. They need to embrace both content and process, cognitive and affective domains. At the same time, educators need to rethink what is success for any one child and to discard their pedagogy of failure and unscientific examination. Inclusive educators have to recognize that exclusion is complex and that the factors are many, involving many different groups in many different ways. Inclusive education is a process, not a state, and the movement from a medical model to a social model of disability has a long way to go to be accepted and to have practical consequences.³⁷

The tensions between the needs and rights of the individual and requirements of the group are an ever present challenge to

■ **Box 11. National policies to encourage responses to diversity: the Golden Key Project**

Since 1996 in Guangxi autonomous region, the former special school for children with visual impairments has served as a central resource for a project to integrate children with visual impairments into local mainstream schools and their own communities, providing practical resources and training such as Braille books and special recording materials. Prior to the project only some 500 children were enrolled in school. Following on the project, some 1,700 children with visual impairments have been mainstreamed and have benefited from the support of teachers trained in the project. There have also been benefits to the community in dispelling long-held prejudices.

Source: UNESCO, Inclusive Education on the Agenda, Paris, UNESCO, 1998.

teachers. They represent equal competing values underlying inclusive education and bringing their own dilemmas. The tensions between the need to identify, assess and define, and the danger of stereotyping or labelling are also ever present. Schools earnestly pursuing policies of inclusion may fail because of the internal opposition of their teachers or because of failings in external management and support of the school, deriving from lack of policy clarity. Whether in school or system, managing inclusive education is a difficult and complex process, which needs to take account of our inadequate and sometimes quite unstable language and means for apprehending learner reality, of limited teacher apprehension and expertise in the use of that language, and the attitudes which confusion or incomprehension may generate among professionals and parents, as well as expressed ideals and goals of inclusive education (Clough, 1998).

In this section, the dangers associated with definitions and categorization has been underlined, while at the same time, it has been recognized that they can be important and essential professional instruments in assessing the kind of schooling that best suits a particular learner. They are, however, only one set of servants to professional judgement in the interests of the learner and must never become masters of professional judgement and decision-making. Such definitions, used slavishly and deriving from a particular often silently subliminal model, can generate barriers, which inclusive education has to confront realistically, if it is to offer a strategic momentum to the movement to EFA and justice and human rights to all learners. Of course, these problems of definition and lack of clarity are not uncommon. They also occur in international reporting concerning the rights of children with impairments, impeding their full recognition as particularly vulnerable learners.³⁸ But this fact only serves to emphasize the fact that even greater care is needed in the use of terminology by those advocating 'inclusivism' in education, which is a relatively new and, therefore, unfamiliar concept, which could carelessly generate its own conflicts, fears, 'hang-ups', and dilemmas and categories.

A 'social model' of difficulties in learning and disability

In the previous sections of this report, inclusive education has been defined and the barriers to the approach to learning inherent in inclusive education has been described and illustrated. The dangers of categorization and definitions in the previous medical model of impairment have been illustrated and a caveat entered for those advocating policies of inclusive education. Without denying the need in some cases for medical support and interventions, it will be apparent from those sections that the underlying philosophy of inclusive education is one more towards the social end of the spectrum than to a medical model of disablement. The way in which definitions and categorizations, and secondary interpretations of definitions and categories used by teachers and others can cause barriers to learning has already been discussed above in some detail. But models of responses to impairment also generate their own definitions and categories.

The formerly dominant and exclusive medical model of 'handicap' is now well institutionalized in almost every language and there is a considerable hangover of its apparent explanatory power, still active in the field. That model posits the idea that the reason for learning difficulty is to be found almost exclusively within the learner, and it places the major onus of adaptation on the learner and very little of the institution. It is a model which is proving very difficult to change, although there is increasing recognition that it can only ever offer a very partial rationale for professional judgement and educational decision-making. Furthermore, there is an additional disadvantage in the use of the model, insofar as exclusive reliance on it tends to exclude the view of those with impairments and posits a view of normalcy, which implies acceptability and, therefore, disempowers the very persons it is intended to assist.

For the purposes of this report, and according to a strict definition of the terms, 'disabilities' are barriers to participation for people with impairments, or chronic illness. Such impairments are sometimes inadvertently allowed (and even sometimes employed) to disable learners from their right to learn. Impairments can be defined as a long-term 'limitation of physical or mental or sensory function'. Disabilities are created by the interaction of discriminatory attitudes, actions, cultures, policies and institutional practices with impairments, pain or chronic illness. While it is often difficult or impossible to overcome the impairments of learners, a considerable impact can be achieved in overcoming the disablement; the physical, personal, intellectual and institutional barriers to their access and participation.

As indicated above, there is considerable variation in the definition and identification of different impairments across nations, and between the centre and the periphery in individual countries, which can itself construct barriers to access and disabilities from entitlements. It is instructive to note that

one of the major motors to integration has been the revelation that so many children were allocated to special education provision on the basis of what have been called spuriously scientific classifications, resulting in extra expense, poor adjustment and inferior academic learning.³⁹ That unsatisfactory situation, combined with lack of clarity concerning who is responsible for the designation and accommodation in the form of individual education programmes, evokes important dilemmas for professional judgement. For an individual programme to be designed, an identification of needs has to be carried out on the basis of an existing mental and intellectual framework, or an alternative has to be devised.

But the very act of undertaking that task can raise new barriers, not least in the form of professional demarcation disputes. Teachers may feel that those thus defined are the province of special teachers, not the responsibility of the ordinary classroom teacher. As a consequence, a sense of either rejection, on the one hand, or of inadequacy, on the other, may be evoked on the part of those teachers (Emanu and Persson, 1997). Alternatively, professionals may either deliberately or inadvertently use the intellectual frameworks by which they work, their paradigms, to disempower parents and learners, and thus to 'disable' them. Thus, the issue of definitions and their use is not just a theoretical one, but for the children and their parents a very real and practical one.

The use of the concept of 'barriers to learning and participation' for the difficulties that learners encounter implies at least a modified social model of difficulties in learning and disability. It does not represent the total exclusion of medical expertise and professionalism, where it continues to respond to individual needs. The social model of disability has been strongly advocated by organizations of disabled people around the world, although its implications for understanding difficulties experienced by learners in education have been less explored. According to the model, barriers to learning and participation arise through an interaction between a learner and their contexts: the people, policies, institutions, cultures, social and economic circumstances that affect their lives. This reflects a clearly more logical position than attributing all impediments to access and learning to the individual learner, which can often arise in the case of dysfunctional schools and systems. It also enables the use of a relative handicap concept, where handicap is seen as the result of interaction between individual characteristics and environmental demands, where the handicap arises when the demands exceed individual capacity.

The 'social' position also accepts as normal that children are differentially ready for different kinds of learning at different times and stages, depending on their own individual capacities, abilities and determination, not just on the basis of their impairment or impairments. A restrictive educational environment and the shape and style of learning opportunities presented to learners may also inhibit their learning, sometimes frustrating them because of its inherent assumption that they

cannot be gifted or intelligent if they are impaired. Of course the circumambient social, political and cultural conditions, themselves in some cases the legacy of lack of education, may predetermine learners' abilities to capitalize on any opportunities offered, as in the example given in the box below, where impairment may be seen as a stigma and source of shame for the family and community.

■ **Box 12. Disability as contagion**

A study of attitudes and practice in a government primary school in Rajasthan revealed barriers to the integration of disabled children in the form of uninformed attitudes. The locality has a high incidence of cerebral palsy, mental retardation and mental illness, yet only two disabled children have been integrated into the village school. A major barrier seems to have been the attitudes of the local community to disability. There is fear of disabled people who as a result are largely kept out of sight indoors. People believe that disabilities can be caught and that 'infection' will spread to other children. Segregation was the only solution. Interestingly, many mothers, in response to growing concern about the threatening social environment, advocated segregation of both the disabled and girls to keep them out of sight.

Source: D. Nair et al., Education in a Conservative Society: Perspectives of Children and Adults, New Delhi, 1999.

Schools have complex and conflicting responsibilities, being both products of their cultures and cutting edges to change that culture. That is why involving the local community, local knowledge, and local and informal communication channels is essential in any movement towards inclusive education. Thus, given that human learning takes place in interaction between an individual and his/her surroundings, the social approach enables an equilibrium to be achieved in favour of the learner that balances the capacity of the learner and the opportunities provided for learning in the least restrictive, most favourable context. ■

Measuring and evaluating for inclusive education

Measuring the progress of inclusion

The clamour for accountability, for human rights, for democracy and for greater beneficiary involvement over the past decade has made it inevitable, that the progress to and the success of inclusive education should be measured and broadcast for critical appraisal at institutional and system levels. So, the question arises, by means of what processes and procedures, what descriptors or indicators is it possible to assess the progress of systems and institutions towards inclusive education. For example, given the dilemma referred to above between group equity and individual participation, should all learners be expected or enabled to participate in the same single institution and curriculum, regardless of their needs and capacities, as a measure of the advance towards inclusive education. Should progress be seen as all learners in all countries and districts being forced to mainstream into their local learning centre, even if their needs cannot be met in the regular school system? If there are to be separate curricula, for example, given the phenomenon of the hierarchization of knowledge within educational institutions, how can an institution avoid some aspects of the curriculum taking on a more esteemed position than others?⁴⁰ And given that we cannot measure everything all the time, how do we decide what to measure and what not to measure and when?

One thing is certain, measurement and evaluation are important, not least because it is increasingly taken for granted that decision-makers at all levels need to know what is happening in schools and systems, if they are to effectively legitimate policies of inclusion. It might be said that they have a thirst for information and feedback, some of which is internationally stimulated. One reflection of this need for information is the establishment of the European Agency for Development in Special Needs Education, which is intended to collect and disseminate information and good practice. Another is the establishment of the Association for the Development of Education in Africa (ADEA), which has provided a high-level participatory forum for reflection and cross fertilization of ideas, policies and strategies. At an international level, such demands were manifest in the International Consultative Forum on Education for All, which was established to monitor and promote progress towards EFA, but which was 'disestablished' at the Dakar Conference.

Evaluation of inclusive education in a democratic context cannot sustain an exclusive focus on quantitative indicators, such as enrolment numbers on day one of the scholastic year

or the performance of students, assessed subjectively by teachers in an arbitrary and non-accountable way. Nor can it sustain an exclusive concentration on assessing students, to the exclusion of professional appraisal and institutional evaluation. Given that caveat, there are the first tender signs of the development of an evaluation culture, designed to address inclusive education, and some examples are given in this paper. But on the basis of what values should such evaluation be conducted?

While there may indeed be wide gaps between the declared and operative values in the debate about inclusive education, there might be expected to be a correspondence between the values espoused by a school and system of education, and the social structures, participation, procedures, curricula and assessment procedures manifest in the school, and its evaluation procedures. So evaluation of inclusive education would be expected to involve a review of the appropriateness and effectiveness of the institutional and instructional achievements of the learning centre and its teachers against the goals of inclusion within a democratic, human-rights-based environment. Any process of measurement would also be conducted according to those goals.

But it is easier to measure the progress of inclusion by using a narrow definition than a broad one. It is, for example, relatively straightforward to work out what proportion of learners with impairments in an area attend schools and whether they attend a mainstream or a special school. Even such statistics imply a regular and accurate gathering process and agreed definitions of impairment. It is, however, far more complicated to provide an assessment of improvements in the quality of the social and attitudinal – as well as the academic – participation of learners in learning centres.

Equally, assessing the professional attitudes, competence and effectiveness of teachers or of overall changes in the balance between pressures for inclusion and exclusion at all levels of an education system are not easy tasks, although there is certainly evidence of incipient changes in professional attitudes to evaluation.⁴¹ Nevertheless, the wish to gather simple statistics cannot be allowed to determine the approach to monitoring progress towards a more inclusive educational provision. In the following sections, this report looks at some examples of initiatives to assess, measure and evaluate inclusive education, and in some cases to link that process to institutional and professional development.

Indices for inclusion

In several countries, indices for inclusion have been developed to assess participation in schools and to assist schools in planning inclusive developments. Most of these indices have concentrated on learners with impairments, though they have carried the assumption that enabling schools to respond effectively to one aspect of diversity will help them to become good

places for all learners. Some groups of researchers have drawn on these earlier attempts, but with a change in emphasis so that the index is concerned with the inclusive development of the whole school, for staff as well as learners and their parents/carers. Such initiatives usually comprise a set of materials which support staff to enable them to share their existing knowledge, and to engage in a detailed examination of the exclusionary pressures and inclusionary possibilities in all aspects of their school/learning centre. The process usually requires them to draw on the views of learners, parents, community members and other stake-holders in education locally.

One attempt, which builds on such an approach and seeks to resolve the dilemmas, inherent in measuring progress towards inclusive education, is the 'Index for Inclusion', developed in the United Kingdom. Based on prior work in Australia and the United States, the Index, which is a set of materials to support schools in a process of inclusive school development, has three dimensions: a) creating inclusive cultures; b) producing inclusive policies; and, c) evolving inclusive practices (Booth et al., 2000). The Index aims to facilitate a participatory approach, which considers that, it is essential to examine the social and cultural purposes of evaluation, before considering the evaluation of schools and programs, the assessment of pupils and the professional appraisal of staff.

The Index starts from where the school is and seeks to develop the school through the process of using the Index. It is thus an instrument for the professional development of the staff and for school development, as well as for the measurement of progress towards inclusive provision of education. Its social and cultural purposes concern not only the overall goals but also the process of evaluation. It provides a certain rationale for its design and implementation, as well as for judgements concerning the respective balances of self-evaluation and external evaluation, on the one hand, and summative and formative evaluation, on the other, which are responsive to the criteria of democratic values and human rights.

■ **Box 13. Integration and evaluation in Romania**

The evaluation of the integration experience undergone by School No. 37 of Constanta yielded positive results. The major obstacle was the resistance of some parents and teachers and the fact that the opinions and views of the children mirrored the views and outlook of their elders. But through joint action, tenacity and the clever use of adequate strategies, these fears were proved ungrounded and the obstacles overcome. The children of Casa Speranta have been accepted and receive equal treatment. They like school, have a good, sometimes friendly relationship with their peers, and neither mothers nor teachers exhibit any trace of discrimination. The teaching staff exhibit a higher degree of tolerance with regard to childhood issues in general and a change of view regarding the evaluation of students. The headmistress and staff estimate that the future of inclusive education provided by their school will be good and they intend to continue and develop the experience.

Source: Extract taken from Romanian case study on inclusion, commissioned by UNESCO in 1999.

Measuring progress towards inclusion sometimes evokes painful professional and personal dilemmas. Safeguards for the professional and lay participants may be neglected and the necessary participatory dialogue with learners and parents or carers may be deficient. It is clearly indispensable that the views of teachers, parents or the community be sought and valued, if the instruments and procedures of the proposed measurement are not to be negatively received by teachers and 'beneficiaries' (Peterson and Comeaux, 1990). Yet the democratic and transparent process can be a double-edged sword. For instance, sometimes as has happened in the French system, the views of associations of the disabled and parents of disabled children may actually evoke resistance to integration (Ebersold, 1997). But this is not an argument against participation of those groups.

Notwithstanding such difficulties, a particular role in the process of measurement is sometimes undertaken by a general or special inspectorate at national or local levels or both. Such a system is neither inherently good nor inherently bad. It can either inhibit or facilitate improvement and the movement towards inclusion. But some inspection systems can actually militate against improvement, and particularly where the inspectors themselves are poorly trained or experienced, especially in the kind of education they are supposedly inspecting. They may be resistant to change because they feel insecure in their professional competence.

Sometimes, as indicated above, professional and lay rejection of the case for the evaluation of inclusion may arise because those being entrusted with its implementation act in such a way as to make important actors feel alienated from the process. Where inclusion is attempted at both locational and epistemological levels, for example in the National Curriculum in England, where diverse groups of children are offered the same broad curricular framework, there may be selective adaptation to the normal ways of working on the part of teachers, which can destroy the aim of curricular inclusion, depending on how it is implemented. The same may apply when it comes to the measurement of progress towards inclusion. The process of defining the kind of measurement strategies to be used, the criteria and the use to which the results will be applied, may also be neglectful of human sensitivity towards those involved. This may happen frequently in those systems where the inspectorate is seen more as a political reward or means of social ascent, where the role of the inspector is seen as being to inspect the registers, rather than as a task demanding teaching experience and thorough training. To be fully effective, inspection demands intensive training for the level and type of education to be inspected, ability to work in a participatory way with teachers and others, competence in teaching by example and the capacity to engage schools to participate fully in the process of inspection and to begin to self-evaluate.

But this is to expect a high level of skills, which are almost everywhere in short supply. Even in industrialized countries many schools still lack the capacity to reflect upon and eval-

uate their own professional practice and use the results for improvement and follow-up. Expertise, support and resources may be lacking. In some countries to overcome this disjuncture, the process of inspection and support for school improvement is unified (Sebba et al., 1996). Even so, standards are sometimes not seen to be manifestly just, applicable and sufficiently socially sensitive, reflecting the 'urgent' demands of quality assurance, and the inability of the centre to take full account of local culture and social and economic conditions (Sharpe, 1993). Evidently, decisions are sometimes taken on academic criteria far from the point of application on the basis of what kind of evaluative data are most susceptible to apprehension through currently dominant research techniques (Nowakowski, 1990).

A further difficulty is that sometimes the benefits of evaluation seem to accrue only to the evaluators, with those doing the work receiving only the 'flak' and the evaluators totally immune to any democratic accountability. Sometimes evaluation is seen as totally separate from the professional task of teaching and facilitating student learning. The data are often either miscommunicated or poorly communicated, giving the impression that the whole process is a bureaucratic waste of time and in the interests neither of the community, the pupils and the parents nor of the teacher. In addition, the results are frequently applied in a manner lacking in courtesy or the necessary confidentiality. All of these factors may lead to an alienation from the measurement and evaluation of inclusive education, resulting in a formalistic compliance, if any at all, or a determination to change or frustrate the rules of the game! Thus, policies of evaluation that do not adhere to democratic principles and the basic principles of a 'human-rights based' education can be socially and professionally counterproductive. But, where successful evaluation is carried out, it can reinforce the movement to inclusion.

Democratic evaluation and inclusion in education

Democratic schools, founded on a commitment to human rights and social justice, require democratic, accountable evaluation, and democratic evaluation means that assessment can no longer remain focused solely on the performance of students, judged in a subjective and often arbitrary way by professionals who are very often non-accountable for their judgements. Nor, however objective, can it address only the comparative testing of students, as though all spatial and temporal preconditions in all schools, communities and students were the same. It predicates participation and dialogue among partners and learners, responsive professionalism and the reversibility of professional judgements.

This point about the need for the involvement of learners is eloquently made in a report monitoring the progress of nations

towards implementation of the Convention on the Rights of the Child (1989): '... girls and boys with disabilities should be actively involved when the (national) report is elaborated. They should rank problems in order of importance and assess to what degree their voices have been heard in relation to the design of measures or whole programs' (Brolin, 1996, p. 25). Such evaluation will demand a range of techniques and instruments, including observation, questionnaires, interviews, tests, sociometry, diaries and, where resources are available, video and tape recordings. Some of these instruments can be considered both teaching and evaluation instruments. Such evaluation is clearly a complex and demanding endeavour, but one which can afford to grow in sophistication, as progress towards inclusion accelerates and expands.

One approach, which has sought to incorporate this wider more democratic approach to including learners and evaluating the results, is the series of initiatives based on a literacy approach, and called Regenerated Freirean Literacy through Empowering Community Techniques (REFLECT). Here the testing of learning outcomes is but one component, and it is accompanied by broader institutional evaluation and democratic accountability, including the assessment of the wider impact of the development and the sharing of results (See Box 14). Evidently, democratic evaluation has to be conducted with due regard for the human rights of the learner and the local community.

Safeguards of those rights require transparent criteria for professional judgement, professional accountability, and the acceptance of institutional and professional responsibility for learner progress. More, they exclude the possibility of such learners and learning centres becoming sources of statistical fodder for research reports and comparative studies, and they include the legitimate perceptions of the process on the part of both learners and teachers. In one project in the Philippines, for example,

■ **Box 14. The REFLECT approach to participatory rural appraisal**

In October, 1993 ACTIONAID began a two year action research to explore possible uses of PRA techniques within adult literacy programmes, leading to the development of the REFLECT approach. The three pilot projects were evaluated against control groups in the first six months of 1995. The results indicated that the REFLECT approach was both more effective at teaching people to read and write and at linking literacy to wider development. The evaluation also revealed significant spin-off in terms of empowerment and self realization. There was increased participation in community organizations, community level action to improve local services, impacts on household resource management, a positive impact on gender roles and relations, and on health awareness. One indirect result was observable in the Uganda case study, with a substantial increase in enrolment in schools of children whose parents participated in the REFLECT programme.

Source: D. Archer and S. Cottingham, The Experiences of Three REFLECT Pilot Projects in Uganda, Bangladesh, El Salvador, London, Department for International Development, 2000, pp. i-iii and 86-7.

the assessment of children with impairments, conjointly with parents, on initial entry to mainstream schools is seen as an important instrument to serve the needs of the children. Consent is required for the collection and revelation of information about individuals and groups. In other projects, children's perceptions of their own experiences in integrated settings are a central component of any full-profiled evaluation.⁴²

For this reason, and because of the way in which the evaluation of primary education in developing countries is sometimes conceptualized and reported by international agencies, as though it were solely concerned with the national assessment or testing of students,⁴³ it is important from the outset to define a holistic and in-built policy. Such a policy may comprehend various approaches to evaluation: institutional; programme or curriculum; personnel – also referred to as professional – appraisal; product evaluation; policy evaluation; and student assessment.⁴⁴ Such an approach is particularly important where, as in Finland, the system is highly decentralized, and thus evaluation has to provide the national-level authorities with a basis for policy-making, and resource allocation and adjustment, as well as to afford local and institutional authorities and professionals in schools with a basis for tactical change. But the Finnish experience indicates clearly that developing such a culture takes time and demands expertise, which is scarce where it exists at all, even in industrialized countries (Laukkanen, 1997).

Of course, institutional evaluation sets the context for other kinds of evaluation with its concern with goals, means and ends, but each style addresses different functions. Evaluation reviews the appropriateness and effectiveness of the institutional and instructional achievement of the overall goals of the school, its policies and curricula. It is incomplete without the review of staff performance and student attainment. It should also include any extra-curricular and out-of-school settings. Equally, however, it has to involve a formative and continuing evaluation of the very goals themselves. In this connection, a relatively neglected aspect of the evaluation of education in developing countries is the appraisal, in a balanced, just, systematic, open and developmental way, of the professional effectiveness of teachers.

Democratic evaluation does not exclude assessment of pupils' learning performance judged against cognitive, affective and behavioural indicators. The main aim of such assessment is to ensure that each student's attainment can be helpfully and clearly identified in the form of what the student knows, understands, can demonstrate and can do. These are perceived as the prerequisites for an iterative process of identifying strengths and weaknesses in such a way that the results can be used to facilitate and support the student's further learning. But intrinsic to the ideological shift to democratization, social justice and human rights, inherent in inclusive education, is a system impregnated with the same values to monitor and evaluate the faithfulness of teachers, schools, teacher-education

■ **Box 15. Parental involvement in assessment in the Silahis ng Kaunlaran Centre (Manila)**

All children with impairments who enter the Silahis Centre participate in the assessment process, conducted by a team with the involvement of parents. The main function of assessment, with which the parents are associated, is the diagnosis and placement of children with special needs in regular classrooms in order to offer them bespoke support and assistance, as necessary. Informal tests are administered and informal interviews conducted with parents. All children follow the mainstream curriculum and the inclusion practices are specific to the needs and conditions of the children. For example, hard of hearing pupils are provided supplemental special auditory training and speech development, but follow the same programme as other pupils. The same applies to blind children who receive class instruction from the regular teacher and supplemental teaching and assignments in Braille.

Source: Summarized from a country case study on the Philippines commissioned by UNESCO.

colleges and the whole of the system to those values. In other words, democratic evaluation and democratic assessment become integral to the professional practice of each educator and each school (Simons, 1987).

There might be considered to be two major aspects to this issue. On the one hand, there are the mechanisms for monitoring, assessment, appraisal and evaluation. On the other hand, there are the criteria or indicators through which school, programme and educator performance, and the curriculum may be monitored and evaluated, and through which the cognitive, affective and behavioural learning of students may be assessed, judged and incorporated into changes in teaching/ learning strategies. Each of these aspects may be best served by a formative or summative approach that can inform the background ideological values, and professional theories and beliefs, which in turn inform the school's evaluation of its own success and the teachers' professional practice. But clearly such an approach needs to be built in right from the planning stage and to permit of a variety of approaches and instruments.⁴⁵ That process must include the cost implications of the evaluation strategy, which have to be estimated and allowed for in the institutional budget.

Given that such evaluation is integral and resourced from the start, it need not be inordinately expensive and it can be of fundamental assistance to both the school and teachers in steering teaching and the other services offered by the learning centre ever more closely to the overall goals set by the institutional and systemic commitment to democratization, as well as the framework policies and legislation. Provided that evaluation is not considered to be something separate and only for the professionals, teachers' and pupils' values, attitudes and knowledge can be gradually more aligned with the democratized institutional ethos, securing greater congruence of theories and practice, values and behaviour, policies and actions. In other words, evaluation is seen not just as a control mechanism, but also as a useful instrument for social and cultural change to ensure that the shift

in the base values of the institution is gradually injected into curricula, teaching/learning methods, structure, policy and procedures, including communication and relationships within the institution and with the surrounding community.

At this point, there is in fact a confluence of the interests of economic efficiency and social justice in the improvement and enlargement of quality education in developing countries. Schools and teachers, together with their communities, even in rural and very poor areas, increasingly wish to be involved and to reflect on the fundamental questions about the congruence of the school's overall mission, goals and objectives with their perceived needs and those of the children, within the context of the principles of human rights, equal justice, mutuality and social responsibilities. They are also willing to allocate some of their meagre resources, even if only perhaps in the form of time or labour, to improve the educational provision available for the children. In some cases, they are jointly appraising how the values of the centre may influence their school's structure and activities, its curricula, monitoring and student assessment methods, reward systems and procedures, its structure, staffing, communications, curricula and assessment policies, including, non-academic achievements. Such activity alone must have an impact on how well internalized those values are by various groups in the school community. In itself, the process is an education for the improvement of all concerned.

It is always useful to the process of evaluation to have pre-existing reviews to inform the process of needs assessment and evaluation. But, given that evaluation is a fairly recent development, by and large schools do not have such a baseline. They have to start de novo. Where they do have the good fortune to be able to draw on previous evaluations, however partial, of the functioning of the school – reports of inspectors and visitors, examination results, comments from experts from other agencies and NGOs or feedback from pupils or parents – this will certainly assist their endeavours to improve their own school (Caulley, 1987). Further, more and more donors to developing countries are supporting community participation in education and demanding greater

■ **Box 16. Participatory monitoring: an example from South Africa**

Monitoring is an essential element of the upholding of human rights generally. It can be used as a corrective tool against the violated rights of disabled persons. It can also be used to measure trends and patterns of discrimination on the grounds of disability, both at an individual and systemic level. For it to be effective, it requires: gathering, co-ordination and collation of findings; accessibility of findings to civil society on an accessible and understandable basis; inclusion of people with disabilities; all stakeholder should be partners in the process; reporting which is simple and sensitive to persons; based on close links established by the monitoring agency with people at the community level.

Source: South African Disabled Childrens Action Group, *Report of International Seminar*, p. 48, Cape Town, DIGAC, 1998.

accountability of the central organs of government, as well as including explicit indicators in their projects and for their financial assistance. Thus, professionals in those countries are increasingly trying to judge their own performance against explicit indicators to ascertain that they, the system and the learning centre are achieving the goals set, or alternatively, why they are failing to achieve them. In the movement to introduce sector-wide approaches, for example, questions are increasingly posed as to whether there are adequate tracing mechanisms for disbursement of the funding allocated to the sector by the donor agencies. Are the human, physical and fiscal resources being correctly implemented to facilitate the achievement of the government's policy objectives? Are the structures and procedures dysfunctional in any way? How faithful are they to the values and goals of the system and the school, and their declared missions. If they are for inclusive policies, are previously excluded learners, such as those with impairments, now being included?

Looking then to the future and the necessary improvements, professionals even in developing countries will increasingly have a battery of evidence, on the basis of which they may reflect on what changes need to be made to better achieve the school's mission, (Middle States Association . . . , 1984, p. 4) what policies and procedures are required to keep all staff up-to-date with professional developments and social and economic change, and how, relying on professional mutuality, they can help each other to improve. Empirical attempts are being made to identify what the characteristic features of effective schools might be, given that the profile and the pathways will vary according to the cultural and social context (Rouse and Florian, 1996). Such techniques are being used more and more in developing countries in sector and other work by major agencies such as the World Bank (Heneveld, 1994).

In sum, inclusive education demands inclusive measurement, monitoring and evaluation. Testing of students alone will not pass muster to measure the progress of inclusive education. In response to democratic values, which call for greater professional accountability and wider participation, a broader inclusive evaluation, responsive to the values of human rights, social justice and mutuality is called for and is very gradually emerging here and there. If, however, in the movement to universalize primary education to include all currently excluded groups, the incipient movement towards the democratization of education in developing countries is not to be buried in bureaucratic formalism, which can serve nothing but the perpetuation of existing social and cultural systems, holistic policies and practices of systemic, institutional, professional and curricular evaluation, pupil assessment and teacher appraisal are essential. But this does not presuppose a monolithic approach that would be the same everywhere, or unchanged and unchallenged paradigms. Far from it, for there are different ways and different means of adopting such a strategy, depending on the social and cultural context and traditions of the country, the system and the institution. The enormous, demanding and complex task has only begun. ■

Developing inclusive education policies

Power and influence in policy development

Many governments, organizations and individuals have been influenced by the strong stance of international organizations on inclusive education, particularly the World Declaration on Education for All (Jomtien) and Dakar Framework for Action and the Salamanca Statement. The latter argued that 'the development of inclusive schools as the most effective means for achieving education for all must be recognized as a key government policy and accorded a privileged place on the nation's development agenda'. The importance of clear international, national and institutional policies is now widely recognized, and in some cases it is absolutely essential to counter wider societal pressures to exclude. Yet in many cases the implications of this imperative for society and education are not made explicit. Still less are the differing functions of the different levels, for example national policy for local practice, spelled out in accessible and operational form. Implementation, therefore, remains patchy and uncoordinated, even where there may be legislation and excellent instruments for its implementation. In some cases, those who are impaired seem to have to fight the same battles over and over again at different levels and different times to be consulted and to become involved.⁴⁶ Moreover, sometimes the essential mechanisms to enforce human and civic rights to participation by the excluded are just not in place. Legislation is absent⁴⁷ and the strategy for inclusion thus remains vulnerable to political whim.

For this reason, it is increasingly recognized that policy development has to operate at all levels of the system. Developments within communities have to be supported by local and national policies and legislation. It is appreciated that national policies have to engage with the realities of life within local communities and ensure that strategies are in place to move local practice forward. More and more, there is acceptance that, at each level, there has to be an appropriate balance of lay and professional participation. There is increasing recognition too of the harmony that is required among non-governmental organizations (NGOs), and between them and national and local government administrations, the local community and religious organizations in the new 'coalitions for change'. For instance, in all the great religions, important contributions are made to general education, not least in caring for those with impairments. But the significant role of religious organizations in providing education in many countries needs also to be better understood and considered by international agencies. The role of these religious organizations in the move towards inclusive education needs to be encouraged.

■ **Box 17. Parental involvement in schooling decisions in Ireland**

'Parents should be actively involved with the professionals in making a recommendation concerning their child's initial school placement. The implications of each alternative placement should be made plain to them in order to assist them in making an informed decision.'

Source: Ireland. Ministry of Education, Report of the Special Education Review Committee. Dublin, The Stationery Office, 1993, p. 33.

The balance between professional and lay participation in policy- and decision-making is also still sometimes inadequate. Parents sometimes feel and are excluded from processes and decisions about provision, even about provision for their own children at a crucial stage in their development. Professionals may play a disproportionately large role in shaping provision. The corollary is a relative absence of clearly articulated policies, which have been formulated and implemented with the potent involvement of parents, representatives and voluntary organizations.⁴⁸ This absence can be a very important functional gap in the provision of inclusive education, not least because it detracts from the human rights of parents concerning their children. Parents at the very least have a right to be involved when any diagnosis or decision is being made about their children. But, to make that involvement meaningful, they need the requisite information, details of the options and alternatives, and explanation of technicalities, which will enable them to take informed decisions. Inevitably, the question of participation raises the issue of whether there is the political will, and whether the mechanisms and processes are in place for participatory change by teachers, parents and pupils to more closely appraise the goals of institutions and systems for learners and thus to achieve their common mission.

Lack of such built-in mechanisms and processes can inhibit the process of reflection on how far the educational obligations inherent within the goals of inclusive education are appropriate to the school's location, facilities, and human and material resources, to the student clientele, their ages and stages of development, and to the identification of policies and practice in addressing issues concerned with the environment of the school and the community. Certainly, there is reported to be increasing pressure in many European countries for greater parental choice and involvement, not least in the context of the effects of growing pressure for increased academic standards on vulnerable pupils (European Agency . . . , 1998, p. 184). In general terms, arrangements need to include the participation of vulnerable pupils and important opportunities for pupils of all ages to take on appropriate responsibilities in the school and community, and for their own learning and that of other pupils.⁴⁹ In developing countries too the involvement of parents and community members is increasingly seen as indispensable (O'Toole, 1994).

But there are dangers. In many countries, as in the United Kingdom for example, there is a large private sector catering largely for the elite of more privileged and wealthy communities, with the state providing a basic education in the poorer communities and other areas for the population at large. This latter education is generally seen as having a lower value than 'independent' education, and this is a major exclusionary pressure, erecting social barriers that are extremely difficult to overcome and an ethos which it is almost impossible to combat. Such traditions to safeguard the 'cultural and social' reproduction of elites by means of educational segregation, exclusion and privilege work against those with impairments and others who are marginalized in society.⁵⁰ Such divisions may also be deeply culturally entrenched in a system of folkloric but powerfully exclusionary snobbery that is normally not open to challenge. Again this disadvantages the impaired and other vulnerable groups. According to one group of educators: 'the idea of exclusive education is more entrenched than inclusive education' in their region. Educational exclusion is revealed as part of a political process which impinges on the distribution of wealth and opportunity in society. The social – and probably economic – cost of such exclusion is likely to be very high. But, exclusion is also increasingly seen for what it is; a denial of human rights (Bessis, 1995).

An emphasis on rights to inclusion in the education of learners with impairments has been pressed forward by disabled people's organizations and by organizations of parents of disabled children sometimes in alliance with each other. This is similar to the ways in which women's organizations and ethnic organizations have championed the rights to equal treatment of girls and boys, and all ethnic groups. In some countries, for instance Canada, national and provincial mechanisms have been put in place to challenge discrimination on all these grounds.⁵¹ For example, where the proportion of

■ **Box 18. Inclusion and participation: a project in Lesotho**

The integrated education programme in Lesotho is a national programme. Over one month in 1995, a small pilot project was undertaken with a focus on two out of ten pilot schools in the programme. A variety of techniques was used, including observation, interviews, story-telling, diagrams and profiles. Teachers, parents and key community persons were involved and all findings were shared. Factors that had contributed to a positive approach to integration were identified as follows: a) a high level of participation from the programme's inception; b) strong local leadership and support from key people; c) full parental involvement in the school; d) a very strong community spirit; and e) teachers motivated by a strong sense of community responsibility.

Source: Summarized from a report in S. Stubbs, 'Can Poverty Facilitate Inclusion?', EENET (Enabling Education Network), 1999.

learners with impairments attending a local school has increased, frequently this has sometimes been as a result of a struggle between parents and professionals. The assertion of rights by parents of learners with impairments and disabled people, drawing on the influence of international organizations, has had a major effect on policy development. Such instruments as the Standard Rules on the Equalization of Opportunities for Persons with Disabilities, the Convention on the Rights of the Child and the Salamanca Statement and Framework for Action on Special Needs Education have had a major impact on these developments.

It follows from what has been said that the institutional recognition of the human rights of all, equal social justice, and a commitment to reciprocity and democratic practice will have major implications for the development and implementation of inclusive education. That commitment will make certain demands of any mechanisms for participation and any indicators or criteria which are generated, whether about the institution, its goals and programmes, teachers' professional performance or the scholastic expectations, achievement and behaviour of students. For example, while pupils with physical disabilities may have problems of mobility and muscular control and coordination, as emphasized previously in this report, there is no direct correlation between physical disability and intellectual ability to cope with the normal school curriculum. Similarly, many children with hearing impairments can make good progress in ordinary schools without special arrangements.⁵² Those often described as visually impaired are, in fact, frequently partially sighted and can function with the assistance of appropriate aids in normal classrooms, provided the class teacher is aware of and responsive to their special needs.⁵³ On the other hand, pupils with no physical disability, for example those with emotional and behavioural difficulties, a 'category' of children which is increasing in some industrialized countries, may require special educational responses if they are to cope adequately with the normal curriculum.

Professional decisions and actions about learners must be respective of the institutional values and goals, responsive to criteria of democratic pluralism, human rights and social justice demand rational judgements, grounded in appropriate professional knowledge and expressive of respect for persons, due process and reciprocity among all members of the school, as well as with the community. Inherent within those values is the principle of the reversibility of professional judgements and decisions which will enable professional decisions to be the object of principled questioning. This process will necessitate techniques of professional self-appraisal, which will enable teachers to monitor and improve their decision-making skills as well as their classroom behaviour, knowledge and performance.⁵⁴ It is at this point that the interests of human justice and inclusion for all, increased efficiency, improved quality and teacher appraisal according to democratic values coincide.

Developing national policy

At the international level, there is already a well-known and extensive legislative and instrumental protection of the human rights of people with disabilities, through the principles of human rights, equality and non-discrimination.⁵⁵ In addition and over the past two decades a veritable plethora of international initiatives has attempted to afford children with impairments greater inclusion, through such instruments and initiatives for example as the recommendations for implementing the United Nations World Program of Action Concerning Disabled Persons that guided the United Nations Decade of Disabled Persons (1983-1992), the Jomtien Declaration and Framework⁵⁶ and the 1994 Salamanca World Conference on Special Educational Needs. The latter issued a Framework for Action and Declaration on Principles, Policy and Practice in Special Needs Education, reaffirming the basic right of all children to education, and identified regular schools as the most educationally efficient and cost-effective means of achieving education for all, including those with special educational needs. Thus the context was one in which the main aim was to include all children, especially those with special educational needs owing to physical or intellectual disability. New regional and international associations, agencies and organizations have also sprung up to facilitate exchange of information and experience and partnership.

These international efforts form a context and, in some cases, guidelines for what is without doubt one of the most important facilitators of national policy development to combat the exclusion of those with impairments and other excluded learners, namely a legislative framework. In this respect, much progress has been made in countries of the North since the formative period of the early 1970s. In the United States, for example, the Americans with Disabilities Act of 1990 and the Individuals with Disabilities Act of 1997 represent wide-ranging law which prohibits discrimination in every aspect of human life and requires the elimination of all barriers, thus guaranteeing all students with disabilities free appropriate public education in the 'least restrictive environment'. Furthermore, the emphasis in the 1997 text is on high expectations, success and their maximum access to the general education curriculum. While such legislation might be described as 'complaints-driven', the very existence of the legislative framework has an impact and voluntary compliance seems to be achieved in the vast majority of cases in the United States.

But of course, such legislation is likely to be ineffective without the essential enforcement and monitoring mechanisms for implementation and accountability. The American Act, therefore requires Federal Departments to work together to provide necessary technical assistance, for example to 'people with disabilities', through training, public awareness, communications and the provision of information. Similarly, in Canada, the Canadian Human Rights Act of 1977 nowhere defines 'disability', so that definition of the term had to be made on a case-

by-case basis. But subsequent amendments, particularly in 1983, case-law and the passage of the Canadian Charter of Rights and Freedoms in 1982, have largely corrected this early omission. Moreover, the mechanisms for monitoring and rectification have been established at both national and provincial levels and counterpart acts or codes passed at provincial levels (Canada. Minister of Public . . . , 1998). The whole-hearted commitment to multiculturalism and human rights in Canada provides a useful model of policy and process at both national and provincial levels for the consideration of others wishing to pursue policies to accommodate diversity.

There is a multitude of different ways of proceeding, all of which would facilitate policies of inclusive education. Legislation specifying national frameworks, curricula and assessment systems, for example, seeks to take account of the range of attainments of similar-age learners, if they are to be used to support inclusive practice. Some countries have enacted laws giving access to the education system to learners irrespective of the severity of an impairment (educability laws) and some have also passed legislation indicating a presumption that this education should take place in a regular rather than a special school. Some make a distinction between severe and less severe impairment with the presumption of special school education in the first case. In only a few cases does the law come close to giving a right to an education within the local community school, where that is practicable. But the movement almost everywhere is in general to mainstream the maximum possible proportion of learners, consistent with their learning needs.

For example, even in those many countries where separate provision is still maintained within legislation, such as New Zealand, the movement to inclusive education is strong and irreversible. For example, while the Education Act of 1989 may not be conclusive in its provision of the right of all to access in the regular system, the Human Rights Act of 1994 outlaws discrimination on the basis of disability. The Special Education Guidelines of 1995 also emphasize the right of students with disabilities to access to the same educational settings as other learners (Ballard, 1996). Increasingly too, even where there is separate provision, curricular integration, sometimes within a national curriculum, is the order of the day. For example, in Ireland, where the aim is the maximum inclusion in the regular school system but specialist facilities are maintained for those with particularly severe impairments, curricular integration continues, although it might be argued that integration is only a first step along the path to inclusion on a basis of equality.

Further, even in many countries, where the division between special and general education policy derives from a predominant medical model, which can cloud the development of an overall social inclusion policy, exclusive reliance on this medical model is gradually being eroded or abolished. In China, for instance, government intervention through legislation and regulation has redefined special education as an integral part of compulsory education. This step has been accompanied by

measures to make the system more inclusive, with consequent reported increases in enrolment (Chen, 1996).

In some cases, the movement towards a more inclusionary approach has been developed on the basis of an explicit partnership, where the state recognizes that it cannot do everything itself and that it needs the participation of parents and the community. Such an approach explicitly recognizes the continuing and crucial role of the State, but emphasizes the need for sharing the task with the local community, beneficiaries and parents. With precursor development in the North, for reasons of equity and efficiency of resource utilization, such models have tended to evolve in countries of the South. One example is given from Madagascar in Box 19.

■ **Box 19. Madagascar: decentralization and the continuing role of the state**

The state accepts that it has a primary role in the reduction of inequality, the definition of standards and the development of a framework of policies and measures that support the major objectives of the country. Within this context, the sectoral policy for primary education in Madagascar identifies three major tasks: (a) the urgency of improving access to primary school for all children; (b) the need to improve the quality of learning, teaching and training at all levels; and (c) the need to mobilize a partnership with parents and communities, beneficiaries and the private sector.

The major instrument that the Government of Madagascar chose for the achievement of these objectives was a community- and school-based programme supported by two World Bank projects. The goal was to involve the community in the central aim of basic education, namely to allow every child to acquire the basic learning tools of reading, writing, speaking, understanding, counting, calculating and integrating into society, and developing the ability to continue to learn. The realization of this goal implied an important and sustained effort at changing knowledge, attitudes and behaviour, and even the way in which the educational process and the involvement of the various partners were conceived.

Source: Slightly adapted from D. Viens and J. Lynch, 'Madagascar: A Developmental Approach to Community-based School Management', *Findings*, 2001, p. 175.

In Europe, regardless of whether they have mono-track, dual track or multi-track systems of education, many countries now have unitary legislative frameworks which embrace all pupils (European Agency for Development . . . , 1998) and some are proceeding to establish a national commission to oversee disability rights. Inclusion policy is no longer seen as part of special needs education policy, preventing an examination of the exclusionary pressures within the system as a whole and undermining the development of inclusion. Such a unified approach does not prevent, especially in countries of the North, inclusion policies that are sub-divided, for example, into policies concerned with the inclusion of learners who have sensory or physical impairments or are categorized as having special educational needs, and policies about reducing social disadvantage

called 'social inclusion' policies. Within a policy of maximum inclusion, for instance, there is still widespread recognition of a need for expensive special provision for cases of severe disability and an increased willingness to bear the cost to afford those learners their basic human rights. But there is still a lot to be learned about the best educational settings at particular stages of their development for all children suffering impairments or social and emotional disadvantage. In the case of some impairments, such as autism, one of the most severe development disorders of childhood and regarding which professional knowledge is still somewhat unclear, no single type of educational provision is likely to meet the needs of all children. The regular school is seen as appropriate at some stages and for some learners, while more specialized settings will be needed in other cases and at other stages.

None of the above examples obscure the fact that there is still an on-going and vigorous debate between the two poles of inclusive education, namely those who want a single inclusive system for all learners, if possible in the locality, and those who wish to maintain a separate special needs education system for a proportion of learners, where it is essential in their individual interests. For example, in a country such as India, with a well-established system of some 3,000 special schools and a vigorous movement at the same time to 'integration' with over 17,000 schools adopting an 'integrative' approach, but with a large proportion of the school-age population still excluded from education of any kind, what should be the priority? (India. Ministry of . . ., 2000, pp. 8–9) To press ahead to school the maximum number as quickly as possible? Or to try to achieve 100 per cent in a selection of districts? Of course the policy options are never as stark as this.

But in a number of countries the priority is clear. In Uganda, the girl child and the disabled are the priority. But, what of other countries? All developing countries are faced with the challenge of addressing diversity amongst the learner population somewhere along the continuum that we might typify as being from full integration to full separation. Given the youth of the concept of inclusive education, it is not surprising that to date no system has completely escaped or made a complete shift away from segregated thinking about learners with impairments. Indeed, even in contexts where education is provided in the mainstream, this has often produced segregating practices inside regular learning centres, both locational and curricular. But, the debate is becoming more differentiated in terms of both locational and curricular inclusion, and more sophisticated in terms of the institutional and pedagogical practicalities.

But a unitary legislative and policy framework can also have its downside for inclusive education. There are fears that former close ties with parents and linkages to other professionals at local level in support of disabled learners in the special education system may not exist in the mainstream school. Special arrangements have to be made, including additional responsi-

bilities for some teachers, which may not be popular and for which they have not received appropriate training. Even more seriously, signs of concern that could lead to a movement in the opposing direction, namely away from inclusive education, are to be seen. For example, some countries, such as the United Kingdom, have adopted national policies that involve a competitive approach to raising attainment levels in learning centres, with league tables and all the other characteristics of an economic output model. More recently in England, a return to a more diversified institutional provision with a return, at least in part, to selection by ability, has been heralded. There are, of course, arguments for and against such approaches. It can be argued that they encourage higher standards and provide a basis for informed parental choice, where choice exists. They can encourage schools to compete against each other for positions on league tables of educational attainments as if in an economic market. It is certain, however, that they make the movement to inclusion more difficult and present particular difficulties and challenges for disabled learners and other vulnerable learners.

Parents may compete, for example, to get their children into the most socially desired learning centres and the most successful schools, and to seek to choose the parents and co-learners they prefer for their children. But such policies put an additional pressure on learners in economically poor areas because they lead to a concentration of the most vulnerable learners in particular learning centres which, as general attainment levels fall, become less popular, and as numbers fall less viable. In those cases within such a system, the local school faces stigmatization and eventually closure. Such approaches can, thus, make an uneven playing field even more uneven. On the other hand, an inclusive approach to raising standards is about providing the support necessary to enable schools to encourage the highest achievements of all learners in their neighbourhood, district or town.

Similarly, other policies with the avowed aim to democratize and improve schooling, for example, the movement to improve parental choice in countries of the North, are not always an undivided blessing. Although the results appear to be inherently positive,⁵⁷ unrestricted choice may have adverse results in both developed and developing countries, not least for those currently excluded or needing special provision that can only be economically and appropriately provided on a concentrated basis. Econometric research in the United States may seem to indicate that such parental choice improves performance, measured by test scores and students' future earnings. It may also reduce costs, whilst having little effect on the rich/poor divide. But such choice does not exist for the vast majority of rural parents in developing countries and for parents whose children continue to need special provision, available perhaps in only one centre in the country. Moreover, such an approach to parental choice may also militate against the idea inherent in inclusive education that all children should attend their community school. On this area, the jury is still out.

On the other hand, in some systems attempting to become responsive to learner diversity, there are attempts to introduce more flexible and responsive national curricular and assessment policies linked to individual progression. The practice of grade repetitions arising from applying single grades for all students at particular ages is being questioned, along with forms of tracking or streaming. These practices are often based on the assumption that teaching groups need to be as homogeneous as possible. The corollary is the one-fit teaching approach. In contrast to this approach, inclusion involves valuing diversity in learning groups and the adaptation of teaching approaches to support them.

Nonetheless, inappropriate curricula taught by teachers poorly prepared to teach the diversity of learners in front of them, with poor textbooks and teaching materials, often borrowed from other cultures, remain a widespread phenomenon. They are major causes of student absenteeism, repetition, failure and drop-out. Furthermore, for many rural learners in Africa (90 per cent of learners in many cases), not only the pedagogy but also the language of instruction contribute to exclusion. Sometimes imposed or induced with promises of donor support or as a consequence of donor pressure, the language of instruction is inaccessible and therefore a major exclusionary factor. Policy in these cases has not been directed at creating conditions for active, successful learning by all learners within all learning centres, taking account of the cultural and social context, but at assuaging other concerns.

■ **Box 20. Flexible and adaptive curriculum in a Lisbon school**

This school, built in 1995, is located in a highly populated area of Lisbon. It has 600 pupils across three cycles of basic education. Many students at the school receive little or no support from parents at home and do not have favourable circumstances for their homework. The school does not reject any student from its area and includes several students with severe disabilities. Those having severe intellectual difficulties have educational programmes adapted for their specific needs. They are all enrolled in regular classes and according to their needs they attend full- or part-time the different classes. They have the services of a support teacher in specific functional activities in the school building or in the community. With the support of a local NGO, some of the older pupils spend some time during the week in work placement for training in social and work skills.

The issue of resources is clearly a major determinant of progress to inclusive education. In some countries the special school system has been the only means for distributing targeted resources for learners with impairments, often in the form of supplementary or weighted capitation allowances. In some cases, this targeting has been lost as a consequence of mainstreaming, although in others a system of weighted supplementary capitation has been instituted for learners in the reg-

ular school who have additional needs. In this respect, policies for inclusive funding sometimes involve a combination of devolving funds to learning centres to respond to diversity generally, but at the same time providing funds on an area basis for equipment and specialist support and advice for a small number of learners with very severe impairments, sometimes in separate units or centres. The important principle is that central and local education authorities do not use mainstreaming as an instrument for arbitrarily reducing costs. Finally, whatever system is used, it has to be monitored to ensure that funds are directed to reducing the particular barriers to learning and participation in the neighbourhood, and that they are equitably distributed. But given efficient tracing mechanisms, funding can be an efficacious way of providing for diversity and educational responsiveness within the unitary framework, necessary for inclusive education to succeed in achieving EFA.

Interlearning among countries

Comparative analyses of different special education systems can be a useful stimulant to discussion and dialogue, and may even form a part of policy option formulation. But caution has to be exercised in applying the solutions to educational problems that are adopted in one country to an entirely different political, economic and cultural context.⁵⁸ The example of parental choice given above illustrates that the issues are sometimes so fundamentally different, not least in industrialized and developing countries, in urban and rural areas, in poorer and less poor regions and localities as to defy generalization. Paradigms developed in one country and through one language as a structure for thought may not be appropriate to another with a different culture and traditions. For example, special needs education arose in countries of the North in the context of universal, free education. Where countries of the South adopt the special school model as the way to include learners with impairments in the education system, in the absence of universal education, and without a widespread belief that such learners have a right to education, only a minority of learners with impairments can often receive an education and these generally belong to privileged, usually urban sections of society.

Even in the North, however, there are fundamental differences, between systems, such as that in Germany, which maintain a high degree of separate provision, (Ellger-Rutlgardt, 1995) with little sign of development towards integration, and the systems in the Scandinavian countries, which show marked signs of maximum inclusion, with many countries in between. Yet countries of the North and the South do have much to learn from each other. Many educators in countries of the North suggest that inclusion cannot move forward because of the limitation of resources in their countries. Nevertheless, as we have seen already, there are examples of creative inclusive practices within countries of the South, in the context of severely

limited resources. Such examples reveal the importance of shared inclusive cultures and values in enabling progress. So there is much that countries can learn from each other and much help which they can afford to their near neighbours.

Regional organizations have increasingly grown up to address the need for mutual learning in areas such as children with special needs. Some of these regional self-help groupings have had the benefit of being linked with such international organizations as UNESCO. The European Association for the Development of Special Education is such an organization, which sets its sights on strengthening cooperation, communication and coordination among member countries and professionals in the field, on improving the training of educational personnel, on working with those having special needs and on promoting improved life and learning conditions for the disabled. One example of its achievements was the leadership that it showed in the establishment in 1982 of HELIOS (Handicapped People in the European Community Living Independently in an Open Society) which sought to stimulate cooperation among local services and non-governmental organizations, to develop a network of rehabilitation centres and models of local model activities.

Co-operation among the international community is also increasingly taking on the characteristics of a global community with shared interests and responsibilities among nations.⁵⁹ Acknowledgement has already been made of the work of the International Consultative Forum and the European Agency for Development in Special Needs Education. The series of regional seminars, organized by UNESCO as a prelude to the Salamanca Conference, was undoubtedly a path-breaker in establishing networks amongst nations which have continued long after the end of the Conference in 1994. Similarly, both Jomtien and Dakar had precursor regional meetings to herald and provide the foundations for the major conferences, which again prepared the groundwork as well as establishing networks of interchange and mutual assistance which still continue.

Internationalism is also exemplified in the exchange of technological and material support for social development programmes including assistance to children with special educational needs in developing countries, with a mutually advantageous two-way movement. The Scandinavian countries have contributed significantly to Asian national efforts to train personnel, and have provided initial seed funding and support for the establishment of initial services for children with impairments in many developing countries. Examples of this approach would include Danish assistance to services development in Nepal, Norwegian Aid to teacher-training facilities in Bangladesh and Swedish Aid to teacher-training facilities in Sri Lanka. A number of countries, for example Norway through its LINS Centre in Oslo, have also been active in establishing international resource centres and stimulating exchange of information on and for basic education.

Similarly, intra-regional cooperation is also growing. The Japanese National Institute for Special Education has, for example, been very influential in developments in the region and bilaterally. The Asia and Pacific Decade of Disabled Persons (1993–2002) has among its aims an increase in sharing within the region. The Asia Federation for the Mentally Retarded (AFMR) has stimulated research and innovative practices throughout the region since the late 1970s. The Federation holds triennial conferences organized in turn by each of its member nations. International non-governmental organizations similarly have played a substantial role in instigating services with national counterparts. Helen Keller International (HKI) supports the education and rehabilitation of visually impaired children and adults. Its Asia Pacific regional office in Bangkok provides regional training workshops, especially for working with children with blindness and additional impairments. It has a field office in nearly all the developing Asian nations. Save the Children Fund in the UK has also developed special needs educational programs in many nations as well as training programs and community development work. In Europe, sometimes taking advantage of European Union programmes, there are examples of innovatory programmes and interchanges involving several countries in the field of training personnel for special educational needs.⁶⁰

People with impairments are playing an increasingly powerful role at all levels: community, national and international. The international non-governmental organization Disabled People's International (DPI) was formed in 1981 as the international advocacy group to empower individuals with disabilities. They now have affiliate organizations of disabled people in well over 100 nations. DPI has consultative status with three United Nations agencies as well as being a leading member of the International Council on Disability. It played an active role in formulating the United Nations' World Program of Action Concerning Disabled Persons. A large part of DPI's activities focus on the concerns of disabled women, disabled refugees and disabled people in rural areas with little access to the required services that could lead to independence and dignity. The organizations Action on Disability and Development (ADD), with projects in 13 countries of Asia and Africa, has an overall aim of helping disabled people to claim their human rights, equal opportunities and full inclusion in society. Similarly Disability Awareness in Action, the international disability and human rights network and Healthlink Worldwide, which publishes Community-Based Rehabilitation News and provides technical assistance and training, are active in advocating and securing the rights of the disabled.⁶¹

Many world organizations, multilateral and bilateral, from Save the Children to UNICEF, and including such major donors as the World Bank, have begun to build on the work on effective schools, combining it with the results of work and research from the developing world to identify policies, approaches and inputs which can optimize learning opportunities for all, based on a participatory assessment of local needs. This work is

strongly focused on poverty alleviation and human resource development as a major instrument for national development. In all of these developments there is a common strand, namely to include all children within quality cost-effective delivery of education, especially for those with impairments who are currently excluded and have an explicit human right to such provision. There is no reason why a similar approach should not be adopted towards education for cultural, physical and psychological diversity (Lockheed and Verspoor, 1990). ■

Developing inclusive learning centres

Communities participating in inclusive education

The movement to inclusive education has deep implications for the involvement of both beneficiaries and communities in decisions that affect them. A major test of the progress of inclusive education is not solely how responsive ministries and governments are to the demands of interested parties (although that is clearly a *sine qua non*) but how far those interested parties have representation, direct or vicarious, in policy-making and decision-making, and feel that their influence over decisions that affect them is potent and meaningful. It is evident that where participation is offered in a reserved form or merely as a placebo, it is clearly more likely to alienate than to engage. Such a restricted participation might be necessary if the role of communities in democratic society were to act as the passive recipients of missives from on high and the role of school were to be limited exclusively to supporting existing systems and reproducing present inequalities. But in inclusive education that cannot be the case, for inclusive education mandates change across the board in education, not least in its values. Given its foundation of human rights, it is apparent that a first test of any inclusive education system is the sensitivity of its operation to those for whom the service is intended: the learners. In this respect, discussion of participation in international discourse increasingly embraces the learners themselves, directly where possible, and indirectly through a proxy in the case of those who may be unable to represent themselves because of the extreme severity of their impairment.

In a survey undertaken by UNESCO in the mid-1990s, it was found that some countries gave parents and carers a central role in the assessment and decision-making procedures. In Norway, the parents' written assent was needed before any intervention was made. In other countries, parents were included in the drawing up of individual education programmes. In Poland and Italy, parents could veto their child being sent to a special school. In Australia, parental choice was central to a policy which required the state to support and facilitate that choice. However, most countries did not give parents an absolute right to choose a particular form of educational provision for their child.

A number of other countries have also moved along the path of granting parents their rightful place in the education of their children. For example, under the 1995 Act in India, parents of those with an impairment have achieved a right to participate in decision-making about their children and the

implementation of programmes. A Commissioner for the Disabled has also been appointed and State level mechanisms established to consider grievances (India, Ministry of . . . , 2000, p. 19 et seq.). Thus, the situation with regard to parental participation is patchy at the moment. But in a somewhat halting way internationally, progress is being made towards a more fair and equal system for the involvement of those with a right to a voice and influence over educational decisions, namely the beneficiaries and their families (UNESCO, 1995, pp. 22–23).

■ **Box 21. Learner representative councils in South Africa**

Representative councils of learners must be developed at all centres of learning. In line with the provisions of the South Africa Schools Act (1996), all schools must provide for learner councils and learner representation on school governing bodies. Should a school wish to seek exemption from these provisions, a special application must be made to the provincial ministry. Such an application will only be considered if it has the support of both learners and parents in the school. The option of learners with severe cognitive disabilities being represented through advocates should be accommodated.

Source: South African Department of Education, National Commission on Special Needs in Education and Training, Pretoria, 1997, p. 107.

It must also be recalled that although state primary and secondary education is generally school-based, NGOs and others are often involved in pioneering innovations and improvising education with groups who do not have access to schools or have a life-style for which schools are not the immediate solution. Such groups may include travelling and working children, street children, other children who work from economic necessity, child heads of household and nomadic learners. But education is not solely about schooling. Here also methods are being sought out to involve the beneficiaries in meaningful decisions about their own participation.

All education systems have to provide for adaptation to changing cultural, social, economic and environmental circumstances. They have to consider new methods of working, question outdated structures and procedures, and provide for a dynamic balance of social, cultural, economic and environmental conservation and change. These two tendencies towards conservation and towards change represent just one of the many dual tensions in any social system, as do others between integration and pluralism and between centralization and devolution. But the policy options for fostering the momentum for creative and peaceful change are not bald alternatives: integration, separation; separation for all, separation for none; centralization, no centralization; concentration, dispersal; participation, no participation; social cohesion, no social cohesion. Rather there is an endless series of policy options, each of which represents a balance along a continuum. In this respect, there is a tension currently among the advo-

cates of inclusive education between those, on the one hand, who see such a reform as amenable through piecemeal change of curriculum, governance, administration, supervision or teacher education or some other aspect and those, on the other hand, who see a systemic approach covering all major elements and embodied in an immediate and coherent package of reforms as being essential.⁶²

Social and educational change may result from policies that embrace and foster pluralism. But too much pluralism too quickly and there may be a danger of social disintegration. There is a lesson here for enthusiastic inclusive educators. Inclusive education is not about the same homogeneous, off-the-shelf package for all. In that sense, it is about a pluralism of responses to a pluralism of individual needs. To address that pluralism of responses, greater cultural and social exchange, partnership and participation at all levels, including among governments, NGOs and international agencies, as well as beneficiaries and communities will be needed. Moreover, participation cannot be endless in the sense that too great an emphasis on participation before any decision is made can stultify and totally frustrate the decision-making process. Too little participation, of course, as has been argued above, can equally lead to alienation and irresponsibility. Too much centralization divorces the action from the locality, but too little may lead to lack of co-ordination, poorer standards and an absence of tracing mechanisms for financing and of monitoring of academic outcomes, and thus to increased waste. These are the dilemmas which are the bedfellows of inclusive education, and they demand a high level of training and human sensitivity from the professionals involved in their resolution.

It is indisputable that policy-makers and experts in developing countries pursuing policies of inclusion in education are rarely faced by a simple binary decision, let alone a single choice. Rather, they are usually confronted by a series of policy options, a gradation of institutional arrangements from total separation to total inclusion, representing a balance to be drawn between extremes, neither of which may be practicable or desirable in its exclusivity and extremity. The commitment to inclusive education involves a recognition that participatory educational development has a critical and irreplaceable function in promoting human rights, social equality and justice. As one definition of participatory development indicates: 'Participatory development is a process through which stakeholders influence and share control over development initiatives, and the decisions and resources which affect them' (World Bank, 1994).

The Jomtien Conference was convinced of the need for partnership and participation as keys to achieving education for all, not least in identifying the very important potential contribution of the traditional learning systems in many societies (Fordham, 1991, p. 51 et seq.). That identification also

underpinned the work done in preparation for the successor Dakar Forum (Bray, 2000). The Recife Declaration of the E-9 countries declared a goal of increasing the participation of civil society, including the local community. The Regional Framework for Action adopted by the Conference on Education for All in Europe and North America embraces the development of a national plan in consultation with all stakeholders and the setting up of institutional and legal formulae to ensure a real sharing of responsibility. All of these agreements and instruments embody a recognition of the need for participation of beneficiaries. As yet, however, only a few have argued that participation must respond to the values of democracy and human rights if it is to achieve full inclusion.

As argued above, the aim of participation in a democratic society, or one aiming to become democratic, cannot be solely to enlist the energies of the beneficiaries in the reproduction of existing social inequalities, but rather to assist them in overcoming such inequalities, and this applies as much to inclusive education as to any other sphere of social provision. Such an approach encourages a dispersal of control, delegates authority and allows for a greater margin of discretionary decision-making than is the case in the more usual hand-me-down provision. The experience seems to be that, where control is concentrated and little real decision-making discretion ever reaches the periphery, policy alienation is an inevitable consequence. Where meaningful power is delegated to the periphery, to the persons who are in touch with the very factors that cannot be controlled by central policy-makers, (Elmore, 1989) greater commitment to goals and greater efficiency are likely, as well as greater flexibility in adapting to local conditions and circumstances and the diversity of local needs and cultures within a given country or locality.

But to argue that engagement with beneficiaries and the local community requires a high degree of potent participation is not to argue that there is some universal recipe or monolithic solution. Quite the reverse. There will always be the need for

a diversity of strategies. One way of adopting an approach that is sensitive to pluralism in developing countries is 'participative rural appraisal', which involves learning from and with local people. The results of this participatory approach tend to be substantially accurate, precisely because they draw on local people's knowledge of local conditions, and more workable because they take account of local ecological, social, cultural and financial conditions. But, the approach also seeks to empower local people to understand, increase their control and initiate processes that develop in turn social capital which remains after the donors have departed (Heaver, 1991, pp. 3–4).

While in industrialized countries there is increasing experience of such an engagement with diversity, there are few countries that can claim to have done so successfully. In the United States, the major distinguishing mark of American society has been the extent to which its education system has engaged with ethnic diversity to forge a durable civic culture from a plethora of diverse ethnic identities and interests. But the price of political stability is not only eternal vigilance, but also constant change. Yet, even given the difficulties of constant change, that country has sought, building on the concept of voluntary pluralism, to construct a political culture of 'integrative democracy' which has left to each individual or group the decision as to whether and how to express their ethnic appurtenance and attachments. The approach has been markedly different from that adopted by many countries located in the 'old world'.⁶³

Few would deny the importance of parents and carers of learners with impairments feeling a sense of identification with their school and its provision, as well as the organizations or institutions in which they work or which work for them and their children. It is true that, according to a UNESCO survey conducted in the mid-1990s, only a few countries have offered parents a charter that encompasses their rights to participation and influence.⁶⁴ Most countries did not give parents an absolute right to choose a particular form of education for their child. Many did, however, encourage their professionals to involve parents and carers as much as possible (UNESCO, 1995, p. 23). But there is a discernible movement to recognize everywhere that communal values and ideals, not least in rural areas, have an important function in welding people together in community and in securing the political stability and confidence essential for educational and wider economic progress. Indeed, it has been argued that it is this communitarian ideal which has generated the social bonds of trust that have been essential for economic development under a market economy.⁶⁵ Thus, participatory approaches to inclusive educational development are both directly and vicariously generating the very foundation that would appear to be necessary not only for educational change, but also for economic confidence among communities and for overall national development.

■ **Box 22. Community involvement in learning centres in Uganda**

The learning centres in the villages and *kraals* are identified through community involvement. The centres are semi-permanent, grass-thatched houses, erected within the compounds of highly respected and influential elders. Although District Education Commissioners and Officers establish the criteria for teacher recruitment, the local community participates directly in the identification and eventual recruitment of village and *kraal* teachers. Local school leavers are identified and trained to teach the children in the villages. School committees are established for every school, comprising elders, chiefs, teachers and parents.

Source: Excerpt from a UNESCO-commissioned case study on inclusive education in Uganda.

Improving the conditions for learning

The issue of barriers to learning has already been addressed in this report, but it is important to consider the measures that are necessary to address them if the right conditions for learning are to be provided and inclusive education is to be achieved. Sometimes there are physical barriers, such as lack of wheelchair access, of visual or aural aids or of separate toilets for female students, which inhibit or prevent inclusion. Sometimes, it is lack of physical accommodation or dilapidated and dangerous buildings which inhibit attendance. Many learners face barriers to learning and participation within learning centres because of poor nutrition or lack of a supportive environment at home. In many schools in developing countries, the absence of basic resources such as water and sanitation, and learning resources such as books, paper and writing instruments, impedes effective learning. In some cases, it is the preparation, commitment and attitudes of staff, and the relevance and accessibility of the curriculum which prevent the appropriate conditions for learning.

Many learners arrive at learning centres unready for learning. They are perhaps unable to concentrate because of hunger or tired from a long trek or pre-school agricultural or other work, or there is an absence of a pure water facility on the school site. In some places, both in countries of the North and the South, the security of buildings or access to them is a problem. Not only is it difficult to keep any equipment on the learning centre premises, but the dangers of attendance for female students are too great to permit them to attend. Such difficulties can be reduced when communities feel ownership of their local learning centres and co-operate in a provision that accommodates to their concerns, for example about the safety of their daughters, and that suits their perceived cultural needs and traditions. Sometimes that provision may involve several centres for their community rather than just one.⁶⁶

Improving the conditions for learning means not just attention to physical prerequisites of participation, although they are important, but also setting out the goals, and identifying and agreeing upon the means to achieve those goals through a dialogue process with the local community. What do they think is needed to improve conditions for learning? With marked similarities to the Index approach discussed before, the effective schools approach, developed by Heneveld, also offers a school development strategy based on the assessment of the context as well as an evaluation of where the school is now. Its conceptual framework for such a process includes: a) supporting inputs, such as strong community and parent support, b) school climate, including high expectations of students, c) enabling conditions, including high time in school and, d) the teaching/learning process, plus frequent student assessment and feedback (Heneveld, 1994, p. 6).

These four dimensions of an effective school should be expressive of human rights, which can be sensitive to individual

needs, and to local and national culture, and can at the same time facilitate the maximum learning and social development of learners, especially those with impairments. An ordered environment requires making explicit the basis on which that order rests. Respect for individuals and their human rights is an indispensable and central goal of inclusive education which can produce an ordered environment expressive of an ethos of success and self-esteem for all learners, where expectations are high but differentiated for all learners. The rationale for such an ethos needs to be reflected in a negotiated institutional policy statement, including curriculum, teaching/learning methods, assessment procedures and structures, and needs to be available for review, consultation and necessary amendment.

■ Box 23. The open school methodology in Brazil

The school in question follows the open school methodology, in which the students themselves shape their own pathway, in their own rhythm and not at a timing dictated by the system. The students progress to the next level as soon as they accomplish a particular task and their performance and behaviour are assessed daily. If the students find that they need to interrupt their schooling, they can pick up again from the point at which they stopped. There is no repetition in this school and promotion takes place as and when it fits in with the student's learning. There are no formal tests. With a 'pass card', the students shape their own school day and agenda, plan their own activities and set out their own learning. The curriculum with which the teachers work is found in the daily lives of the students. Besides learning basic skills, the students also learn about basic health and nutrition. The school is open all day long and the students receive their meals there. The school has a basic rule never to give up on a student.

Source: Extract from a case study of inclusive education in Brazil, commissioned by UNESCO in 1998.

Following this rationale, in most countries there are now instructive attempts to increase the participation, not only of parents and communities, but also of learners in decisions about their own learning, its location, content, pace and rhythm. The 1995 Act in India has already been cited as an example of legislation at national level providing for the participation of those with impairments in decision-making about their own provision. Moreover, in learning centres attempting to become more inclusive, the development of a supportive community and social context for staff and learners is increasingly regarded as important to the encouragement of academic attainment. In other words, social learning and academic learning are recognized as interdependent and equal goals. The basis for sustainable inclusive development within any learning centre is thus increasingly seen as dependent on the emergence of an inclusive culture underpinned by shared values which can be passed on to new members of the centre's community.

A framework for curriculum delivery

But what kind of approach to the content of the curriculum would be appropriate to an inclusive ethos. What constitutes worthwhile 'inclusionary' knowledge? The answer is that there is no one way of packaging a curriculum and its content appropriate to the full diversity of learners. In response to the challenge of educating learners from diverse backgrounds, Mexico, in common with many other countries, is now seeking to abandon the former parallel curriculum structure for the regular and special systems, a structure which has tended to exclude and marginalize. Instead, in line with its perception of the multicultural and multilingual nature of Mexican society, a broad-based, quality and flexible basic curriculum is being adopted which is sensitive to the needs of all students, albeit one that is optional in some of its parts (Ramos and Fetcher, 1998). Some nations such as the United Kingdom and France prescribe a national curriculum for all pupils. To others such as the United States, such an imposition would be anathema, although there is national scholastic testing. Some developing countries, such as India and Bangladesh, have developed what they call the essential learning curriculum (ELC), comprising linguistic, mathematical, physical, scientific, social, aesthetic, spatial and spiritual dimensions.

But there are still particular problems associated with the generation and transmission of knowledge in many developing countries of Africa. In some cases, their textbooks and curricula are 'off-the-shelf' products, developed in a European metropolitan language and culture, which are neither conducive to a responsive approach to teaching nor expressive of learner-centred methods and approaches, grounded in values of democracy and human rights required in moving towards inclusive education. For inclusive education, each learning centre has to provide, within whatever national guidelines apply, a framework for the learning of all its learners, covering all major areas of human apprehension. But there are myriad ways of organizing, packaging and delivering the forms of knowledge, all of which can be expressive of the same goals of inclusion and human rights. Moreover, there are differing ways of monitoring the transmission of knowledge in education, through national assessment systems, as in the United States, through national examinations systems, as in England and through school-based continuous or summative examining, as in Austria or Germany.

That framework for learning, attentive to the goals of inclusive education, will concern not just the knowledge, skills, attitudes and values to be transmitted and the methods for monitoring and assessment attainment in academic learning. It will also encompass an ethos and values of inclusion; what one could describe as feeling comfortable with diversity; and institutional structures, processes and procedures expressive of human rights, equity and democratic practice. In a sense, it does not matter what way the knowledge of the curriculum is packaged, provided that it embraces a coherent and holistic overview of

all the learning that a learner is expected to encounter in progression through and completion of the cycle, making sure that it does not exclude any major means of knowing and understanding. It must also, of course, be receptive to change and sufficiently malleable for the insertion of new knowledge into the curricular structure. The framework needs to acknowledge both affective and cognitive dimensions of knowledge, and the need for the development of psycho-motor capacities, as well as the fact that the structure and procedures of the school also transmit values and knowledge. Finally, it must also leave sufficient flexibility to the professionals on the ground to adapt the content and its delivery to the individual needs of the full diversity of learners, in the context of the local community and indigenous knowledge.

■ **Box 24. An extensive and flexible curriculum, diversifiable and adaptable to social, cultural and individual differences**

The common curriculum must be the reference for all students, including those with disabilities. Educational administrations must establish general objectives and content common for every student, leaving an autonomous gap for schools to enrich and adapt the common curriculum to the social cultural, linguistic and individual characteristics of their students. Meeting the needs of diversity also involves an extensive curriculum, balanced in terms of the kinds of competences and content that it includes, including knowledge, skills and values. It should be functional and meaningful for each child.

Source: R. B. Guijarro, 'Inclusive Education in Latin America', in World Education Forum, Dakar, Senegal, 26–28 April 2000, Strategy Session 1.3, Making Inclusive Education a Reality, 2000, p. 31.

Of course, it has to be remembered that learners with impairments may need special consideration and support in the delivery of the ordinary curriculum. They, may, for example, have problems of mobility and seating, of impaired hand functions, of impaired communication, or of visual or auditory impairments, which means that special arrangement may be required in the local school and classroom, to make sure that they have an equal chance of learning. There may also be issues of personal and social development, associated with their impairment, that will require professional sensitivity and more dedicated liaison with parents. The important point for educators to bear in mind is the lack of direct correlation between intellectual capacity and physical impairment, and the need to provide all learners with a learner-friendly learning centre.⁶⁷

As a learners' educational development is closely linked to early experience prior to entering a learning centre, pupils with hearing or visual impairments may not be able to make satisfactory progress without some special arrangements in the school and the classroom. Without their special communication needs being catered for, they may experience serious learning difficulties, although their basic intellectual capacity

and biography may in no way be affected by their impairment. On the other hand, some pupils without serious sensory or physical impairment may suffer from intellectual impairment, which may cause a slower rate of maturation, social adjustment and learning progress in some subject areas. But once again, the message is clear that learners are individuals and have individual needs. The last thing that learners with impairments need is to be stereotyped. All learners have the same right to be provided with a variety of learning opportunities and styles, which will enable them to develop their own natural gifts at their own speed, according to their own learning biography, to the fullest possible capacity.

Producing inclusive learning centre policies

Unless they are to be ineffectual hand-me-downs, the production of policies for learning centres implies the pre-existence of procedures and mechanisms for that process of production. Communities, personnel, parents and learners will need to be involved and indeed increasingly are involved. Any strategy to increase inclusion must involve authorities and learning centres having to co-operate to identify barriers to learning and participation within all aspects of their work and to construct policies to minimize or eradicate them together. The precise nature of these policies depends on the cultural, social and economic characteristics of a particular area. Inclusive education involves staff and communities as well as learners.

As under the BRAC system in Bangladesh, it is necessary to ensure that all staff appointments and promotions are considered for their harmony with local conditions and with an attempt to make the teaching staff representative of the communities of the learners. Local recruitment, training and deployment can help to overcome a major problem in many developing countries of the central appointment of staff to rural areas, of which they have no experience and with which they have little identification. Local – or at least regional – appointment of teachers is becoming more common, and a number of countries now have policies for recruiting new teachers from the surrounding area, reducing barriers to their attendance, for example by making local arrangements for them to collect their pay and providing housing. Gender quotas for teachers, linked to additional donor support, has been tried in a number of countries to encourage parents to send their girls to school.

There is considerable variation in the support that is available for staff and learners, and how it is used in different countries, even in different localities. Inclusive support can be defined as all those activities that increase the capacity of the staff in learning centres to respond to the diversity of all their learners. All staff development activities and any support policies need to have this as an aim, an aim that needs to be shared with support agencies external to the school with the help of local edu-

cational administrations. Sometimes this can occur with the intensive support of the state apparatus, such as district or regional offices, or the inspectorate. On other occasions, as in the UNICEF-supported IDEAL Project in Bangladesh, it takes place on an intensive district basis in conjunction with an NGO, or a bilateral or multilateral agency (UNICEF, 1998).

Evolving inclusive teaching and learning practices

With the support of staff development activities, learning centres attempting to become more inclusive increase the responsiveness of lessons to the diversity of learners. The curriculum itself can foster an understanding of difference and respect for diversity, as can the teaching/learning strategies adopted. The movement to individualized curricular adaptations is very strong in a number of countries, particularly in Latin America, which can reassure all students that they are sharing the same learning while providing special adaptation for special cases. Such a strategy can also embody procedures for making all new learners and all new staff feel settled, secure and ready for learning and teaching.

■ Box 25. Itinerant specialist teachers in Kenya

The Kenya Society for the Blind was keen to increase the enrolment of blind children in education. For a number of reasons, the best option for them was to persuade the regular schools to enrol both blind and visually impaired children, and to provide specialist support. The pilot stage began with one school in Nairobi. The itinerant support teacher was involved in several kinds of activity: teaching Braille reading and writing, orientation and mobility. He also assisted the class teacher to maximize learning through talking and listening. He arranged meetings with teachers to discuss the progress of blind and visually impaired children, and how the children and the teachers could help them. He also visited the homes of blind children to assist with early stimulation and to prepare children and their parents for the entry into the regular school.

In some cases, where diversity leads to conflict, policies are put in place to minimize bullying between any members of the learning centre community. Sometimes particular arrangements need to be made so that learners are not disadvantaged because their home language is different from the language of instruction or they have different ethnic or creedal allegiances. Teachers are increasingly sensitive to language and their task to try to ensure that the words, expressions and concepts which they use are understood by learners or are explained to them. The details of inclusive teaching strategies differ depending on available resources, but the principles are constant: learning and teaching are flexible, adaptive and varied, differentiated and responsive, collaborative, active, and draw on all available

resources of teachers, other staff, learners, parents/carers and communities. Above all, they are respectful of the cultures of the learners and their families.

It is a truism that, in a world of resource scarcity, many learning centres and their communities have resources to support education that are not fully mobilized. The resource which is the community is one of the most important of these. The lower the staffing levels and material resources, the more important it becomes to release the potential in under-used resources in the school and in the surrounding community. The diversity of learners is itself a rich resource for learning. All learners irrespective of their attainment – or impairment – can also be teachers. There are examples of learning centres skilfully employing the difference between learners in terms of maturity and skills to enhance learning opportunities. The Child-to-Child approach, for example, draws on children to act as resources for their communities. Parents of all learners have a deep knowledge about their children and this can be particularly valuable for children and young people whose learning becomes a focus of concern, such as some learners with impairments. There are thus learning opportunities within all communities which can be exploited for education.

To include all learners, it is increasingly recognized that the development of an ordered, safe, secure, accepting, collaborating and stimulating community is essential; one in which everyone is valued for their contribution and that is based on the permeation of human rights into all facets of the school's functions. Such an environment can be the basis for encouraging the achievement of all learners. It involves making all learners, parents/carers and community members welcome and valuing them all equally. In such cases, there is a concern to uncover and minimize barriers to learning and participation in all areas of the learning centre and to remove all forms of discrimination.

This philosophy does not, however, mean that all provision will be the same, regardless of place, clientele, needs and context. But it does presuppose encapsulating that pedagogy within a negotiated overall institutional philosophy to enable the insti-

tution to function in a responsive, efficient, orderly, humane and just manner. A list of goals for such a negotiated institutional policy to 'cocoon' a flexible but universal curriculum might include:⁶⁸

- planning an ordered environment, expressive of local and national culture, conducive to the maximum learning and social development of all learners;
- accepting the involvement and full participation of parents and the local community, and the important contribution of indigenous knowledge;
- developing a school ethos of trustworthiness and human reciprocity, based on the human rights of all, teachers and learners;
- setting high expectations for the behaviour and work of all members of the school community;
- engendering a commitment to human rights, excellence, justice, equality and mutuality in all aspects of the school's structure and processes;
- accepting the goal of the development of the full intellectual emotional, physical, spiritual and moral potential of all learners;
- encouraging self-esteem, self-confidence and social responsibility in pupils and a commitment to human rights and pluralist democracy;
- developing an understanding of the interdependence of humans with their ecosystem, an engagement for environmental conservation and an understanding of the importance of health and nutrition;
- preparing learners for active membership of their communities and their nation; and
- empowering learners to become economically literate, viable and responsible, fully aware of the interdependence of economic and environmental decisions, and of communities and nations.⁶⁹

■ **Box 26. Curricular integration for inclusion in Mexico**

As a basis for the restructuring of special education services in Mexico, a basic principle is that of the common basic education curriculum as a framework for all educational interventions for all children. Even at the *centres de attention multiple*, where those with severe disabilities attend, the learning is based on this frame. In the case of children from different ethnic groups, migrating children, street children, etc, the official curriculum forms the basis, which is then adapted to their need and characteristics, maintaining the same objectives and modifying the content, the strategies and the means.

Human resources and inclusion

Inclusive education and the development of inclusive capacity

Given that inclusive education draws on the values of human rights and democracy, there are three major rationales that are commonly advanced for the development of capacity for inclusive provision of education: (a) humanitarian, (b) economic and (c) individual utilitarian. In the first case, education is a basic human right for all children, supported by a number of United Nations instruments including the Universal Declaration of Human Rights, the Convention on the Rights of the Child (1989) and The World Declaration on the Survival, Protection and Development of Children, which followed the 1990 World Summit for Children. Although these international instruments do not necessarily provide operational guidelines or mandates by which particular policies might be implemented, they do establish an ambience, a vision, an intellectual context and the parameters of responsibilities and expectations for the international and national debate about the development of human capacity.

The case for 'inclusive' education is increasingly advanced on economic grounds. It has to make economic sense and contribute to greater economic and social development and nation building. At present, there is almost universal acceptance that there is economic advantage in developing the strategy of EFA and economic deficit associated with neglect. For this reason and taking account of the costs of lifelong dependency on family, community and nation, that neglect involves, the economic returns on investments in inclusive education are more and more seen as a central means to poverty alleviation. Thus capacity development for inclusive education is an investment like any other investment in human resources, in local economic and social advancement, and in national development.

The individual utilitarian value of inclusive education cannot to be measured solely in social or economic terms. The inclusion of all children is a manifest expressive not only of a commitment to poverty alleviation, equity, and economic and broader social and human resource development, but it also highlights the key role to be played by education in empowering people to take ownership of their own lives, to develop themselves to the full and to participate in the development process for themselves, their children and their community. The more a local community can develop the capacity to take responsibility for its own destiny, the more opportunity for the community to become politically active in a democratic order and economically active in national development.

But, even given the need for learning centres to be supported by central and regional governments, capacity development does not need to be seen as separate for each learning centre. Indeed there are substantial advantages, where it is practicable, for centres to join together to help each other and for the utilization of such mechanisms as cascades, clusters and the deployment of itinerant teachers for particularly scarce specialisms. In this way, capacity development is regarded as a collective effort by a number of schools to group together and learn to share their scarce resources. The cluster approach to the provision of in-service education of teachers through the *upazila* resource centres in Bangladesh is one example of just such a model appropriate to the country's needs and resources; a model has existed over many years now. The district-based support to primary education in the United Republic of Tanzania, supported by Denmark, Finland and the Netherlands, is another model, combining the development of school clusters and the establishment of teacher resource centres, and aiming at the improvement of teacher performance, and of planning and monitoring at both district and school levels.

The Project Integrated Education for the Disabled (PIED) in India is a particularly powerful example of the advantages of a coherent national strategy with strong emphasis on human resource development and materials production linked together even in a resource-poor system. The project involves coherence across three levels of training at three levels of depth of expertise. This scheme includes the training and appointment of special cluster support teachers, combined with the utilization of a UNESCO-supported teacher-education resource pack, aimed at developing reflective teachers, capable of problem-solving approaches to inclusion (UNESCO, 1994, pp. 33 et seq.).

■ **Box 27. Some major economic benefits which may accrue from inclusive education**

- Increased potential productivity and wealth creation from more and better human resources.
- Reduction in administrative and other recurrent overheads associated with reduction of social welfare and other future dependency costs.
- Increased government revenue from taxes paid, which can, in part, be used to recoup the costs of the initial education.
- Reduction in school grade repetition and drop-out rates (through the overall improvement of quality of primary education).
- Economies of scale from the unification of separate special and regular education for the vast majority of learners.
- Reduced costs for transportation and institutional provision typically associated with segregated services.
- Improved economic performance of schools and systems.

One major problem with the development of inclusive education is that it appears to demand simultaneous change in a number of sectors at the same time, although some advocates would deny this. Some argue that for such change to be effective in systems undergoing inclusive development, change has to be introduced at all levels and sectors of the system simultaneously, if it is not to be undermined. Clearly, those in central government directing change must have detailed knowledge of their education system, of the policies and potentials of the system, and of the overall strategy and financing plan for inclusive educational developments. At regional level, administrators and advisers similarly need to have an overview of how their district fits into the national plan, as well as detailed knowledge of their own area, as a preparation for advocacy for its cause.

Head teachers play a critical role of leadership and exemplary professionalism in the movement towards inclusive education, and they must have political and human relations skills. Teachers play a pivotal role in encouraging more inclusive, flexible and responsive ways of working, although in many cases they also carry teaching and academic traditions that support a less inclusive system of education. Some may find that qualifications gained in major urban centres of the country have not prepared them sufficiently for their own educational realities in a local and rural community. They may have grown up in relatively affluent urban circumstances, amongst communities unfamiliar with the rural conditions and cultures of many learners. They too need to be supported in their journey to new thinking in order to overcome their own prejudices about excluded learners in general and learners with impairments in particular. So the question arises concerning what new and different demands for training, support and professional development and levied by the movement to inclusive education at the different levels.

Revising the training of educational personnel

Inclusive education requires a holistic human development policy for the training of educational personnel, one that addresses delivery at a number of different levels and through several modalities throughout the professional lives of those professionals and, in some cases, in an intersectoral and inter-professional context. By personnel is meant administrative and managerial, supervisory and support, ancillary and teaching staff. All such staff need to have access to three major phases of professional development: initial training, professional induction and in-service, post-experience training. There should ideally be coherence and interrelationship among these phases. Currently coverage of inclusive education at any of these three stages, where they do exist, is sparse. A UNESCO survey of initial training from the mid-1990s, for example, found that some countries included some coverage of special educational needs within general initial teacher education, although quite a large

number reported that they had no such coverage. It may of course be argued that some of the goals of inclusive education, addressing a less traditional role for the teacher, can be covered through appropriate induction, and in-service updating and upgrading of teachers. There are a few examples illustrative of this approach, using a number of different strategies; some of these are described in the following sections.

In India, for example, as a consequence of the National Plan for Education, an attempt was made to address this issue in a more systemic way, including the organization of training camps for teachers, the establishment of District Institutes of Education and Training in each district, upgrading of some secondary schools to colleges of teacher education and institutes of advanced studies in education, the strengthening of institutions at national level and the establishment in 1995 of the National Council for Teacher Education. In addition, teacher education has been decentralized down to block and cluster levels (India, Ministry of Human . . . , 2000, pp. 31 et seq.). But not all countries are able to mount such a national campaign and it may be in the early stages of inclusive education that more ad hoc provision may be required. In Paraguay, an alternative approach, based on the Colombian *escuela nueva* project is centred on the improvement of the quality of education in high risk schools, aiming to achieve a positive response to cultural and linguistic diversity. The project has created micro centres where teachers can work to develop their pedagogical practice and to prepare teaching materials and learning guides. Teachers are encouraged to work together in networks in order to pursue their professional development, supported by a local technical team from the local teachers college and from the Delegacion de Educacion.⁷⁰

But of course, and especially in some developing countries, many teachers and other personnel have little or no access to induction or post-experience training, let alone professional support. This is one of the reasons why professional morale among teachers in rural areas tends to be so low. Moreover, in a large number of countries a rigid separation continues to be maintained between special and mainstream teacher education, and this discourages the development of inclusive teaching approaches. In some cases the qualifications regimes do not permit specialist teachers to teach regular classes or regular teachers to teach children described as having special needs, although there has been a growing recognition that any specialist should follow a common general training. In some cases, there are very real dilemmas. For example, the attendance of an epileptic child may demand skills of response which a teacher may be capable of or feel comfortable with.

The issue of the intellectual 'baggage' or personal and professional biography of the teacher is increasingly raised. Issues such as the cultural and social representativeness of education personnel have now become major sources of concern and attention by major donors. It is for example no longer considered sufficient that there is full participation of boys and girls.

It is now recognized that this can only be achieved where women are adequately represented among the educational personnel, as teachers, administrators, supervisors, curriculum developers, planners etc. In particular the presence of a sufficiency of female teachers in a school have been seen as a major determinant of the participation of girls for at least a decade now (Herz et al., 1991).

But an associated problem frequently encountered is that the teaching force is neither representative of nor sensitive to the ethnic groups, linguistic communities, cultural traditions, caste and social systems, and impairments within the population. This disjuncture between the culture of the teacher and that of learners and learning centre communities is a major barrier to inclusive education and one which is not easily susceptible to resolution. To correct this requires a responsive but sensitive and concerted strategy. Such a strategy will need to take into account the normative re-educative nature of the professional development involved. Depending on the local situation, it may need to include wider cultural participation in the teaching force with positive discrimination, if necessary, local recruitment, and training and continuous professional development and support. These elements will need to be backed up by frequent monitoring and evaluation.

For many teachers the content of their training remains abstract and unrelated to the nature of the teaching job and the conditions in which they work; there is a million-mile separation between theory and practice. Inclusive initial teacher education requires methods that are themselves inclusive. But in some teacher education institutions in both the North and the South, teacher educators attempt to teach a content about active learning in diverse classrooms using passive methods that take no account of the prospective teachers' backgrounds and experiences. On many teacher education courses, inclusion is considered in separate sessions, usually associated with learners with impairments or those categorized as having 'special educational needs', rather than permeating the approach to education in all courses for all students.

The basic craft concept of the teachers' role in many developing countries has not by and large achieved the efficient transmission of the adaptive and flexible role required by modern school systems. For example, although many teachers teach in multigrade schools and movements to inclusion imply the need for diversified methods and group teaching, it is unusual for the initial training of teachers to include a major component, or in some cases any component at all, about family grouping and peer teaching techniques (UNESCO, 1989). Teachers in some countries are sometimes faced with classes of 100 or more students and in such circumstances innovative teaching methods are unlikely to be the first order of the day, although the use of a modified monitorial system would seem to commend itself. A further dimension of the non-fit of training and practice is that, although the goal of recruiting more girls into primary education may be set at the

systemic level of the education system, it may remain untreated in teacher education either in its content or socialization processes. In any case, the composition of the lecturers in teacher education may give the lie to that interpretation of gender equity, however sincerely it may be declared by politicians and educationists.

Nor, as was evident earlier in this section in the discussion of ethnic and gender dislocation between learner and teacher, is the issue of inclusive teacher education to be considered solely in terms of knowledge. Teachers' colleges and agencies of induction and in-service teacher training transmit both instrumental and affective knowledge. In many parts of the world, their declared and operative values are often in conflict. Thus, although the concept of inclusive education may be a declared goal of education in many countries, as indicated earlier in this report, there is still little or nothing about it in the organization, knowledge and socialization processes of initial teacher education, a fact that tends to speak eloquently but silently of the reverse. Although educators may profess a more learner-centred approach to education, the methods of teaching and learning employed in teacher education may contradict that commitment and the teacher trainers may remain unconvinced. While educationists demand community orientation in the role of the teacher, the college course remains silent as regards the knowledge delivered or its processes or both. Where the systemic rhetoric or that of donor agencies is of multigrade teaching, the reality on the ground is that it is widely neglected in programmes of initial teacher education. One reason for this is, of course, the relative absence of ongoing training-the-trainers programmes, which could facilitate the change in values needed for inclusive education, not least from absolutist to accountable professionalism.

Thus, the adoption of more flexible methods of teaching and learning, as well as new roles such as those adopted in the *escuela nueva*, is sometimes made more difficult by inefficient and dysfunctional traditional teacher training, largely wedded to values that recreate and reproduce rather than innovate and change. In spite of some commendable initiatives, initial teacher education tends to rest on a book-centred and 'banking' approach to teaching by exclusively or predominantly lecture methods (Schiefelbein, 1991). Moreover, depending on the proportion leaving the stock of teachers each year, a change-over of only 5 to 10 per cent per annum in the stock of teachers is unlikely to assist greatly in innovating towards inclusive education. So initial teacher education alone is not the instrument for rapid change. Rather, in-service teacher education, school-based at least in part, is likely to be better instrument to overcome the cultural lockstep between training and teaching, which constitutes a major block to inclusive education. This fact tends to transfer the major onus for matching the development of inclusive education to the preparation of teachers to the level of post-experience work. There are important resource implications concerned with the distribution of the available funding across the three phases of teacher education.

Some policies that have been proposed or in some cases implemented to reduce or eliminate that cultural lockstep are: allocate more resources to regular systematic in-service education for the bulk of the stock of teachers, rather than to initial teacher education; change the balance between initial and in-service education; offer incentives to attract capable individuals to teaching and to retain them; introduce periodic re-certification, linked to in-service training; base educational evaluation, including teacher appraisal, on performance indicators linked to inclusive education; improve and interrelate teacher deployment and utilization of classrooms, introducing premiums for teacher attendance; recruit more women, people from ethnic minorities and people with impairments; recruit and train more teachers in their locality; sensitize all teachers in both in initial and in-service training to accommodate to special needs, offering multi-grade and multi-disciplinary competencies; let student teachers, especially in developing countries, spend a larger proportion of their time in translating educational theory into practice in classrooms, especially rural ones; make arrangements for teachers and teacher trainers to receive periodic upgrading of skills through continuing education; link together teacher training, curriculum development and inclusive education, and make sure they are contextually relevant; introduce incentives to persuade school and college staffs to work more closely together; and expect college staff to periodically reassert their credibility in professional practice in inclusive education.

Encouraging professional staff development at all levels

Staff development activities are most successful when they are linked to whole school or whole college improvement strategies, which can also include focused activities arranged according to expressed professional needs. Cascade models of training, which attempt to multiply the effect of limited training resources, require groups of teachers from one learning centre to train together, supported by the head teacher, if they are to be able to effect changes in their practice and spread practice to other institutions. Arranging learning centres in clusters widens the resources available for training and dissemination, although the downside is that it inevitably tends to detach the training from the individual school context.

Such clusters can initially include special and mainstream centres sharing resources as a step towards greater inclusion. The knowledge of parents and disabled people can also form an effective part of staff and school development. In some countries, teaching assistants are employed, sometimes to support learners with impairments, but there are not always clear strategies for how these staff can support the learning and participation of all learners. The range of activities might include focused consultancies addressing the teaching of particular students, say for example, those with severe learning difficulties

who present challenging behaviour, within a whole school policy context (Harris et al., 1996).

This may involve some separate training but involvement of all staff in shared training activities provides a good model for collaboration. In this context, the *UNESCO Teacher Education Resource Pack: Special Needs in the Classroom* has been particularly influential in encouraging inclusive learning centre development in eighty countries. It involves teachers in a set of activities that give them experience of collaborative, inclusive teaching and learning strategies, and help them to incorporate these within their own thinking and practice. Despite its name, it discourages the division of learners into those with and without 'special needs'. It supports teachers in sharing and reflecting on their experience, and in drawing on the recorded and observed experience of others, in order to teach diverse groups together. An analogue approach to staff development is the scheme facilitated by the University of Cologne for exchange of information concerning consultancy in several European countries to support the professional development of staff involved in special educational needs (Spalding et al., 1996).

Countries differ greatly in the extent to which they have invested in specialists for learners who experience difficulties. These include teachers for particular categorized groups of learners with impairments, educational psychologists, speech therapists, occupational therapists, sign language interpreters and interpreters for those who do not speak the languages used in the school/ learning centre. In countries of the South, widespread employment of highly trained professionals may be prohibitively expensive and unavailable at times, and thus community-based support has to be constructed from people available in the education service and in the communities. In countries of the North and the South, if support is to be used efficiently, its role in increasing the capacity of learning centres to respond to diversity has to be recognized. It has to be based as close to learning centres as possible and to employ a social model of difficulties in learning. The support coming from specialist centres will need to adjust and match the new setting compatible with inclusive development.

The development of inclusive education levies constantly changing demands on teachers' values, attitudes and professional expertise and knowledge, as well as on those responsible for their training and support at whatever level. To deal with this 'sea-change of change', a continuous and coherent programme of professional development is needed for all educational personnel. Often encouraged by such donors as the United Nations Development Programme (UNDP), many countries now have overall national programmes for human resource development across the board. Such programmes can provide an ideal seedbed for systemic and institutional policies for staff development in the education sector and for policies aimed at pursuing inclusive education. Training and learning for education personnel to implement policies of inclusive edu-

education requires careful planning and continual guidance and monitoring if it is to produce the necessary physical, mental and moral abilities and predispositions. While such a policy needs to be holistic and continuous, it also needs to be diversified and differentiated. There is no point in all teachers in mainstreamed classes learning sign language, but some of them will have to.

If for no other reason than for the efficient use of scarce resources, the above policy requires a firm recognition of the need for a close working partnership of all the actors concerned in the ministries centrally, in the regions, districts, communities, schools and classrooms. Training provision, combined with other learning opportunities such as school-based sharing and consultancy, shadowing, short placements, micro-teaching, intervisiting, etc. will all need to contribute to the process of continuous professional development, through a variety of means, formal and non-formal, by teaching and by sharing, by job exchange, and by shadowing and intervisiting across different spheres of competence, such as human and community relations, teaching/learning methods, technology, management, financial control and regulation or subject content. Such a strategy will need to be co-ordinated and funded, and will certainly need to include some professional and/or personal incentives, such as progression along a career ladder, awards and other form of recognition. ■

Challenges and opportunities

From access to potent participation

In an increasing number of countries, there is acceptance that providing access for all learners to a local learning centre is only the first stage in overcoming the exclusion from education of learners, not least those with impairments. In some cases, where there is an almost total lack of incentives anywhere in the education system, symbolic and/or pecuniary incentives and motivation will need to be provided to parents, children and teachers. Relating predominantly to the gender deficit, the Bangladesh girls' scholarship programme is a good example of how agencies working together can motivate the excluded to include themselves, with important ripple effects onto social relations in the wider society. At the moment, and almost everywhere, teachers are poorly and sometimes irregularly paid, lowly esteemed, badly trained and sparsely supported. Consequently, in many developing countries, they are often not present in the classrooms. This stark fact alone, if it is not addressed on a priority basis, will inhibit or totally impede the movement to more inclusive systems of education.

But, the movement towards more inclusive education is not just a matter of extending access to an expensive system, which affords a poor quality product, often out of touch with the reality of the everyday lives of pupils. Indeed, it is not just about embracing all children by including them in education, but also about the quality, value for money and relevance of what is offered there. Currently in very many developing countries, the quality of the experience of learners in learning centres is appalling and in many cases, they are the source of illness and disease. Moreover, communities and parents are often marginalized or excluded, even where their children have been included. Participation in decision-making is non-existent or is a lip-service. Outreach activities to support parents, and to encourage and support them to send their children to school do exist and some models have been cited in this report, but they are few, elusive and not well documented. Yet as the President of the World Bank has rightly pointed out, the local level is the real key to poverty reduction. And the same applies to inclusive policies for education (Wolfensohn, 1999, p. 12).

But there is genuine cause for optimism that some countries and some schools have begun the task of laying a two-way street involving a rethink of the role of the school in the community and a refit of skills for many lay and professional personnel. They have realized that unless such prerequisites are delivered, the goals of inclusive education will remain sterile advocacy and empty words. At the centre of inclusive education, it has to be remembered, is a tender, growing human

being, often a young and vulnerable child, but regardless of capacities or impairments, with all the unlocked potential of a creative human being, in many cases but regretfully not always surrounded by the love of his/her family. It is the learner who needs to be at the core of efforts, the learner about whom we are thinking and speaking, and for whom we are advocating and planning. What is best for the child is the baseline criterion, not how can this child be fitted into inclusive education. It may not be the most difficult step, for there are many examples where the presence of a previously excluded learner acts as a catalyst for the improvement of teaching and learning and social relations for all students. Students taking caring and sometimes loving responsibility for a disabled student is one common example of the boundless capacity of human beings for compassionate engagement for others. The crucial stage in the process of including involves a capitalization on this compassion, and a shift of perspective and values from denial to the celebration of diversity and then the systematic fostering of high quality relationships, teaching and learning opportunities for all learners.

■ **Box 28. Parents' concerns for their child**

'Many of the decisions faced by parents of children with disabilities are unique: where can our children learn and grow so that they will be recognized and appreciated for their strengths and abilities? How can we begin early to help our children reach their fullest potential? How can we get the support we need in order to care for our children at home? In what settings can our children learn from other children? What can we do to ensure that they grow up as equal and valued members of society?'

Source: Roehrer Institute, Right off the Bat: A Study of Inclusive Child Care in Canada, North York, Ont., 1993, p. 1.

There is a growing experience in many countries of how barriers to learning and participation can be identified and reduced, and in some cases eliminated, so that previously excluded learners can be included. Some examples have been cited in this report and there are many more citable examples. This experience is a rich resource to support the more inclusive development of learning opportunities. However, sometimes people find it difficult to learn from the experience of others. They may see experience as invalid if it is gained in different circumstances, in different countries, in different areas of the same country, at a different level or in a different school. They may feel that learning from others is demeaning or that learning from others may mean adopting wholesale what others are doing, rather than being selective in a critical and principles manner. Enabling those advocating inclusive education and those responsible for its planning, implementation and evaluation to adopt a critical, reflective view of their own practice and that of others, so that they can absorb lessons from the instructive practice of others, remains a major challenge for those initiating inclusive change in education systems and learning centres.

Inclusive education is not a new initiative with an associated set of policies that are additional to existing educational activities. It is not a form of special needs education, but an alternative to it. It is concerned with the appropriate response to all aspects of diversity within the mainstream, in which learners with impairments are one important element. The needed extent of the continuation of separate special needs education policies represents one of the major challenges to the development of inclusive approaches to teaching and learning. So does the changing world in which we live and the new opportunities which it affords. In the era of the worldwide web, there really is scope for new hope, as the DOSVOX project for the blind has shown in Brazil (Borges, 1998, pp. 15–17).

In all countries there is a tendency for new labels to be given to educational initiatives associated with particular government departments or non-governmental organizations rather than to connect them with existing policies. Non-governmental organizations may find themselves in competition with each other to provide services and these services can be poorly integrated into or in some cases compete with State provision. In some areas, despite an overall shortage of resources, there are more unrelated interventions than the system can effectively absorb. While policy fragmentation and overlapping interventions are wasteful of resources in countries of the North, they have particularly serious consequences for the economically poorer nations of the South.

There is a need to bring together educational policies under labels such as 'community-based rehabilitation', 'social inclusion and exclusion', 'special needs education', 'health-promoting schools', 'child-friendly schools', integration and mainstreaming within the education for all framework so that education for all is truly concerned with providing a high quality education for all learners, where at all possible within their local communities. To overcome the fragmentation, tension and inefficiency that often occurs due to donors pulling in opposing directions, donors are increasingly uniting behind the government's policy and strategy for education within a sector wide approach (SWAp) that can unify policy implementation and resource allocation, with tracing and monitoring of outcomes (Ratcliff and Macrea, 1999). Such an approach is a difficult learning experience for all, not least donors, but initial results seem to indicate that the results are well worthwhile. Moreover, the alternative is to continue with the project based funding approach, with separate project implementation units or systems for each donor, requiring a myriad of different reporting formats and procedures, which very frequently undermine the competence and subvert the authority of the very Ministry they should be supporting and developing.

Involvement in education is an expression of hope for, nay confidence in, the future. The education for all movement recognizes that the exclusion from full participation in education, experienced by any individual, is not only a personal, community and national economic and social responsibilities, but

also a global responsibility and a global loss. In every region of the world, there are examples of practice inspired by inclusive values, at all levels of the system, a few of which have been cited in this report. They represent different styles, approaches and strategies, but a common philosophy for the inclusion of all learners, including those who have physical, sensory or intellectual impairments and those who suffer from situational disadvantage. Accompanying these developments, however, there are all the time new challenges that threaten to further exclude individuals from their human right to their personal, social and economic development. For people uprooted by environmental change, in the middle of violent conflict or recovering from its effects, living in continuing poverty or in regions suffering rapid economic decline, inclusive educational development can sometimes seem remote. But their need for policies of inclusion is perhaps even greater, if they are to successfully overcome their adversity. There are also challenges to the movement to inclusive provision of education globally and, in some respects, education is less inclusive, internationally, than it was at the time of the Jomtien conference. The new challenge of the information age, for example, is one where those in developing countries run the risk of a widening gap and of falling even further behind in the transformation of knowledge into economic and social progress. Yet such challenges can also be an opportunity to democratize knowledge and access to it.

For in such circumstances, the challenges need to be seen for what they are; opportunities to pursue the goal of inclusion more effectively. But educational interventions alone are insufficient. The carefully directed responses, formulated against the overall background of the goals of inclusive education, need to

■ **Box 29. New technology and inclusion**

'The other hopeful sign related to new technology. The information highway has given people with disabilities new advantages and opportunities never before available; people with even the most severe mobility impairments can now participate in knowledge-based industries without leaving their homes; blind people can use inexpensive adaptive devices that convert printed text to sound or Braille; through voice to text interfaces – that is computers that you can talk to – technology is now accessible to people who cannot use keyboards. And of course, electronic communication is of particular significance to people who are deaf or hearing impaired. But, perhaps the greatest advantage of the new technology is that people can communicate with each other without preconceived stereotypes based on a person's colour, sex, age, origin or disability. On the Internet, everyone is equal.'

Source: Extract from a speech by Michelle Falardeau-Ramsay, Chief Commissioner, Canadian Human Rights Commission, Quebec City, 22 October 1999.

be coordinated with other sectors and other professionals. Removing exclusion in and from education is part of the process of reducing exclusion in society, but it is not the whole task. Progress towards greater inclusion in education has to be seen in the context of policies for economic development and employment, both drawing from them and contributing to them. Inclusive educational development is one of the irreducible pillars of nation-building and of sustainable national development.

The need to think inclusively in education, as in other areas of society, has never been more important. Inclusive thinking is a reminder that education must be as concerned with the sustenance of communities as with personal achievement and national economic performance. Thinking inclusively about education allows us to recognize the undermining effects on social cohesion and the consequent economic costs of a narrow technical focus in education, where the sole concern is with 'what works' to increase average school attainment, narrowly conceived in terms of academic results. Inclusive education provides a route to educational development that is ethically and hence technically sustainable, because it provides a reasoned basis for action to achieve common goals in international organizations, governments, non-governmental organizations, communities and learning centres.

The mobility of people within and between countries has made human diversity more widely apparent, but has also generated increased tensions and social discrimination, including the social and educational exclusion of newly arrived migrants in some European countries. Even as the impact of the unequal distribution of the world's resources and opportunities is daily more apparent, there are still those who argue that policies of separation, containment and exclusion are the answer. Policies for social and educational inclusion challenge that facile assumption and argue to the contrary that the way ahead is to share and to include. There have been many painful reminders in the past decade of the threat to peace and stability that occurs when exclusion takes over as a state philosophy and diversity ceases to be valued, as well as the enormous human and economic cost of such policies. The International Commission on Education for the Twenty-first Century argued in its report to UNESCO that, in adopting 'a regard for diversity' as a fundamental principle and in 'combating all forms of exclusion' from education, we can restore education to its 'central place as a melting-pot' contributing to social harmony (Delors et al., 1996). In the words of the President of the World Bank, '... the time has come to get back to the dream. The dream of inclusive development' (Wolfensohn, 1997, p. 18). An essential ingredient of the realization of that dream has to be inclusive education. ■

Notes

1. The original Executive Summary for this report was written by Tony Booth, who also undertook much of the early collection of material in conjunction with UNESCO. Sai Vayrynen and Hildegunn Olsen of the UNESCO Section for Combating Exclusion in Education commented on the first drafts of this text.
2. Education indicators often include only enrolment rates, sometimes gross, sometimes net, sometimes both. But the meaning of such indicators is widely misunderstood. Gross enrolment ratio (GER) may, for example, measure little more than the fact that the system is retaining pupils overly long with consequent educational and financial inefficiency, and human demoralization. Even net enrolment ratio (NER) cannot measure attendance, retention, time on task or learning outcomes. Further quantitative and qualitative indicators are needed to give an accurate identikit of how effectively the system is functioning, if schooling and its success is to be effectively monitored and value for the money invested is to be provided.
3. The terms 'North' and 'South' in this text are used as a short-hand to describe the rich, industrialized countries, and those countries that are still in the process of economic development.
4. One attempt to provide nationally useful definitions in childhood is British Association for Community Child Health and Department of Health, *Disability in Childhood: Towards Nationally Useful Definitions*, London, Department of Health, 1994.
5. Geographical proximity of the school to the home of girl students has been shown to be a particularly potent factor in the enrolment and perseverance of girls in schools at all levels. See, for example, E. M. King and A. M. Hill, *Women's Education in Developing Countries: Barriers, Benefits and Policies*, Baltimore, John Hopkins University Press, 1993.
6. Although adult basic education may have gone 'out of fashion' in the past two decades in terms of donor support, there are now welcome signs of a reinvigorated interest for reasons of equity as well as for poverty reduction. See, for example, J. Lauglo, *Engaging with Adults (The Case for Increased Support to Adult Basic Education in sub-Saharan Africa)*, Washington D.C., The World Bank, 2001.
7. This is a central dimension of many donors' strategy of poverty reduction and a cornerstone of the World Bank's Comprehensive Development Framework (CDF). See, for example, J. D. Wolfensohn, *Coalitions for Change*, Washington D.C., The World Bank, 1999.
8. This is a particular problem for developing countries, where repetition and drop-out can increase cost to untenable levels and 'push out' those entitled to education. See, for example, the situation in Zimbabwe, M. Presuh, and O. P. Ndawi, 'Education for All – The Challenges for a Developing Country: The Zimbabwe Experience', *International Journal of Inclusive Education*, 1998, Vol. 2, No. 3, pp. 209–24.
9. The distinction between enrolment and regular attendance in developing countries varies but is probably not less than 10 per cent. The distinction between enrolment and retention is typically around 25 per cent or more, and the distinction between enrolment and *timely* completion is often not less than 50 per cent in many sub-Saharan countries.
10. This list is not exhaustive and it will be clear that the thinking of this text has been influenced by other official and non-official documents and publications, too numerous to list.
11. At the start of the new century, 9 per cent of boys and 14 per cent of girls who reached school age did not attend school. See World Bank, *World Development Report*, Washington D.C., 2000.
12. A similar pattern of progressive and cumulative regulation can be observed in England with Warnock Report of 1978 and legislation in 1981, 1988 and 1993, leading to the issue of a code of practice in 1994.
13. See, for example, OECD, *Integrating Students with Special Needs into Mainstream Schools*, Paris, OECD, 1995.
14. See UNESCO, *Legislation Pertaining to Special Needs Education*, Paris, UNESCO, 1996.
15. See, for example, the 'inclusionary' titled consultative Green Paper in United Kingdom: Department for Education and Employment, *Excellence for All Children: Meeting Special Educational Needs*, London, DFEE.
16. See, for example, Philippines, Department of Education, Culture and Sports, *Policies and Guidelines for Special Education*, Manila, Special Education Division, 1997.

17. See for example the summary of the Swiss case study in OECD, *Integrating Children with Special Needs into Mainstream Schools*, Paris, OECD, 1995, p. 220.
18. The World Bank estimates that while prices of Africa's primary products have been falling, those of rich countries have been rising. Developed countries' farm subsidies amount to US\$360 billion a year, i.e. US\$30 billion more than Africa's entire GDP. Moreover, the elimination of all trade barriers to imports from sub-Saharan Africa by Europe and Japan would raise the region's exports by about US\$2.5 billion. Quoted in *The Economist*, 17 February 2001.¹ 19. An interesting analysis of the tensions which have emerged in a number of industrialized countries, consequent on the shift in paradigm, not least between the interests of administrative and professional groups on the one hand and devolutionary and deprofessionalizing pressures inherent in inclusive education, is: A. Loxley, and G. Thomas, 'From Inclusive Policy to an Exclusive Real World: An International Review', *Disability and Society*, Vol. 12, No. 2, 1997, pp. 273–91.
20. From US\$32 per African in 1990 to US\$19 in 1998. Source: 'Africa's Elusive Dawn', *The Economist*, 17 February 2001.
21. For example, in the case of learners with profound and multiple learning difficulties, an enormous challenge for carers and educators, a particularly responsive environment and supplementary assistance from highly trained educators is needed. See J. Ware, *Creating a Responsive Environment for People with Profound and Multiple Learning Difficulties*, London, David Fulton, 1996.
22. This point is made in H. Savolainen et al., *Meeting Special and Diverse Needs: Making Inclusive Education a Reality*, Helsinki, Ministry for Foreign Affairs, 2000, pp. 135–6.
23. At the time of the report, some 12 per cent of children in the Folkeskole were receiving special educational support. J. Hansen, 'The development of the Danish Folkeskole, towards a school for all', *European Journal of Special Needs Education*, Vol. 7, No. 1, 1992, pp. 38–46.
24. Following a definition proposed originally by UNICEF, basic education is seen in this definition as the knowledge, values, attitudes, knowledge and skills that serve as the basic know-how kit for an individual's life and lifelong learning.
25. *The World Development Report 2000/2001* (World Bank, 2000) proposes three complementary areas for action to overcome poverty, including making state institutions more responsive to poor people and removing social barriers which exclude women, ethnic and racial groups, and the socially disadvantaged. See in particular Chapter Six.
26. The regular and punctual attendance of teachers is a major problem in a number of African countries, often linked to the fact that they are appointed as permanent civil servants with full tenure to the system and not to a particular school.
27. This was a necessity recognized a decade ago. See The World Bank, *Poverty: The World Development Report 1990*, Washington D.C., 1990, p. 143.
28. The World Bank reported that by the end of 1999 at least six African governments were pioneering sector wide approaches to education development. World Bank, *A Chance to Learn: Knowledge and Finance for Education in Africa*, Washington D.C., December 1999, p. 4.
29. This is one of the conclusions of the UNESCO Report to the Social Summit of 1995. See UNESCO (1995), *Overcoming Obstacles to the Integration of Disabled People*, Paris, UNESCO.
30. Adapted from Wolfensohn, 1999, p. 12.
31. A good example from South Africa of this phenomenon is P. Christie, 'Schools as (Dis)Organisations: The Breakdown of the Culture of Learning and Teaching in South African Schools', *Cambridge Journal of Education*, Vol. 28, No. 3, 1998, pp. 283–300.
32. In many countries of sub-Saharan Africa, the regular and timely attendance of teachers is a major problem. See, for example, The World Bank, *Education in Madagascar: Policy Directions for the Next Decade*, Washington D.C., 2001.
33. See, for example, S. Beazley, and M. Moore, *Deaf Children, their Families and Professionals. Dismantling Barriers*, London, David Fulton Publishers, 1995.
34. See S. Paranjpe, 'A community-based model of integration for primary education in India: a focus on SLD', *European Journal of Special Needs Education*, Vol. 9, No. 2, 1994, pp. 152–67.
35. For example, World Health Organization, *International Classification of Impairments, Disabilities and Handicaps: A Manual of Classification Relating to Disease*, Geneva, WHO, 1980.
36. See, for example, APEID, *Final Report of the Eighteenth APEID Regional Seminar on Special Education*, p. 27, Paris, UNESCO, 1998.

37. Some good examples of the complexity of the task are included in P. Evans, 'Integrating Students with Special Educational Needs into Mainstream Schools in OECD Countries', *Prospects*, Vol. 25, No. 2, 1995, pp. 201–18.
38. This is a point made in L. A. Brolin, *The Rights of Children with Disabilities: How is Progress Monitored*, Stockholm, Radda Barnen, 1996, p. 24.
39. See, for example, H. J. Walberg, 'Learning Disabilities Revisited', *European Journal of Special Needs Education*, Vol. 8, No. 3, 1993, pp. 289–302.
40. A study that found that opportunities for choice of programme for learners were more restricted in special schools for those with severe motor disabilities is E. H. Mattson, 'Adjusted School Environment for Students with Severe Motor Disabilities', *International Journal of Inclusive Education*, Vol. 2, No. 3, pp. 237–53.
41. An interesting study of integration in Switzerland found both positive learning and attitudinal results, but some alarming social ones. G. Bless, and C. Amrein, 'The Integration of Pupils with Learning Difficulties: The Results of Research into the Effects of Integration', *European Journal of Special Needs Education*, Vol. 7, No. 1, 1992, pp. 11–19.
42. See, for example, B. Wade, and M. Moore, *Experiencing Special Education: What Young People with Special Education Needs Can Tell Us*, Buckingham, Open University Press, 1993.
43. See, for example, the rise in the number of projects addressing American-style testing approaches. L. P. Larach, and M. E. Lockheed, *World Bank Lending for Educational Testing: A General Operational review*, Washington D.C., The World Bank, 1992 (PHREE Background Paper Series No. 92/62R).
44. For an overview of the various approaches to evaluation, see E. House, *Evaluating With Validity*, Beverley Hills, Calif., Sage Publications, 1980.
45. Absence of such built-in evaluation was a notable weakness in integration projects. OECD, *Integrating Students with Special Needs into Mainstream Schools*, Paris, OECD, 1995.
46. This point is made in the 1998 report of the Canadian Human Rights Commission. Canadian Human Rights Commission, *Annual Report 1998*, Ottawa, Minister of Public Works and Services, 1998, p. 22.
47. As late as 1995, a survey undertaken on behalf of UNESCO found that a substantial minority of countries had general legislation that was deemed not to apply to children with special educational needs and 65 per cent of responding countries had legislation that excluded at least some children. UNESCO, *Review of the Present Situation in Special Needs Education*. Paris, UNESCO, 1995.
48. A study in Scotland indicated such an imbalance. Riddell, et al., A Key Informant Approach to the Study of Local Policy-Making in the Field of Special Educational Needs, *European Journal of Special Needs Education*, 1992, Vol. 7, No. 1, pp. 47–62.
49. See Department of Education and Science and Welsh Office, *Discipline in Schools*, London, HMSO, 1989 (Report of the Committee of Enquiry on Discipline in Schools).
50. According to one author, this stricture applies to most ex-colonial countries in Europe. R. Hurst, 'Choice and Empowerment; Lessons from Europe', *Disability and Society*, 1995, Vol. 10, No. 4, pp. 529–34.
51. The annual report of the Canadian Human Rights Commission indicates that over one-third of complaints of discrimination were from disabled persons. Canadian Human Rights Commission, *Annual Report 1998*, Ottawa, Minister of Public Works and Services, 1998.
52. This is not likely to be the case for those children who are profoundly deaf, whose speech has failed to develop in a spontaneous manner because they have little or no residual hearing.
53. Those learners with minimal residual vision or who are totally blind will need to learn to read and write through the medium of Braille and may need separate provision.
54. See, however, L. J. Shulman, and G. Sykes, 'A National Board for Teaching: In Search of a Bold New Standard', paper prepared for the Task Force on Teaching as a Profession, Carnegie Forum on Education and the Economy, Stanford, Calif., Stanford University 1986; and P. L. Peterson, and M. A. Comeaux, Assessing the Teacher as a Reflective Professional: New Perspectives on Teacher Evaluation, in: E. Woolfolk, (ed.), *The Graduate Preparation of Teachers*, pp. 132–52, Englewood Cliffs, N.J., Prentice-Hall, 1989.
55. A summary of the legal framework is given in 'Expert Group Meeting on International Norms and Standards relating to Disability', Berkeley, Calif., 1998.

56. The basic principles of Jomtien have been extremely influential, namely : the development of a more 'child-centred' concept of primary education; the improvement of the quality of primary education, including through improvements in professional training; the provision of a more flexible and responsive primary schooling in its organization, processes and content; more shared community responsibility for the provision of primary education; recognition of the wide diversity of needs and patterns of development of primary school children, demanding a wider and more flexible range of appropriate responses; and, commitment to a developmental, intersectoral and holistic approach to the education and care of primary school children.
57. See for example the work of Caroline Hoxby at Harvard University. 'Does Competition among Public Schools benefit Students and Taxpayers?', *American Economic Review*, December 2000.
58. An interesting attempt to provide the information for such interlearning is the Special Issue of the *European Journal of Special Education*, Vol. 13, No. 1, March 1998.
59. I am obliged to a chapter by Peter Mittler for a number of ideas expressed here. See P. Mittler, Childhood Disability: A Global Challenge, in: P. Mittler et al., *World Yearbook of Education*, pp. 3–15, London, Kegan Paul, 1993.
60. See, for example, M. Johnson, Theory and practice of a TEMPUS Joint European Project, *European Journal of Special Needs Education*, 1996, Vol. 11, No. 3, pp. 243–55.
61. ADD, Healthlink Worldwide and DAA also publish regular journals for advocacy and information.
62. An interesting commentary on this tension in the United States is contained in a paper produced for the EFA review by E. B. Finke and B. O'Grady, *Education for All: A Global Commitment*, Washington D.C., Academy for Educational Development, 2000.
63. A book which reviews the historical and contemporary relationship between diversity and democratic civic culture is L. H. Fuchs, *The American Kaleidoscope. (Race, Ethnicity and the Civic Culture)*, Hannover, New Hampshire, Wesleyan/University Press of New England, 1990.
64. Early efforts at a parents' charter in England were extremely weak on parental participation. See, for example, The Department for Education, *Our Children's Education: The Updated Parents Charter*, London, DfE, 1994.
65. A recent treatment of the importance of the relation between this social trust and economic success is: F. Fukuyama, *Trust (The Social Virtues and the Creation of Prosperity)*, New York, The Free Press, 1995.
66. One example of this is the 'mother' and satellite school system, pioneered by UNICEF in Bangladesh, to encourage attendance of girl students.
67. In this connection, a whole series of child-friendly school projects has been conducted by UNICEF in conjunction with different national bodies. See, for example, UNICEF/Philippines, *Building Systems Support and Sustainability for the Child-Friendly School*, Manila, PPO Project, 1999.
68. See the 'factors' approach adopted in W. Heneveld, *Planning and Monitoring the Quality of Primary Education in sub-Saharan Africa*, Washington D.C., The World Bank, Technical Department, Africa Region, 1994.
69. I have used a similar formulation in a previous publication: J. Lynch, *Education for Citizenship*, London/New York, Cassell, 1989.
70. Details taken from the UNESCO Open File on Inclusive Education.

Some terms

Allergy – a common problem among school children, although the basic causes can remain mysterious. Eczema, asthma and migraine can have allergic connections. Teachers need to be aware of implications and impact of treatment, especially at times of stress such as examinations.

Aphasia – inability either to understand (receptive aphasia) or, in other cases, express properly (expressive aphasia); may be unconnected to physical or intellectual impairment.

Autism – an inability on the part of the child to read verbal or visual signals or both. Some autistic children can be very gifted in areas such as music, mechanics and mathematics. Not yet fully understood.

Cerebral palsy – a disorder of speech and posture due to the failure of or damage to a small part of the brain, which controls movement. Previously described as spastic.

Community participation – the active involvement of a community in the organization of their learning centre, including construction, repair, management and supervision.

Down's syndrome – a condition resulting from the child being born with an extra chromosome in each body cell (47 instead of 46). The condition varies and some children are capable of attaining a high level of achievement.

Disability – a barrier to participation of people with impairments or chronic illness, arising from an interaction of the impairment or illness with discriminatory attitudes, actions, cultures, structures, policies or institutional practices or processes.

EBD – children who are regarded as having emotional and behavioural difficulties. They are increasing in numbers in many Western societies and appear likely to be disaffected and excluded from education.

Educational Tribunal – agency as part of process for independent appeal by parents and learners against decisions, assessments and statements by education authorities.

Facial disfigurement – perhaps the most 'impactful' form of bodily disfigurement, which can include birth marks, scarring and malformed features. Requires particularly careful and sensitive teacher responses.

Gifted children – a term often used to describe learners who are exceptionally able or talented, and may thus require special or supplementary educational responses.

Hearing impairment – can range from those who are profoundly deaf to those whose hearing is temporarily impaired, as in the case of glue ear, due to a temporary blockage by wax or catarrh or some other cause. In the latter case, hearing loss can fluctuate. Two main types are conductive deafness, caused by an obstruction or abnormality in the outer or middle ear, and sensori-neural or nerve deafness caused by an abnormality of the inner ear or of the auditory nerve.

Impairment – a limitation of physical, intellectual or sensory function.

Inclusive cultures – the shared practices and values within a community that support and sustain the widening of membership of that community.

Learner – the term used in this report for children and young people eligible for primary and secondary education, who may or may not be in a school.

Learning centre – a place where learners are educated together, including schools and less formal arrangements.

Participation – the shared engagement in learning and other social activities with others that fosters common values and norms and a sense of belonging to the group.

Participatory consultation – the provision of a 'built-in' right to a voice or even to co-determination of decisions for those affected by those decisions.

Parental participation – the close involvement of parents in decisions about the assessment and allocation of their children and, if necessary in the preparation of an individual education programme.

Physical impairment – may range from permanent or protracted impairments, as a result of such conditions as congenital deformities, spina bifida, hydrocephalus, muscular dystrophy, cerebral palsy, brittle bones, haemophilia, cystic fibrosis, asthma to temporary or permanent conditions as a result of illness or accidental injury. May require mobility or seating aids.

School contract – a means whereby parents and the local community engage in a binding contract with the local and national education authorities for the provision of learning opportunities for their community.

School council – a group elected by the parents and local community to represent their interests in negotiations with the local and national education authorities for the preparation and implementation of a school contract.

Sensory impairments – visual and hearing impairments.

Travelling or nomadic children – children of families who often have a nomadic and variable lifestyle, sometimes with poor health and living conditions, are very often socially and educationally discriminated against in European society.

Visual impairment – one of the most frequent physical impairments in school with many varying degrees of defective sight, some relatively minor and remediable, others more profound and protracted, but all requiring differing educational responses. The most frequently encountered are likely to be hypermetropia, myopia, astigmatism and colour blindness, all of which have implications for teaching/learning strategies. Most such learners are in fact partially sighted and can function in the regular school with the assistance of low-vision aids.

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World Education Forum

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Education for All 2000 Assessment



This study reviews developments in the theory, policy and practice of inclusive education since the World Conference on Education for All (Jomtien, Thailand, 1990) and incorporates commissioned and collected material as well as texts produced for the World Education Forum. Written shortly after the Forum by James Lynch, it examines progress in the development of an inclusive concept of education, illustrating the efforts made by learners with impairments to overcome barriers of access to and full participation in education at all levels, especially in primary school. The practicalities involved in moving from separate provision – or no provision at all – to mainstreaming the majority of these pupils into the regular education system is assessed, particularly given the current capacity of many schools in the developing world. The study gives analysis and examples of instructive practice for decision- and policy-makers, whether national or in bilateral or multilateral organizations.

Inclusion in Education: The Participation of Disabled Learners is one of the thematic studies published by UNESCO for the International Consultative Forum on Education for All as part of the Education for All 2000 Assessment. This worldwide evaluation was undertaken towards the end of the decade following the World Conference on Education for All (Jomtien, Thailand, 1990) as preparation for the World Education Forum on education for all held in Dakar (Senegal) in April 2000.

The complete list of titles in the series is given below.

-  Achieving Education for All: Demographic Challenges
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-  Community Partnerships in Education: Dimensions, Variations and Implications
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-  Education in Crisis: The Impact and Lessons of the East Asian Financial Shock 1997–99
-  Education in Situations of Emergency and Crisis: Challenges for the New Century
-  Funding Agency Contributions to Education for All
-  Girls' Education
-  Inclusion in Education: The Participation of Disabled Learners
-  Literacy and Adult Education
-  Reason for Hope: The Support of NGOs to Education for All
-  School Health and Nutrition
-  Textbooks and Learning Materials 1990–99

Each thematic study aims to provide theoretical vision and practical guidance to education planners and decision-makers at national and international levels. In order to provide a global review, they draw upon and synthesize submissions from partner institutions and agencies in each of the EFA regions. They attempt to describe 'best practices' as well as successful and unsuccessful experiments in policy implementation.