



Rolf Werning / Alfredo J. Artiles /
Petra Engelbrecht / Myriam Hummel /
Marta Caballeros / Antje Rothe
(Eds.)

Keeping the Promise?

Contextualizing Inclusive Education
in Developing Countries

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Contents

Nidhi Singal
 Foreword..... 7

Introduction..... 9

Petra Engelbrecht and Alfredo J. Artiles
 1 Inclusive Education:
 Contextualizing the History of a Global Movement 15

2 Empirical Results from Malawi
Myriam Hummel, Petra Engelbrecht and Rolf Werning
 2.1 Developing an Understanding of Inclusive Education in Malawi 29

Antje Rothe, Evance Charlie and Anderson Chikumbutso Moyo
 2.2 Global Processes and Local Manifestations:
 Two Case Studies from Malawi..... 47

3 Empirical Results from Guatemala
*Cristina Perdomo, Marta Caballeros, Alfredo J. Artiles, Magaly Menéndez
 and Gerson Sontay*
 3.1 Developing an Understanding of Inclusive Education in Guatemala 93

Marta Caballeros, Alfredo J. Artiles, Héctor Canto and Cristina Perdomo
 3.2 Inclusive Education in Developing Countries:
 Two Case Studies from Guatemala 121

Myriam Hummel, Antje Rothe and Rolf Werning
 4 Theoretical Annotations of the Research Results from Guatemala
 and Malawi..... 151

*Antje Rothe, Marta Caballeros, Myriam Hummel, Petra Engelbrecht,
 Alfredo J. Artiles and Rolf Werning*
 5 Reflections on the Future of Inclusive Education..... 167

Short Biographies of the Authors and Editors..... 181

Foreword

Across the globe, inclusive education has been accorded high acceptability and is seen as the hallmark of service provision for all children, particularly those with disabilities. Nearly two decades since the Salamanca Statement, when inclusive education was proposed as being central to the development of an inclusive society, it has been endorsed by various international agencies and national governments.

Inclusive education in countries of the South, over the recent years, has become an ideal standard. It is argued to be a panacea for bringing about reforms in the broader education system, and has been promoted through arguments of human rights and economic viability. This book underlines the perennial significance of a critical, questioning approach towards inclusive education, particularly in developing contexts. It accents the merits in contextualizing the various debates and concerns in the current discourse.

Discussions in this book are sensitive to the consequences of inclusive education as a global travelling policy and practice. Indiscriminate policy transference has significant intended and unintended consequences, especially when the realities of educational governance, resourcing and broader socio-cultural dynamics are different.

Building on robust evidence from the field gathered in Guatemala and Malawi, the book challenges a monolithic understanding of inclusive education. Undertaking a nuanced multi-layered analysis of the education system, the authors vividly portray the diversity and complexity of local contexts in which international and national policies are enacted. A key strength of this book is its engagement with and critical analysis of diverse stakeholder perspectives. Based on perceptions gathered from government officials, school-based professionals and, most importantly, students and their parents, the deliberations in this book reflect a robust empirical examination of inclusive education in developing contexts. Such in-depth and systematic engagement with local realities is much needed in the current discourse on inclusive education.

The various authors note how the creation of inclusive schools must begin with engaging local stakeholders: Their histories and biographies, their view of situated needs and priorities, and their appreciation of the enabling and constraining influences on efforts towards making education systems more inclusive of diversity. Findings from the book remind us that inclusion is an on-going process involving reflexivity and negotiation. It is a process which is embedded in and shaped by unique existing material conditions, social relations, and interpersonal actions. Implementation is complex and success depends on the extent to which

the agency and capabilities of different stakeholders is harnessed, supported and optimized.

This book also provides support for a growing argument that inclusive education must be regarded as a series of continua rather than a single absolute with only one international configuration. Efforts towards inclusion of all children should be supported through a range of pedagogical and structural practices. It is not simply about up-skilling teachers, but also about providing support in terms of human and learning resources across different sectors.

Finally, this book makes an important contribution to upholding the value of plurality in discourses and acknowledges the range of possible responses to the complex questions posed by efforts towards inclusive education: Foreclosing debate and making diverse practices invisible does not always provide the most effective solutions. It reaffirms the vision of inclusion, whilst noting the real challenges (and opportunities) available in different national contexts. Fundamentally, it upholds the vision that education systems can shape the development of an inclusive society and support the participation of all children in the common enterprise of learning to become who they want to be. However, in order to do so, we need to be continually reflective of underlying tensions and ambiguities and, most importantly, to be open to re-envisioning inclusive education in ways that are respectful of local solutions, ethics and values.

Dr. Nidhi Singal
Senior Lecturer in Inclusive Education
University of Cambridge

Introduction

Education for All (EFA) has been high on the international agenda for decades. The World Declaration on Education for All was adopted at the World Conference on Education for All in Jomtien, Thailand in 1990. Ten years later, the commitment was reinforced and the six EFA goals, which are to be met by 2015, were set out at the World Education Forum in Dakar, Senegal in the year 2000. An extensive global monitoring process was implemented under the leadership of the United Nations Educational, Scientific and Cultural Organization (UNESCO). The Millennium Development Goals, ratified in 2000 and extending until 2015, also reinforce the EFA agenda, but with different emphasis (Miles & Singal, 2010). Another international movement for educational reform with separate roots dates back even further: Pressures to create inclusive educational systems in the so-called developed countries¹ can be traced back to the 1960s and 70s (Artiles, Kozleski, Dorn, & Christensen, 2006, p. 69). The most visible milestone in the emergence of inclusive education in policy and professional practice is the Salamanca Statement and Framework for Action on Special Needs Education from 1994, which was strengthened through the United Nations (UN) Convention on the Rights of Persons with Disabilities in 2006. The inclusive education movement is globally present, yet different conceptions of this notion still exist (Ainscow et al., 2006). Artiles and Dyson (2005) described inclusion as a ‘slippery concept’ that underlies an international movement, contributing to education policies of countries around the globe and being supported through international declarations and organizations. The lack of conceptual clarity complicates efforts to aggregate and synthesize the knowledge produced on this notion.

It is worth underscoring that the Education for All agenda was developed within the UN system and its organisations and tends to target developing countries, whereas the concept of inclusive education has emerged from reforms in educational systems in developed countries. The Dakar Framework for Action stresses that Education for All can only be achieved through inclusive education (UNESCO, 2000, p. 14). Therefore, the Education for All agenda transfers the concept of inclusive education (which is grounded in experiences from developed countries) to the goals and requirements of developing countries. Similarly, the Sustainable Developments Goals agreed upon by the UN in 2015 target all countries worldwide and include the goal of “inclusive and equitable quality education for all” (United Nations, 2015, p. 19). The direct transfer and application of experiences and knowledge generated in the contexts of developed nations

¹ For terminological considerations see chapter 1 of this publication.

to the rest of the developing world is problematic, particularly if such applications have not been adapted to local historical and cultural contexts (Singal & Muthukrishna, 2014).

Inclusive education makes many promises, such as the pledge to change attitudes and form the basis for a just and non-discriminatory society (UNESCO, 2009) benefitting all children (*ibid.*) and to be both cost-efficient and cost-effective (Peters, 2003). Again, these promises are derived from discourses and empirical studies in developed countries that did not take the realities in developing countries into account. Enormous financial, social, and educational barriers as well as colonial legacies perpetuate inequities in many parts of the developing world, posing serious challenges to keeping these promises.

The threefold purpose of this book is to:

1. Generate research evidence on the development and implementation of inclusive education in developing countries,
2. Contextualize inclusive education in specific developing countries and contexts, and
3. Reflect on the future of inclusive education in developing countries.

The research results reported here were based on the *Research for Inclusive Education in International Cooperation (refie)* project, which was implemented from December 2013 to February 2015 on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ) and Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH (GIZ). Leibniz Universität Hannover and GOPA Consultants headed the international team of researchers. The research was conducted in two countries—Guatemala and Malawi—by a team of national researchers in each participating country. The Guatemala team, headed by Marta Caballeros, included Héctor Canto, Magaly Menéndez, Cristina Perdomo, Gerson Sontay. The team was supported through Priscila Franco. The Malawian team included Anderson Chikumbutso Moyo, Evance Charlie, Grace Mwinimudzi Chiuye, Elizabeth Tikondwe Kamchedzera, Lizzie Chiwaula. The two country teams were coordinated and supported by Rolf Werning (Research Director), Myriam Hummel (Research Coordinator), Alfredo Artilles (Research Advisor), Petra Engelbrecht (Research Advisor), Antje Rothe (Researcher), Ursula Esser (Capacity Development Expert), Carolin Bothe-Tews (Communication and Knowledge Management Expert), Heike Happerschoss (Backstopper) and Margot Freimuth (Co-Backstopper).

The *refie* project aimed to advance our understanding of inclusive educational systems in what is regarded as developing countries in order to improve inclusive policies and practices in international development cooperation efforts. The overall guiding research questions were:

1. How is the concept of inclusive education constructed at different levels (macro, meso, micro) of the educational systems and from various perspectives (e.g., teachers, administrators, parents, children) in Guatemala and Malawi?
2. Which success factors and barriers influence the implementation of inclusive education in these countries?

The specific research questions were structured and based on the four dimensions of inclusive education identified by researchers such as Booth, Ainscow, Black-Hawkins, Vaughan, & Shaw (2000) and Kalambouka, Farrell, Dyson, & Kaplan (2005), as cited in Artiles, Kozleski, Dorn, & Christensen (2006). These dimensions are access, acceptance, participation and learning outcomes. Due to time and resource constraints, this research project focused on the first three of the four dimensions. By applying qualitative research methods, we examined stakeholder perspectives at the macro (national), meso (district) and micro (school/community) levels with a focus on primary education. The following data collection methods were applied:

- Document analysis of country-specific existing research results, policies and practice (Wolff, 2008);
- Focus group discussions (Lamnek, 1998) and problem-centred interviews (Witzel & Reiter, 2012) with experts from various stakeholders from the macro level;
- Problem-centred interviews with district education managers and representatives of relevant organizations in the districts where the case study schools were located;
- Instrumental case studies (Stake, 2005) at selected schools and their surrounding communities in each country, which included problem-centred interviews and focus group discussions with students, teachers, parents, school principals, local authorities, community members as well as participant observations.

In order to consolidate all the data and to keep the process of analysis transparent, comprehensible and controllable, consolidated analysis papers were developed on the basis of scientific source texts (Apel, Engler, Friebertshäuser, Fuhs, & Zinnecker, 1995; Friebertshäuser, 1992; Laging, 2008) for each of the ten case studies and on each country level. Transcripts of interviews, focus group discussions, observations and field notes were analysed using thematic coding according to Flick (1996; 2004) and open coding as described by Strauss (1994; Strauss & Corbin, 1996). Thematic coding was pre-structured by means of a code tree. The analysis was done with MAXQDA®. The study data base included about 245 transcripts of interviews, focus group discussions and field notes from both countries.

The book is organized in seven chapters. Chapter 1 contextualizes the history of the global movement of inclusive education. Beginning with an overview of the history of inclusive education and a brief discussion of the global debate on the implementation of inclusive education, it provides a critical review of themes in the international research literature on inclusive education while emphasizing research in developing countries. Moreover, it stresses that finding a broader and more fluid definition of inclusive education and finding ways to commit in complex contexts to locally situated inclusive school contexts is imperative for the successful implementation of inclusive education in developing countries.

Chapter 2 presents the main empirical results from the *refie* country study of Malawi in different sections with a specific focusing. Chapter 2.1 describes the socio-economic and cultural contexts of Malawi and gives an overview of the educational system, including teacher education and legal and policy frameworks regarding the implementation of inclusive education. It relates how Malawi appears to be moving and positioning itself between special needs education and inclusive education, torn between the idealism of policy and the reality of schools, and challenged by subsistence demands, traditional orientations and formal education.

Chapter 2.2 presents the results from two case study schools in Malawi. The findings centre around three themes: Special education and inclusive education, policy idealism and reality in schools, and traditional orientations and formal education. These themes form the underlying basis for the in-depth analysis, comparison and discussion of the two case study schools.

Chapter 3.1 provides background and contextual information about Guatemala, including a general overview of the educational system, and describes different stakeholder perspectives on inclusive education. The evidence suggests that in Guatemala, fulfilment of the promise of inclusive education depends on the achievement of other social and economic policy changes.

Chapter 3.2 describes the results of two school case studies in Guatemala and emphasizes three key ideas based on the evidence: 1) The ways in which the Guatemalan Education System has been working to offer education to all its citizens; 2) the understandings and/or interpretations of education and inclusive education among different stakeholders; and 3) the contributions of institutional agents to ensure the right to education.

Chapter 4 highlights specific aspects of the country-specific results. Using three different theoretical frameworks, it examines the evidence from both countries and uses it to discuss the implementation of inclusive education in developing countries. The authors describe paradoxes and tensions related to the implementation and recontextualization of inclusive education at different levels of the educational system as well as the related negative and positive pressures identified in this research.

Based on these research findings, we reflected on the future of inclusive education and pondered the question, *Is the promise being kept?* As a result, we derived three recommendations for future inclusive education research and practice in both developed and developing countries: 1) use situated models, 2) consider the importance of educational quality in the process of realizing inclusive education, 3) create positive pressure. We argue that in order to realize inclusive education, one must be aware of the complexities involved, respond to the need to be flexible, and use locally sensitive solutions.

We would like to thank those who contributed to the *refie* research project in various ways. All study participants made constructive contributions to helping us develop a deeper understanding of the context and people of Malawi and Guatemala and a deeper affinity with students and their quest for quality education within an inclusive education system. We are indebted to the participating parents, students, teachers, principals, community members, district officers, officials in various Ministries and other education system stakeholders in the two countries.

Sincerely,
The Editors

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Inclusive education became a global promise corroborated by international declarations such as the Salamanca Statement (1994) and the Incheon Declaration (2015). Most countries worldwide have committed to the goal of inclusive education, putting a lot of pressure on so-called developing countries.

Against this backdrop, the threefold purpose of this book is to:

1. Generate research evidence on the development and implementation of inclusive education in developing countries,
2. Contextualize inclusive education in specific developing countries and contexts, and
3. Reflect on the future of inclusive education in developing countries.

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Dr. Nidhi Singal, Senior Lecturer in Inclusive Education, University of Cambridge

The Editors

Rolf Werning is Professor of Education for Special Needs at Leibniz Universität Hannover, Germany.

Alfredo J. Artiles is Dean of the Graduate College and the Ryan C. Harris Professor of Special Education at Arizona State University, USA.

Petra Engelbrecht is Professor and Senior Research Fellow of Education Sciences at North-West University, Potchefstroom Campus, South Africa.

Myriam Hummel and **Antje Rothe** are Researchers and Lecturers at Leibniz Universität Hannover, Institute of Education for Special Needs, Germany.

Marta Caballeros is a Community Social Psychologist in Guatemala.

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