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Keeping the promise? Contextualizing inclusive education in developing countries

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Petra Engelbrecht / Myriam Hummel /
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(Eds.)

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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.

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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 Artiles (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 emphasising 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 education 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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Petra Engelbrecht and Alfredo J. Artiles [1]

1 Inclusive Education: Contextualizing the History of a Global Movement

This chapter begins with an overview of the history of inclusive education and a brief discussion of the global debate on the implementation of inclusive education, followed by a critical analysis of themes in the international research literature on inclusive education, with an emphasis on research in developing countries. We hope that these discussions will serve as a basis for reflection on inclusive education, its future in developing countries such as Malawi and Guatemala, and the contributions it can make in influencing the development of quality education programmes for children who have been traditionally marginalized in education. Importantly, we shall begin with some notes on the terminology, with specific reference to the terms 'inclusive education' and 'developed' and 'developing countries'. Our analysis focuses on learners with special educational needs and disabilities as this is the meaning currently stressed in the definition and practice of inclusive education. However, in a subsequent section of this chapter, we also question such a narrow conceptualization of this complex concept. We also question the traditional use of the labels 'developed' and 'developing' nations, as these are heavily contested terms in the social sciences. After all, there are situations where that which passed as development in one cultural context was imposed and promoted as 'the' best way for another context to develop. As stressed by several researchers (e.g., Asabere-Ameyaw, Mensah, Dei, & Raheen, 2014; Singal & Muthukrishna, 2014; Srivastava, de Boer, & Pijl, 2015), terminology like 'developed' and 'developing', 'North' and 'South' as well as 'Western' and 'non-Western' highlight the stark inequalities and cultural differences between these countries. These terms have been used as shorthand for the complex set of inequalities and dependencies between countries divided, not by geographical boundaries, but by fundamentally different socio-political histories. In particular, engagement with colonization results in various levels of economic inequality and cultural diversity. Indeed, most of the countries defined as 'developing' nations share the legacy of a colonial past (Mutua & Swadener, 2011). The fundamental economic inequality between the so-called 'developed' and 'developing' countries has resulted in inequalities in the

1 The second author acknowledges support from the Equity Alliance and Mary Lou Fulton Teachers College at Arizona State University.

standard of living, access to opportunities, available resources, and domination by 'developed' nations.

The decision to use the term 'developing country' in this chapter was made in deference to the recent classification of countries according to the Human Development Index (HDI) of the United Nations Development Programme (UNDP) (Srivastava et al., 2015). However, we do so in full acknowledgement of the emergence of a knowledge base reflective of these deeply embedded inequalities and structural imbalances. The chapters in this book therefore emphasise what Singal and Muthukrishna (2014) refer to as powerful 'enablers' within 'developing' contexts who have fostered the growth of education. These enablers can promote the development of a deeper appreciation of unique cultural-historical contexts and deepen our analysis of research findings on inclusive education.

1 History of Inclusive Education

As has been documented extensively elsewhere (e.g., by Engelbrecht & Green, 2007; Ferguson, 2008; Terzi, 2008; Waitoller & Artiles, 2013), the education of children with special educational needs has been undergoing significant changes in developed countries in the last 30 years. The historical legacy of separate educational provision for children with disabilities based on a medical model of 'disability' has gradually been challenged by different approaches and, more specifically, perspectives emphasising human rights have challenged the practices of blatant neglect and segregated institutions. This has led to a movement that progressively shifted educational provision from segregated educational placements towards educating children with disabilities and so-called 'special educational needs' within mainstream schools, as described by Terzi (2008) and others. In the beginning of the 1990s, this movement was called 'integration' as a collective term for all attempts to avoid segregated and isolated educational settings. It stresses that the actual location of children with special educational needs should be within mainstream classrooms—usually with additional professional support, elements of social contact between children, as well as curricular elements (Engelbrecht & Green, 2007; Terzi, 2008).

During this 'integration' phase, the vast majority of developed countries made substantive changes in their educational systems to accommodate children with disabilities and 'special educational needs' within mainstream classrooms and neighbourhood schools. However, the concept of inclusive education replaced the integration model in subsequent years. Two interrelated factors contributed to this change. First, professionals started to express concerns about the narrow interpretation of integration as simply the placement of children with disabilities in

mainstream schools, without attention to the quality of education provided. For example, special educational practices were often transferred to mainstream classrooms without making even small improvements in terms of the actual content and practice of education. Second, the social model of disability and its emphasis on the ways in which all forms of institutional and physical barriers to full participation in society should be removed, along with its strong emphasis on rights and opportunities for equal participation has increasingly influenced the move towards inclusion in education (Terzi, 2008).

By the mid-1990s, inclusive education was therefore included as part of the international education agenda. International policy documents such as the Salamanca Statement and Framework for Action (United Nations Educational, Scientific and Cultural Organization [UNESCO], 1994) sensitized the majority of developed countries to the need to develop inclusive schools where all children are welcomed and allowed to participate regardless of their physical, intellectual, social and linguistic differences. Hence, they played a major role in this regard, as aptly described by Geldenhuys and Wevers (2013), Engelbrecht and Green (2007), Ferguson (2008) and others. As Mitchell (2005) and Ferguson (2008) point out, it has become clear that inclusive education now transcends the traditionally narrow focus on special educational needs arising from disabilities to merge with ongoing reforms in education that include all potential forms of marginalization, including discrimination based on gender, poverty, sexual orientation and race/ethnicity.

The common denominators in the many definitions of inclusive education seem to be

1. the continuous process of recognizing and valuing human diversity within educational systems by providing opportunities for children with diverse educational needs to access education and
2. the acceptance of diverse educational needs and the provision of opportunities for all to participate meaningfully in learning opportunities in ordinary classrooms (Engelbrecht, Nel, Nel, & Tlale, 2015; Swart & Oswald, 2008).

This implies that inclusive education—as an international education agenda with an emphasis on access and participation—runs parallel to the objectives of Education for All (EFA) (Kozleski, Artiles, Fletcher, & Engelbrecht, 2009) and the Millennium Development Goals on Education (Singal, 2008).

In contrast to developed countries, where the initial move towards integration and inclusion was strongly influenced by "the progressively stronger influence exercised by disabled people's movements and by associations of parents of children with disabilities" (Terzi, 2008), other factors and actors played an important role in the move towards inclusive education in developing countries. Consequently,

there are differences in the pace of the development of inclusive education in developed and developing nations. International agreements have provided the impetus to launch inclusive educational practices for children with diverse educational needs in some developing countries, while non-governmental organizations have taken the lead in others (Srivastava et al., 2015). It is important to note that, in contrast with the USA, Western Europe and other 'developed' countries, most efforts toward inclusive education in almost all developing countries are no more than a decade old. Moreover, these developments have been fraught with tensions, false starts and, particularly, a lack of attention from the international research community.

In the next two sections, we outline the global debates on the implementation of inclusive education and research findings, with specific reference to developing countries.

2 Global Debates and Research on the Implementation of Inclusive Education

Definitions of inclusive education vary from country to country, and there is a growing recognition that interpretations of the concept are as varied and disparate as the diverse educational needs of the children that it addresses (Mitchell, 2005; Singal, 2008). Inclusion has been described as a "complex, multidimensional and problematic concept and one that resists a universally accepted definition" (Mitchell, 2005). In other words, it means different things in different systemic, socio-economic and cultural contexts (Artiles & Dyson, 2005). Discourses on inclusive education circulating in both developed and developing countries in the areas of policy, research and practice have been concerned with two broad themes, namely, the justification for and the implementation of inclusive education (Artiles & Kozleski, in press; Engelbrecht et al., 2015). However, differences in the rationale for inclusive education have resulted in certain crucial aspects of inclusion being constructed differently, not only across contexts, but also within different levels of a single education system. The consequence of this situation is that multiple reasons are offered to justify inclusive education in different contexts.

Underpinned by a rights perspective, the justification discourse is connected to the idea of creating an inclusive society with an emphasis on full participation and equal recognition of all people. This discourse has indeed shaped the political view of inclusive education in some countries. Thus, some countries have associated inclusive education with a broad equity agenda for all children who have traditionally been excluded from mainstream schools and, secondly, with the creation of inclusive classroom and school communities that nurture the qualities of

equity and care. South Africa, for example, does not promote the implementation of inclusive education as simply one more option for education but rather, after becoming a democracy in 1994, regards inclusive education as the educational strategy most likely to contribute to the creation of a democratic and just society (Engelbrecht, 2006).

In other countries, inclusive education has been defined in terms of access to mainstream classrooms for students with disabilities. This often results in a stronger emphasis on pragmatic educational issues related to the implementation of inclusive education as a process of increasing access and participation and decreasing exclusion from mainstream schools (Savolainen, Engelbrecht, Nel, & Malinen, 2012). Artiles and Kozleski (in press) as well as Ferguson (2008) and Savolainen et al. (2012) point out that the literature in developed countries, with specific reference to the United States and Western Europe, reveals research based on an implementation discourse focusing on new educational environments that require fundamental changes in educational practice. Research indicates that inclusive practice also varies widely from the very specific (e.g., including students with disabilities in mainstream schools by relocating specialist provision from special to mainstream schools) to a very broad notion of diversity without recourse to categorization. This results in questions about what constitutes good practice, what counts as evidence of good practice, and how it can become known (Florian & Black-Hawkins, 2011; Florian & Rouse, 2009).

A significant body of research in developed countries has aimed to delineate the characteristics of an inclusive school. According to Singal (2008), these characteristics include the need to frame a shared vision in a school, the need for schools to go through a process of self-analysis and evaluation, and the role of leadership in the school. Furthermore, teachers play a key role in determining the quality of the classroom environment. Various researchers have stressed this and the need to reconceptualize their roles and responsibilities (Florian & Rouse, 2009). This requires an emphasis on the 'how' of inclusive education practices, including issues such as how teachers understand the nature of knowledge, the child's role in learning, and the impact of initial as well as continuing professional development of teachers to implement inclusive education (Waitoller & Artiles, 2013). Discernible patterns in the research on inclusive education in developed countries include (Ainscow & Sandill, 2010; Artiles, Kozleski, Dorn, & Christensen, 2006; Waitoller & Artiles, 2013):

- "The development of inclusive practices, particularly on a wide, national basis, might best be achieved not by seeking an improbable *transformation* of schools, but by an *incremental enhancement* of the processes which make the existing dynamic productive in an inclusive sense" (Ainscow et al., 2004a, p. 16, emphases in original);

- Use of different views of learning in classroom- and school-based inclusive education research;
- Sociocultural and situated view of learning in school-based studies in which communities of teachers engage in ongoing analyses of their own practices;
- Tensions between the views of learning adopted in school-based research: Although many studies purportedly draw from a community of practice theoretical perspective, there are no clear or consistent framings of the notion of leaning, which tends to be defined as either changes in participation in practice or changes in problem-solving;
- Under-examination of the sociocultural view of learning, as linked to identity transformation;
- Preference of school-based research on inclusive education for a community-based unit of analysis, though studies alternate their foci between individual and community units of analysis;
- Tendency for classroom-based research to be grounded in cognitive and behavioural theories that rely on standardized academic and/or cognitive assessments;
- A major emphasis of classroom-based research has been student and teacher experiences in inclusive classrooms, including question such as: Is inclusion a good practice? Can general and special education teachers work together and, if so, how? How do teachers negotiate new roles? "In these studies, narrow views of learning are informed by narrowing research methods that fail to capitalize on the complex environment of classroom work. The problem in simplifying complex realities is that researchers risk engaging in essentialism that makes teachers the omniscient focus of all classroom activity and makes the role of learner passive and procedural" (Artiles et al., 2006, p. 95).
- Classroom-based research focusing on the impact of instructional approaches on learning content in classroom-based research, including the impact of interventions to promote the acquisition of knowledge or skills, generally in small group contexts (examples include strategy instruction and direct instruction); a sizable proportion of this work is based on experimental designs and, thus, offers insights about the impact of interventions under controlled conditions, albeit at the expense of understanding the contextual dimensions of learning;
- Tendency of professional development research on inclusive education to ignore student identity intersections (e.g., learners from racial minority backgrounds with learning disabilities from various socioeconomic strata);
- Fragmented conceptualization of inclusive education and teacher learning in professional development research for inclusive education, which interferes with the consolidation of a knowledge base on this topic;
- Lack of conformity between inclusive education theory and practice/research since the most widely used definition tends to be restricted to learners with disabilities. Conceptual consensus is needed to guide research and practice;

- Lack of attention to the role and influence of globalization forces in schools and student lives in inclusive education research.

One literature review analysed 68 inclusive education projects in developing countries, including countries with a medium (e.g., Botswana, Indonesia and India) and low (e.g., Malawi, Sierra Leone and Zambia) HDI score, as defined by the United Nations Development Programme. The authors, Srivastava et al. (2015), stressed that, in contrast to the plethora of research on the implementation of inclusive education in developed countries, the general lack of research on inclusive education is a cause of concerns regarding the status of research in these countries. Taking into account that the incomparable political, economic, social and cultural identities of each country are the only parameters by which they are grouped on the HDI, it is positive to note that the focus on children with disabilities has become more visible in educational policies and legislation in these countries. Furthermore, there are similar findings on factors contributing to inclusive schools (although limited in number) in developing countries (Engelbrecht, Oswald, & Forlin, 2006; Singal, 2008; Skovdal & Campbell, 2015; Swart & Oswald, 2008). Some of the themes identified in these research projects will be discussed in the next section.

3 Main Themes from Research on Inclusive Education in Developing Countries

Singal and Muthukrishna (2014) stress the slowly emerging criticism of the hegemony of developed countries in constructing disability and the proposed global responses to associated issues such as inclusive education. It is therefore important to acknowledge the need to reconstruct and re-vision inclusive education in developing countries by acknowledging the need for a locally situated inclusive education approach that draws on the strengths of local communities while making informed decisions based on conceptualizations of inclusive education from developed countries. It also needs to be noted that, although much of the research cited in this section was undertaken by researchers from developed countries, the research with specific reference to South Africa and India referred to in the following sections was undertaken by researchers in these countries.

3.1 Role of External Factors Including Legislation/Policy Development and the Role of International Organizations/NGOs

As discussed earlier, the implementation of inclusive education is an internationally voiced policy ideal and, in the majority of developed countries, this often

refers to the inclusion of students with disabilities. The findings of researchers such as Srivastava et al. (2015) indicate a different pace in policy developments in regions such as Africa, Asia and Southeast Asia. While some countries are now revising their policies based on international statements, others are at the stage of formulating policies, and yet other nations have already revised their policies and initiated the implementation of inclusive education. In most instances, these revisions focus on students with disabilities with a strong emphasis on a deficit approach to diverse educational needs. However, it needs to be noted that in developing countries characterized by fundamental economic inequalities, the definition of who should be included and supported should also extend to the unique contextual factors that impact students' educational needs. This includes, for example, students living in families affected by poverty, disease and other forms of social deprivation. Generally, few developing countries have policies reflecting a wider view about the question of who has been traditionally marginalized in education. There is, therefore, a lack of clarity in new legislation in a number of developing countries regarding who marginalized students are, how marginalized students should be defined, and what the objectives of inclusive education should be (Engelbrecht, Nel, Smit, & Van Deventer, in press; Singal, 2010).

In many instances, developing countries expect non-governmental organizations (NGOs) to take the lead (Srivastava et al., 2015; United Nations Children's Emergency Fund [UNICEF], 2009). The role of external international organizations such as the United Nations has therefore steadily grown in importance in certain developing countries where these organizations have increasingly tried to support the development of policies and bridge the gap between new policies and the realities in schools. However, there is insufficient empirical evidence on the effects of projects implemented by international organizations and NGOs, and, disappointingly, the role of governments in some countries has been limited to the formulation of policy and not in the development of strategies to implement inclusive education in their own unique contexts (Srivastava et al., 2015).

3.2 Constructions of Disability in Developing Countries

A common challenge highlighted in research on disability and inclusive education in developing countries is related to issues around the identification of people with disabilities and the lack of reliable estimates of children with disabilities in schools (Singal, 2010). Assumptions that underpin people's understandings of disability and the role of diverse sociocultural and political discourses in country-specific contexts are often overlooked when external funding organizations estimate the number of people with disabilities in developing countries.

According to Grech (2011), the debate about the construction of disabilities in developing countries has produced a discernible pattern of homogenization, simplification and generalization achieved by the alignment of the assumed disability

experience in developing countries with the individualistic approach proposed in developed countries. Research in developing countries points out that the uncritical transfer of the construction of disability in individualistic term to societies that are arranged differently, and where many continue to operate in traditional, agrarian and collective ways, complicates the construction of disability and inclusive education in these countries. Engaging with the nuances of the specific contexts of people with disabilities is necessary, as it is within these contexts that the meaning of disability as well as the education of children with disabilities is negotiated (Grech, 2011; Singal & Muthukrishna, 2014). Scholars have called for critical reflection, for example, on the linkages between poverty and disability and on how disability and inclusive education should be conceptualized in developing countries, where inequalities and lack of access to basic opportunities are rampant, where a range of intersecting factors such as a family's social status and socio-economic position in the local community and the educational needs of children with disabilities are deeply intertwined and can result in different educational experiences and opportunities (Grech, 2011; Mutua & Swadener, 2011; Singal, 2010; Singal & Muthukrishna, 2014).

3.3 Role of Schools and School Communities in Supporting Children with Diverse Educational Needs

There is increasing recognition among researchers in both developed and developing countries that change initiatives related to the implementation of inclusive education should be located closer to the classroom, and that schools play a major role in this regard (Oswald & Engelbrecht, 2013). UNICEF (2009), for instance, recognizes the potential for schools to transform and nurture more inclusive education and support practices and has developed a 'child-friendly schools' model to promote adequately resourced schools and classrooms in developing countries. Although research in schools in developing countries has identified positive aspects (e.g., goodwill of local school communities), it has also identified challenges that should be taken into account when the roles of schools in the implementation of inclusive education are discussed in the contexts of developing countries:

Human and Technical Resources: Fundamental economic inequalities in developing countries affect the availability of both human and technical resources, including the availability of well-prepared teachers and classroom learning and teaching resources. Jones and Samuels (2015) found that school structures in Palestine, for example, do not match the needs of children with physical disabilities, and that teachers are overstretched and underprepared. Similar sets of findings were found in other research projects, e.g., in Guatemala, South Africa, Zimbabwe and India (Artiles, Mo, & Caballeros, 2015; Badat & Sayed, 2014; Campbell, Scott, Nhamo, Nyamukapa, Madanhire, & Skovdal, 2013; Engelbrecht, et al., in press,

Engelbrecht, et al., 2015; Singal, 2010). As teacher education programmes still focus on a medical approach to diverse learning needs and a teacher-centred model of teaching and learning, the result is that teachers still do not have the skills and knowledge needed to develop inclusive education practices (Engelbrecht et al., 2015; Singal, 2008). Furthermore, classrooms tend to be overcrowded and teachers' workloads unmanageable (Srivastava et al., 2013).

Leadership in Schools: Although information regarding the role of leadership in schools in developing countries is rather difficult to find, the following findings should be noted. One relatively long-term project investigated the implementation of inclusive education in two rural and disadvantaged schools in South Africa. The authors, Oswald & Engelbrecht (2013), analysed the leadership styles of the two school principals and found that power, when invested in a position in this developing country, permeates and moulds activities in a school system. Despite the fact that South Africa is a democratic state and there are policies supporting inclusive education, the individual role of the principal in either reproducing institutional roles accepted under a previous government or redesigning leadership in recognition of more democratic policies is apparent. This influences the strength of individual institutions to enforce basic rights in the implementation of inclusive education.

Advancement of Children's Rights: Even though the worldwide Conventions on Children's Rights have been supported by most developing countries, little is known about the actual advancement of children's rights in the developing world. The findings of a study by Pillay (2014) on the advancement of children's rights in Africa showed inadequate involvement of schools in the promotion of children's rights. The fact that local governments were poor role models in promoting the advancement of children's rights and financial constraints played a major role in this regard.

Dependence on a Medical Model in the Implementation of Inclusive Education: The strategies used to implement inclusive education vary between partial inclusion, separate placements in special classrooms, and other strategies. In a few instances, children with disabilities have been included in mainstream classrooms in schools where there are positive attitudes and goodwill towards students with diverse education needs (Engelbrecht et al., 2015; Engelbrecht et al., in press; Ngcoba & Muthukrishna, 2011; Singal, 2010). The teaching and support activities in most schools in developing countries are still rooted in a deficit view. Various studies have indicated that strategies to implement inclusive education are based on the assumption that learners with various types of learning difficulties and disabilities are qualitatively different and therefore require educational responses that are

uniquely tailored to their needs. This strong belief in a deficit view, which was entrenched in initial teacher education programmes, has led most general education classroom teachers to believe that they do not have the skills to support diverse learning needs (Engelbrecht et al., in press; Singal, 2008; Singal, 2010; Srivastava et al., 2015; Swart & Oswald, 2008).

Role of the Wider School Community: Little attention has been given to the role of communities in the implementation of inclusive education in developing nations. The pervasive inequitable socioeconomic and structural conditions of these societies constrain the roles of communities. Fletcher and Artiles (2005) discussed how social inequality converts into educational inequality for poverty-stricken communities in Latin America:

- "limited access to various education levels (pre-school, secondary and higher education);
- differential access to a quality education (e.g., lower teacher quality, fewer resources, lower quality curricula);
- social segregation of students (which limits access to social capital and is associated with fewer resources);
- limited parents' resources and contributions to the education of their children; and
- failure to infuse a social justice agenda in schools' work, which contributes to the role of reproducing inequality currently played by schools" (p. 209).

They argue that these processes are observed across other regions of the developing world. Despite these structural barriers, however, communities can play a substantial role in the advancement of inclusive education in developing nations. Researchers have shown, for instance, that communities in Guatemala produce 'spontaneous solutions' to community problems and challenges that include enhancing inclusive educational opportunities; some of these efforts include collaboration of community members and professionals from various sectors (Artiles et al., 2015; see chapter 2 on Malawi and chapter 3 on Guatemala in this volume).

4 Conclusions

As discussed in this chapter, debates on inclusive education in developed countries have shaped the way in which developing countries have interpreted access, acceptance and participation of children with special educational needs in mainstream schools. Furthermore, the financial support of international donor organizations has contributed to the often naïve transfer of knowledge in developed

countries, characterized by the implementation of inclusive education with an emphasis on disabilities without taking the realities of school communities in remote rural parts of many developing countries into account. Research in developing countries indicates that any strengths on contextual levels that can contribute to re-visioning the way in which inclusive education is viewed in these complex and diverse contexts generally are not acknowledged. Therefore, it is imperative to develop a broader and more fluid definition of inclusive education and to find ways to commit to locally situated inclusive school practices in complex contexts in this time of globally increasing diversity and diminishing economic resources.

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2.1 Developing an Understanding of Inclusive Education in Malawi

The intent of this chapter is to present key empirical results of the *refie* country study of Malawi. This section starts with a brief overview of the country-specific context and educational system. A dichotomous portrayal of our research findings is then presented in section 3 of this chapter. Conclusions were drawn by analysing problem-centred interviews (Witzel & Reiter, 2012) and focus group discussions (Lamnek, 1998) with educational stakeholders at the national/macro level (such as government officials, representatives of civil society and the international donor community), district/meso level (government officials), and community/micro level (such as students, parents, teachers, head teachers and other significant adults from the communities). Additional information obtained by analysing the main education policy documents of the Malawian government (Wolff, 2008) rounds out the chapter.

Malawi is a landlocked country in south-eastern Africa. In terms of population and area, Malawi is small compared to its neighbours Zambia, Tanzania, and Mozambique. The area now known as Malawi was formally annexed by Britain in 1883 through a representative of the British government. In 1964, Malawi gained independence from the British crown through mainly peaceful measures. Between independence and 1994, Malawi was a single-party state under president Hastings Banda. The year 1994 marked the transition to a multi-party system with parliamentary and presidential elections every 5 years (Dickovick, 2014).

1 Malawi's Socio-Economic and Cultural Contexts

In 2014, Malawi had a gross domestic product per capita of US$ 272.16 (Trading Economics, n.d.), placing it among the world's least developed countries. It ranked 174 out of 187 countries on the 2014 Human Development Index (HDI) (United Nations Development Programme [UNDP], n.d.). With a largely rural population, its economy is based mainly on agriculture. Poverty in Malawi is reflected in low life expectancy (54.7 years in 2012) and high infant mortality (48.01 per 100,000 live births) (index mundi, n.d.). Around 47 % of children under the age of 5 were suffering from moderately or severely stunted growth

between 2005 and 2012 (United Nations Educational, Scientific and Cultural Organization [UNESCO], 2014, p. 330).

As in the rest of sub-Saharan Africa, HIV/AIDS is prevalent in Malawi: Approximately 10.8 % the country's adults aged between 15 and 49 years have been diagnosed as HIV/AIDS-positive (Central Intelligence Agency, n.d.). Malawi currently has a population of 13.1 million (Malawi National Statistics Office, 2008, p. 3), which is growing rapidly. In the past 40 years, the population increased from 4 million in 1966 to 13.1 million in 2008. Malawi's population is comprised of various ethnic groups, which speak at least nine different home languages (Dickovick, 2014, p. 292). Currently, the average woman in Malawi gives birth to 5.7 children. Therefore, further significant population growth is expected in future, with estimates of around 26 million inhabitants by 2030 (Population Reference Bureau, 2012, p. 1). Malawi's population is very young: 22 % are under five years of age, and the average age of the population is 17 years (National Statistical Office, 2008, p. 12).

Fifty-nine per cent of women and 69 per cent of men in Malawi are functionally literate (ibid., p. 14). Economic interdependence and traditional cultural values and beliefs in local communities have an impact on the relevance of literacy and the percentage of people who are functionally literate in Malawi. Chimombo (2005), for example, refers to 'Mwambo'—ritually transmitted knowledge that defines the principal social categories of age, gender and rank in each community—as a factor that influences people's perceptions of the value of formal education and of who should be in school.

Due to the low life expectancy of Malawians, 12.4 % of persons under 18 years are orphans (National Statistical Office, 2008, p. 15). Based on the applied definition of disability (difficulties in one or more of the following areas: Seeing, hearing, speaking and walking/climbing), there are officially around 498,000 persons with disabilities in Malawi, which is equivalent to around 4 % of the total population. The majority of persons with disabilities live in rural areas (453,000 persons) (ibid., p. 16).

2 The Malawi Education System

The formal education system in Malawi follows an 8–4–4 structure. In other words, a full cycle of primary education takes 8 years, a full cycle in secondary education lasts 4 years, and tertiary education also lasts 4 years. Early childhood development and adult basic education are considered non-formal education and are under the administration of the Ministry of Gender, Children and Disability Affairs. Primary, secondary and tertiary schools comprise the formal education

sector, which is under the auspices of the Ministry of Education, Science and Technology (MoEST).

Children in Malawi are supposed to start primary school at the age of six. The language of instruction in the first four years of school is Chichewa, and then changes to English for the rest of the education programme. Students at state-controlled primary schools have not been required to pay school fees since 1994. At the end of eight years of primary education, students take the Primary School Leaving Certificate Examination (PSLE), which determines their eligibility for secondary education.

After two years of secondary education, students take the national Malawi Junior Certificate Examination (JCE). The full cycle of secondary education is completed after four years, and students then take the Malawi School Certificate of Education (MSCE) examination, which determines their eligibility to continue studying at the tertiary level.

Tertiary education is provided by several educational institutions. Access to tertiary education at government schools is competitive because places are limited. Besides the governmentally run University of Malawi, private universities, teacher training colleges, and other technical training institutions are mandated by law to facilitate professional training in Malawi. An MSCE certificate is required for enrolment at university colleges, teacher training colleges and technical training institutions.

2.1 Legal and Policy Framework

The Republic of Malawi has signed and ratified major international conventions on education. For example, it signed the UN Convention on the Rights of the Child (UN CRC) (United Nations Treaty Collections, n.d.), which proclaims the right to education for all children (Article 28) in 1991. Furthermore, Malawi signed and ratified the UN Convention on the Rights of Persons with Disabilities (UN CRPD) in 2007 and 2009, respectively (United Nations, n.d.).

The Constitution of Malawi stipulates several principles of national policy. Some of the main principles focus on non-discrimination and gender equality (Section 13). The Constitution declares that all persons are entitled to education, that primary education shall cover at least five years (Section 25), and that primary education is compulsory and free (Section 13).

The Disability Act (2012), which replaced the Handicapped Persons Act of 1971, incorporates many of the principles and obligations stated in the UN CRPD. The Disability Act is based on a human rights perspective on disability and focuses specifically on environmental barriers. In Article 10, the Malawi government vowed to recognize "the rights of persons with disabilities to education on the basis of equal opportunity, and ensure an inclusive education system and lifelong learning by (a) ensuring that persons with disabilities are not excluded from the

general education system at all levels and have access to quality primary education" (Malawi Government, 2012, p. 7).

In the National Policy on Orphans and Other Vulnerable Children, the Malawian government draws a close connection between the situation of orphans and vulnerable children and the HIV/AIDS pandemic, which has changed the shape of society in sub-Saharan Africa (Mwoma & Pillay, 2015). Malawi's national policy emphasizes the role of community-based childcare centres in providing care and support to orphans and other vulnerable children (Republic of Malawi, 2003, p. 9). Poverty is named as a major reason for orphans and other vulnerable children to drop out of school.

The overall policy goal of the 2008 Gender Policy is to "mainstream gender in the national development process to enhance participation of women and men, girls and boys for sustainable and equitable development for poverty eradication" (Republic of Malawi 2008, p. iii). In the policy areas linked to education, the stated objectives are to "increase access to quality education to all school age children at (early childhood) primary, secondary and tertiary levels" (ibid., p. 6) and to "reduce dropout rates of girls and boys at all levels of education" (ibid., p. 7). Several strategies were devised to support these aims.

The key document for policy development in the education sector in Malawi is currently the National Education Sector Plan (NESP) 2008-2017, which is anchored in the overarching policy context of the Malawi Growth Development Strategy (MGDS). The NESP is committed to Education for All (EFA) and the Millennium Development Goals (MDGs). The three thematic areas of intervention named in the NESP are access and equity, quality and relevance, and governance and management.

The Education Sector Implementation Plan (ESIP) was designed in 2009 to cover the first five years of the NESP and operationalize its objectives. To increase the enrolment of 'special needs learners' in the education programme, the ESIP contains provisions on special needs teaching and learning material for learners with disabilities. For students with hearing and visual impairments, for example, this includes things such as Braille materials and assistive devices as well as the establishment and rehabilitation of resource centres as activities to be implemented (Ministry of Education, 2009a, p. 55). Measures listed in the ESIP for implementation of the 'Undertake Inclusive Education in the Mainstream Schools' strategy include the provision of grants for special needs learners, finalization of a Malawi sign language dictionary, and the dissemination of guidelines for SNE implementation (ibid.). ESIP II, which was published in 2014 and covers the period until 2017/18, describes 'special needs' as a cross-cutting issue. An inclusive education strategy is to be formulated and introduced as part of ESIP II implementation (MoEST, 2014, p. 60).

The 2007 National Policy on Special Needs Education and the respective Implementation Guidelines from 2009 provide several definitions. For example, inclusive education is defined as "a learning environment that provides access, accommodates and supports all learners" (Ministry of Education, 2009b, p. vi; Ministry of Education and Vocational Training, 2007, p. 6). These policy documents name financial and personnel constraints, environmental and attitudinal barriers, insufficient coordination among stakeholders, and inadequate curriculum and institutional structures as the main challenges to implementing the policy (ibid., pp. 14-15).

The policy framework embedding the National Strategy for Teacher Education and Development (NSTED) is the current overarching policy of the Ministry's National Education Sector Plan (NESP). Therefore, the NSTED has the same structure and the same priority areas, namely, access and equity, quality and relevance and governance and management. In general terms, the NSTED Implementation Strategy defines the acute shortage of teachers and the resulting large number of untrained and under-qualified teachers as a major challenge to teacher education and development (MoEST, 2011, p. 6). Therefore, the Ministry of Education, Science and Technology has tended to focus more on increasing the supply of teachers than on improving the quality of teachers who are already at schools.

The first coherent national Early Childhood Development policy in Malawi was developed in 2003 with the aim of providing guidelines and coordination for Early Childhood Development (ECD) activities (Ministry of Gender, Youth and Community Services, 2003, p. 6). The National Policy on Early Childhood Development is closely orientated towards the United Nations Convention on the Rights of the Child (CRC). ECD programmes in Malawi target children from 0 to 8 years of age (ibid, p. 12). The understanding of early childhood development in Malawi is based on a multi-sectoral, multi-dimensional concept of ECD (Ministry of Gender, Children and Community Development & United Nations Children's Emergency Fund [UNICEF], 2009, p. 6).

2.2 Vulnerable Groups

The Malawian government defines the term 'vulnerable child' in the National Policy on Orphans and Other Vulnerable Children (Republic of Malawi, 2003) as a

> child who has no able parents or guardians, staying alone or with elderly grandparents or lives in a sibling headed household or has no fixed place of abode and lacks access to health care, material and psychological care, education and has no shelter (ibid., p. 8).

In the National Policy on Special Needs Education, students with 'special educational needs' are defined as

> Learners who require special service provision and support in order to access education and maximise the learning process. Learners with special educational needs as defined in this document refer to those children who fall into any of the following categories: sensory impairment which covers vision, hearing, deaf-blind; cognitive difficulties which include intellectual, specific disabilities and gifted and talented; socio- emotional and behavioural difficulties which includes autism, hyperactivity and other vulnerable children; physical and health impairments which include spina bifida, hydrocephalus, asthma and epilepsy. (Ministry of Education and Vocational Training, 2007, p. 6)

However, when it comes to strategies proposed for the specific groups of children named in the policy documents, the implemented measures to support learners with 'special education needs' mainly target children with sensory and motor impairments through the use of sign language, Braille material and assistive devices (Ministry of Education, 2009b, p. 8). The Ministry estimated that there are around 90,000 students with 'special learning needs' in primary education (MoEST, 2013, p. 48), and 3,400 students with special learning needs in secondary education (ibid., p. 78). The following categories were formulated for special learning needs: Low vision, blind, hard of hearing, deaf, physical impairment, and learning difficulties (ibid., p. 48 and p. 78).

The Malawian government acknowledges clear gender discrimination against girls in the education system (MoEST, 2014, p. 44). Enrolment of girls is almost at parity in primary school, but during the later stages of formal education, significant numbers of students drop out of school, and girls are more affected than boys (ibid., pp. 44-45).

As in the rest of sub-Saharan Africa, the school dropout rate is a major issue. In Malawi, only 31 % of students enrolled in the first year of primary school (Standard 1) stay in school until Standard 8 (MoEST, 2013, p. 21). What is more, the percentage of students continuing primary school until Standard 5 or 8 has continually declined since 2008.

Both direct and indirect economic causes are regarded as the main reasons for primary school dropout. According to the Ministry of Education, Science and Technology, family responsibilities obliging children to take on economic and other responsibilities affect boys and girls equally. Other reasons identified are the long distances between home and school and cultural values regarding the importance of education. The latter reason for school dropout almost exclusively affects girls in Malawi, who tend to get married at a young age (ibid., p. 38). As secondary schools are not free, school fees are another main reason for high dropout rates. Other major factors that lead to dropout at secondary level are marriage and pregnancy (ibid., p. 75).

2.3 Heterogeneity

Primary school classes in Malawi are highly heterogeneous. For example, there is great age heterogeneity due to the fact that some learners, especially in rural areas, enter the primary school system at a later age, mainly because of family circumstances. According to the Ministry of Education, Science and Technology, children aged 4 to 17 years old were enrolled in Standard 1 in the 2012/2013 school year (MoEST, 2013, p. 36). Age heterogeneity is also an important factor in secondary education. In 2012/2013, the age of students enrolled in the first year of secondary school (Form 1) ranged from 11 to 26 years (ibid., p. 72).

According to the Ministry, there are around 90,000 students with special learning needs, which are divided into the following categories: Low vision, blind, hard of hearing, deaf, physical impairment, and learning difficulties (MoEST, 2013, p. 48).

As mentioned earlier, Malawian society is comprised of various ethnic groups. Besides English and Chichewa, around eight other local languages are spoken in the country (Dickovick, 2014, p. 292). The government of Malawi just recently reinforced its commitment to use Chichewa as the language of instruction in the first four years of primary school (Standards 1 to 4), and then switch to English as the language of instruction in all subsequent years (MoEST, 2014. p. 60). Given the heterogeneity of languages spoken in Malawi Dickovick (2014), it is surprising that no other languages besides Chichewa and English are considered as official languages of instruction, especially in the lower grades. The latest Education Management Information System (EMIS) data from Malawi includes no mention of language—neither language of instruction nor home language of students and teachers (MoEST, 2013).

2.4 Resources

Most schools in Malawi are affected by a lack of resources. Consequently, some schools do not have enough classrooms, resulting in either overcrowded classrooms or lessons being conducted outside ('teaching under trees'). Few schools have resource rooms for learners with special needs. In 2013, there were only 131 resource rooms among all primary schools in the country; thus, only 2 % of primary schools in Malawi have a resource room (MoEST, 2013, p. 28 and p. 51). Likewise, only 70 secondary schools have a resource room, corresponding to 6 % of Malawi's secondary schools (ibid., p. 64 and p. 81).

Malawi has no governmentally run special schools. However, there are eight privately run special schools for learners with disabilities: Three for the blind and five for the deaf; all eight have boarding facilities. The annual Education Management Information System reports do not include data on special schools.

2.5 Transitions

In Malawi, early childhood development programmes go back to the 1950s and were first developed as preschool institutions in urban areas. Established in the early 1990s in response to severe child malnutrition, Community-Based Childcare Centres (CBCCs) now form a major part of the ECD system in Malawi (Ministry of Gender, Children and Community Development & UNICEF, 2009, p. 5 and p. 11). According to government statistics, the percentage of children registered in ECD centres increased from 1 % in 1996 to 30 % in 2008 (ibid., p. 6). At the end of primary school, students take the Primary School Leaving Certificate Examination (PSLE). Only around one-third of students graduating from the eighth year of primary school (Standard 8) advance to Form 1 of secondary school (MoEST, 2013, p. 24). One major reason for the low secondary school enrolment rate might be that, unlike primary education, secondary education is not free. Students in Malawi must pay tuition fees to attend secondary school.

2.6 Teacher Education

Primary school teachers in Malawi are trained at teacher training colleges. Malawi has eleven teacher training colleges: Six are run by the government and five by religious or other non-governmental institutions.

Primary teacher training is offered in two formats: Initial Primary Teacher Education (IPTE) and Open and Distance Learning (ODL). IPTE is the conventional two-year full-time programme. After studying the first year at a teacher training college, student teachers spend the second year at a school for teaching practice under a mentor teacher. The ODL format offers students the possibility to take courses in blocks at a teacher training college, and takes a total of three years to complete.

Specialized training for special needs teachers is conducted at Montfort Special Needs Education College near Blantyre. The college currently offers special needs education diplomas with a specific emphasis on disabilities in three areas of specialization: Learning difficulties, hearing impairment and visual impairment. A fourth area (deaf-blind) was recently added. The core mission of the college is to train specialist teachers, conduct research in emerging issues in education (inclusive education, curriculum reforms, sign language, etc.), to produce books in Braille for visually impaired students, and to provide audiological services (hearing tests and hearing aids). Furthermore, it acts as a resource centre for information on special needs and inclusive education (Montfort Special Needs Education College, n.d.). Three years of work experience as a teacher is required to be eligible for studies at Montfort College. It takes three years for student teachers to complete the diploma programme. The course cycle is started once every three years with a capacity for 100 teacher students. No data could be accessed on how many teacher students complete the programme successfully.

3 Central Research Findings

3.1 Malawi Between Special Needs Education and Inclusive Education

As mentioned in chapter 1, the development of education in developing countries tends to reflect the export of concepts from developed countries to developing countries. Whereas the global push to implement inclusive education systems has influenced recent policy documents in Malawi, the traditional approach to special education as it used to be practised in developed countries has influenced the development of special schools and classes in mainstream schools in the country. As discussed earlier, the normative assumptions of the traditional medical deficit model approach to special education still shape and drive the development of inclusive educational systems in Malawi.

Our analysis of Malawian educational policy documents clearly showed that there is substantial ambiguity between wider social and individual approaches towards 'special educational needs'. Education in Malawi is currently in a state between the traditional medical deficit model approach to special needs education and an inclusive education approach based on a wider definition of special education needs that includes marginalized learners and recognizes the impact of social and institutional disadvantages.

In the preamble of the National Education Sector Plan (NESP), it is stated that "Overall Special Needs Education programmes will feature prominently" (MoEST, 2008, p. 1). The NESP uses the term 'special needs' several times—e.g., "poor access for children with special needs" (ibid., p. 9)—apparently, based on the National Policy description of special needs education (Ministry of Education and Vocational Training Malawi, 2007). It names inadequate access of special needs learners to each education sub-sector (Early Childhood Development, Primary Education, Secondary Education, Non-formal Education) as a challenge (ibid., p. 5, p. 7, p. 9, p. 11, p. 15). To increase access to different disadvantaged groups, the NESP aims to "Increase net enrolment and completion rates, targeting those disadvantaged by gender, poverty, special needs and geographical location, encouraging all children to complete the eight years of primary education" (ibid., p. 12). The target groups mentioned here point to the perception that various differences beyond disability or impairment can lead to disadvantage or exclusion. This reflects a core element of the concept of inclusion, but addressing these various target groups is not mentioned when discussing the term 'inclusion', and the term 'inclusive education' itself is not mentioned in the NESP.

The preface of the National Policy on Special Needs Education mentions that the document "includes a detailed overarching statement on inclusion" (Ministry of Education and Vocational Training, 2007, p. 4). However, 'inclusive education' is not mentioned anywhere else in the document, except within the provided

definition of inclusive education. A striking finding was that the proposed strategies with regards to special needs learners mainly target children with sensory and motor impairments, like the use of sign language, Braille material and assistive devices (Ministry of Education, 2009b, p. 8); moreover, this national policy document does not provide a broader approach to children with special needs caused, for example, by poverty or chronic illness.

It can be stated that, although the Malawian Government is formally committed to inclusive education, it cautiously and rarely uses the term 'inclusive education' in its education policy papers. No explicit definition of inclusive education is provided there. These documents predominantly reflect the term and concept of 'special (needs) education' with an emphasis on disabilities. It can therefore be concluded that, although the admission of children with 'special needs' (for example, disabilities) into mainstream schools is well-intentioned, such thinking is based on the traditional medical deficit model, and this approach to special educational needs still shapes inclusive education policy in Malawi. As a result, there is no consistent and clear understanding of what inclusive education is and what it means for both mainstream education systems and existing specialized forms of support for children with disabilities in Malawian education policy documents. The resultant lack of clarity in inclusive education policy and the fact that most implementation measures support an understanding of special needs education that focuses on disabilities was evident in all analysed policy papers.

Our analysis of the above-mentioned documents showed that there is awareness that children with special needs, as defined at policy level, have inadequate access to education, and that broad strategies have been formulated that should be implemented with the aim of increasing access to all education sub-sectors. The definition of learners with special needs in some instances shows a broad view of special needs that includes children with socio-emotional and behavioural difficulties and vulnerable children such as poor, abused, neglected and orphaned children. However, as mentioned before, measures in the proposed strategies mainly target children with sensory and physical disabilities based on the medical deficit approach to diverse educational needs. The lack of a coherent response in policy documents to the development and implementation of inclusive education highlights the fragmented and ambiguous approach within Malawi in this regard, including the lack of strategies to improve the acceptance and participation of all children regardless of e.g., ability, gender, disability and socio-economic status.

Nevertheless, awareness of different dimensions of disadvantage is apparent. Interventions for specific groups that face possible exclusion (e.g., girls, children with disabilities, poor and orphaned children) have been formulated but not stringently grouped under a common concept of inclusion. However, a core element of inclusion can be found in the formal Malawian perspective on education for all: The acknowledgement that various groups face barriers to learning, with specific

reference to access to education. Concepts to support these groups selectively exist and are being implemented. This could be described as a group-oriented concept of support. Nonetheless, a change of focus toward adapting the system to be able to deal with heterogeneity and disadvantage within the system is desirable for the future of inclusive education in Malawi.

3.2 Malawi Between Idealism of Policy and the Reality in Schools

The government of Malawi has signed the major international conventions concerning education, including the Salamanca Statement, the UN Convention on the Rights of the Children, the UN Convention on the Rights of Persons with Disabilities, the Education for All Initiative, the Millennium Development Goals, and the Post-2015 Agenda. International pressure resulting from these conventions, goals and strategies concerning inclusive education has ensured that Malawi and other sub-Saharan countries are in the process of implementing inclusive education within their own education systems. Despite the direction provided by policy documents such as the Southern Africa Inclusive Education Strategy (Southern African Development Community, 2012), it is still unclear how these supra-national goals can be achieved and re-contextualized at the macro, meso and micro levels.

As described in section 1 of this chapter, Malawi is characterized by economic inequalities and a high level of poverty, which results in a serious lack of resources (financial, material and personnel) at all levels of the educational system. This lack of resources is a challenge to providing quality education for all children and therefore forms a barrier to achieving international goals related to inclusive education. Furthermore, sub-Sahara Africa has been identified as the world's poorest region with the world's largest proportion of vulnerable children, including those with HIV/AIDS and other diseases, disabilities, poverty, limited access to professional services, and child-headed families (Mwoma & Pillay, 2015).

Both governmental and non-governmental stakeholders at the national level in Malawi show great commitment to the international goals regarding the development and implementation of inclusive education, and policy documents indicate willingness to adopt the international vision of inclusive education. However, emphasis on realistic strategic objectives and dynamic goal-directed actions is deficient, and a method for the allocation of resources that takes the realities of schools into account is lacking in plans for the implementation of inclusive education in Malawi. As a result, there is uncertainty and misunderstanding about the purpose of policy documents and the realization of international agenda goals regarding inclusive education within the unique socio-economic contextual conditions in Malawi. The implementation of inclusive education has already created negative pressure on people working in the education sector in Malawi, especially at the micro level (Fullan, 2010).

However, our study revealed innovative thinking and the development of creative approaches towards inclusive education at the micro level. (Young) mother and father groups are grassroots organizations run by parents from the community. According to many different stakeholders, these groups play an important role in encouraging and supporting students who are not in school to start or re-enrol in school; they also assist in measures to keep children in school, such as school feeding programmes. Another successful grassroots initiative was observed in one of the case study schools—a primary school that established a vocational training centre for students who are not able to continue their secondary education. For more details on initiatives at the micro level, see chapter 2.2 of this publication. Nonetheless, these innovative community-based strategies are isolated initiatives. They are not embedded in a broader implementation context or common discourse about inclusive education and are thus unable to contribute to raising the existing capacities within schools and districts throughout all of Malawi. It would be desirable to have communication between all levels regarding the questions of what is achievable and how negative pressure can be avoided.

The fundamental question arising from the described situation is how to implement inclusive education in a country like Malawi, which is characterized by the overwhelming lack of resources, without diluting the actual concept of inclusion and without creating negative pressure. Some might even question if it is at all possible to implement inclusive education in a context like Malawi.

In the scope of this chapter, we can only attempt to formulate a reply to this fundamental and complex question. As mentioned earlier and described in more detail in the next chapter, several local grassroots initiatives have been launched at the school and community level in Malawi to address various needs of different disadvantaged groups, such as girls, children with disabilities, orphans and poor children. Aggregation, coordination and up-scaling of these initiatives would contribute essentially to the implementation of inclusive education. Furthermore, as we pointed out before, a broad understanding of different disadvantaged groups is evident in Malawian policy papers. This forms an essential building block in the implementation of inclusive education. If inclusive education is regarded as a concept to maximize acceptance and participation as well as children's psychosocial development and personal achievement and to minimize discrimination, many innovative approaches can be observed in Malawi. However, if inclusive education is considered an ideal status which has to be achieved, inclusive education turns into a lofty goal that is potentially unachievable. Furthermore, as this goal is very unspecific, inclusive education has also been described as a 'slippery concept' (Artiles & Dyson, 2005). In such an understanding of inclusive education, negative pressure is inevitable as no country in the world can claim to have a fully inclusive educational system.

However, if inclusive education is seen as a process of acknowledging the heterogeneity of learners and using heterogeneous learning and teaching practices instead of trying to minimize heterogeneity, it should be possible to gain a perspective on implementing inclusive education systems in which access, acceptance and participation can be developed, even in low-income countries. In our opinion, the development of inclusion can serve as a critical scaffold for reflection on concrete current situations and planned measures for the implementation of inclusive education in unique ways and in unique contexts.

Inclusion is a concept describing the reflective handling of heterogeneity in pedagogical contexts to overcome the systematic disadvantages of specific individuals and groups. Inclusion embraces the idea of a non-discriminating school and aims to sensitize all stakeholders to these issues. Again, this task cannot be achieved by short-term action. Efforts to implement an inclusive school system can lead to a critical distance between recent structural conditions and practices by politicians, representatives of the educational administration, school principals, teachers and parents.

Therefore, inclusion becomes a concrete task which focuses on critical reflection of marginalizing and excluding structures and educational conditions and practices. The insights from such reflection can lead to small but (under given circumstances) feasible projects designed to overcome disadvantages. Thus, inclusion is not a simple set of instructions for school development, but rather a strategy for a reflective analysis of structures and practices from which clearly defined options for action appropriate for specific local and regional conditions can evolve.

It needs to be stated that, regarding an understanding of inclusive education in the latter perspective, it remains a process characterized by inconsistencies and contradictions. Consequently, there is a need for constant discourse between all stakeholders on how to maximize participation and the development of personality and achievement, and to minimize discrimination in the respective contexts. This perspective focuses on practicability, feasibility and concrete changeability. Therefore, inclusion is an ongoing process which should probably never be terminated. In a nutshell, inclusion is a never-ending process designed to increase access, acceptance and participation while taking into account the mediating cultural forces that shape the way in which a unique context defines and addresses inclusive education.

3.3 Malawi Between Traditional Orientations, Demands of Daily Living and Formal Education

People's perceptions of the usefulness and relevance of formal education affect whether and how long a child remains in school (Donald, Lazarus, & Lolwana, 2009). Therefore, the ability of students with diverse educational needs to meaningfully participate in schools and communities is affected by the cultural at-

titudes and values of their wider school communities. This is one of the essential aspects to consider in the implementation of inclusive education (Donohue & Bornman, 2014).

As shown by our research results, traditional and cultural orientations and values tend to make competing demands on formal education in Malawi. One cultural practice that has far-reaching consequences for formal education is the so-called 'initiation ceremony' due to the psychological impacts and social expectations and demands on children after the completion of such ceremonies. However, it should be noted that the frequency, importance, and practice of initiation ceremonies varies greatly between different regions of the country (Munthali & Zulu, 2007). The *refie* data show that initiation ceremonies are relevant factors affecting education for both boys and girls, but their impact is gender-specific. The purpose of initiation ceremonies for girls is to teach them about their expected role as woman, wife and mother. Sexual initiation is often part of these ceremonies, which can last for several weeks and are sometimes conducted during school hours. It is said that female children enter the initiation ceremonies as girls and are released as women. After 'initiation', some girls soon drop out of school due to pregnancy or marriage. Some become pregnant directly as a result of the sexual initiation practices carried out during the ceremonies.

The traditional orientation among some Malawians is that women who are pregnant or who have had a child should not continue with any kind of formal education; this view also became apparent during our research. Parallel to female initiation, there are initiation ceremonies for boys' transition into adulthood. Male students who undergo initiation ceremonies perceive their role at schools differently after being initiated. Most boys continue their formal education, but some are reportedly no longer willing to subordinate themselves to adult teachers after such rites. This can lead to disciplinary measures and, ultimately, school dropout or expulsion of male students. The impact of such initiation ceremonies on education is currently increasing because the age in which children participate in these practices is decreasing significantly.

Furthermore, our results indicate that parents of children with disabilities generally do not send these kids to school in communities that do not recognize the importance of educating children with disabilities and where negative societal attitudes towards disabilities exist. In Malawi, the right to formal education must compete with the demands of daily life, specifically the struggle to meet basic financial needs. Many students attend school irregularly or drop our completely due to family responsibilities related to generating income and other things required so that the family can cope. Since school fees were abolished in Malawi in 1994, almost all Malawian children start primary school at some age. An analysis of all primary school standards showed that most students drop out of school during or at the end of Standard 1 (MoEST, 2013, p. 38). The need to assume

family responsibilities was the main reason for dropout, and it affects boys at the same rate as girls. Employment was a significantly more common reason for dropout among boys than in girls (ibid.).

Formal education systems in post-colonial countries like Malawi were generally initiated during colonial times. Consequently, formal education structures originally 'imported' by the colonizing country are often still implemented and continued in post-colonial times (Mpofu, Kasariya, Mhaka, Chireshe, & Maunganidze, 2007).

Education (and therefore also inclusive education) is always embedded in a specific cultural, societal and historic context. As the development of formal education systems does not occur detached from these contexts, it cannot be analysed or discussed as isolated from them. Mutua & Swadener (2011) stress that community concepts of formal education, including education for children with disabilities, need to be taken into account if formal education is to be understood in a unique cultural context. These considerations form the essence of the concept of education in a specific context. Therefore, it is necessary to question whether the current formal education system in Malawi is context-sensitive and relevant, or if it needs to be adapted. Dei (2010) stressed that education in Africa as relevant when it is "anchored in local people's aspirations, indigenous cultures and values, and tailored foremost to meet local needs and concerns. This form of education has a better chance of promoting collective social development" (p. 57).

In Malawi, traditional cultural orientations as well as the direct and indirect financial costs of keeping children in school compete with the demands of formal education. This leads to the question of how formal education should be organized and structured, not only in terms of teaching and learning methodologies and curricular aspects, in order to be of relevance to and in compliance with life in Malawi, and to aid in the development of information and advocacy programmes to address negative cultural perceptions of disability and education for every child. By applying inclusive education as a scaffold for critical reflection, traditional orientations and practices which lead to school dropout (e.g., initiation ceremonies) might be successfully challenged and seen in a new light.

4 Future Perspectives

Before concluding this chapter, we will reflect on possible limitations of the research results on which it is based. We do not claim that these results are representative for Malawi as a whole as the research design followed a qualitative approach with the intention of focusing on multiple socially constructed realities in specific contexts (Mertens, 2005). This implies that, within this complex structure of interwoven subjective theories and reflective knowledge of processes of action, interaction and communication as well as directly relevant political and organizational conditions, our research focused on the constructions and interpretations of inclusive and exclusive processes of the groups of persons involved at the relevant system levels.

When developing future perspectives on the implementation of inclusive education in Malawi, special focus must be placed on multi-level discourse on the concept of inclusive education. Notions of inclusive educations should be discussed and clarified by all stakeholders at the national, district, community and school level of the education sector. Based on this multi-level discourse, achievable goals should be agreed upon at all levels. This is crucial in order to develop concrete and pragmatic implementation strategies and should lead to the avoidance of negative pressure. The concepts and goals of inclusive education must be developed in a context-sensitive manner and, therefore, can vary between different countries or even between different regions and communities of one country.

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2.2 Global Processes and Local Manifestations: Two Case Studies from Malawi

The high international goal of inclusive education faces complex realities in developing countries such as Malawi. Inclusive education is a high priority on the political agenda. Malawi is moving in the direction of inclusive education, as can be identified in various processes across the country. This landlocked country in southeast Africa has a rich culture and great potentials. Its population is characterized by cultural diversity and has a variety of ethnic groups, languages and religions. Although the country struggles with overwhelming economic inequalities and global challenges, such as low life expectancy and high infant mortality, positive developments can be identified (see chapter 2.1).

In the previous chapter, three topics or dimensions of research were identified which capture the major findings from Malawi. As has been discussed previously, such a process of realizing inclusive education must be regarded critically as it reflects concepts imported from developed countries. Hence, the implementation process impacts the education system in Malawi differently. The dimensions presented previously form the underlying structure for the analysis of the two case study schools.

The three research dimensions or themes identified are as follows:

1. *Special education and inclusive education*: The Malawi education system currently is in an 'in-between state' in which the global goal of inclusive education competes with the still dominant concept of special education, which focuses on students with disabilities and is still dominated by the medical deficit model.
2. *Policy idealism and reality in schools*: Global education goals face the challenges of school reality. In Malawi, concrete goals and responsibilities are missing, and economic inequalities shape the reality of schools.
3. *Traditional orientations and formal education*: In Malawi, the values of formal schooling compete with traditional values and cultural orientations. This strained relationship affects students' attitudes towards formal education in several regards.

Across the country, some similarities can be identified with regard to processes for the realization of inclusive education, but huge differences in the implementation

of inclusive education also exist. To facilitate an understanding of inclusive education in Malawi, we focused on concepts of inclusive education as well as processes of implementation from various perspectives. This calls for a qualitative inductive approach such as the one we used here. Drawing on a multiple instrumental case study approach (Stake, 2005), the aim was to consider the complexities and gain insight at a moderate to high level of abstraction. Cases with maximal differences were selected in order to illustrate how global processes impact on and manifest in local processes. The underlying theoretical frame captures the micro, meso and macro level within a systemic approach, and is sensitive to ongoing processes at all three levels.

1 Methodological Issues

In qualitative research, we view the research process as being deeply embedded within social realities. This research process comprises the course of mutual meaning-making by the researcher and the researched (Kvale, 1994; Mruck & Breuer, 2003; Wilson, 1970). As stated before, by drawing on an instrumental multiple case studies' approach (Stake, 2005), we aim to consider the complexities and gain insight at a moderate to high level of abstraction.

According to the overall research questions, we were interested in the participants' concept of inclusion as well as strategies for the realization of inclusive education. In keeping with our underlying concept of inclusion, we were interested in which student characteristics they considered relevant with regard to inclusive education. Along with the guiding themes introduced above, we will touch upon the questions of who and what is involved and how, and will examine how this is reflected at the meso and micro level.

Case study schools with maximal differences were selected for analysis. The table below gives an overview of all four case study schools considered. The differences listed below refer to school size, class size, and school location, which are key characteristics of educational infrastructure. The case study schools showed similarities regarding low teacher qualifications. Schools A and B were selected as the two contrasting cases. One (school A) is located in a rural area and the other (school B) in an urban area of Malawi. Moreover, they differ in size as well as sensitivity for different groups of children.

Tab. 1: Characteristics of the four case study schools in Malawi

	School A	School B	School C	School D
School size (approx.)	1260 students	2460 students	1360 students	1000 students
Students per class (*)	70	275	170	125
Teachers (*)	35	33	12	18
Teacher gender	Predominantly female			
Teacher qualifications	Predominantly Malawi School Certificate of Examination (MSCE)			
Area	Rural	Urban	Rural	Urban
Main ethnic group(s)	Yao	No predominant ethnic group	Ngoni	No predominant ethnic group
Main language(s)	Yao	Chichewa	Tumbuka	Chichewa
Predominant occupation of families	Subsistence farming, small-scale business	Small-scale business	Subsistence farming, small-scale business	Small-scale business
Language of instruction	Chichewa in grades 1 to 4, English in grades 5 to 8			
Special infrastructure	Early childhood centre nearby	Resource centre, vocational training centre	Resource centre in the district	Resource centre in the district

(*) Average number

Interviews at the meso level were conducted with stakeholders in different areas of responsibility, including education and health. Coordinators at the meso level have quite specific areas of responsibilities related to certain disadvantaged groups, such as girls, orphans, street children, children affected by HIV/AIDS, and children with disabilities.

Interviews at the micro level were conducted with students, parents, teachers and head teachers. Schools in Malawi have different types of parental support groups (e.g., (young) mother and/or father groups)[1], School Management Committees (SMC), and Parent-Teacher Associations (PTA). Mother and father groups are grass roots initiatives of parents from the community[2] (see also chapter 2.1). If

1 Such (young) mother and father groups are grass roots initiatives.

2 Due to anonymization, they are not identified separately in the following. Only one father group and one young mother group participated in this country study. Hence, in the following the term

such a group was established at the case study school, representatives of these groups were interviewed as well.

In case study A, four stakeholders with different areas of responsibility were interviewed: The District Education Manager (DEM), the District Social Welfare Officer (DSWO), the Orphans and Vulnerable Children Coordinator (OVC), and the District School Health Nutrition HIV Coordinator (SHIN). While the DEM and SHIN work for the Ministry of Education, Science and Technology (MoEST), the DSWO and OVC answer to the Ministry of Gender, Children, Disability and Social Welfare.

In case study B, four stakeholders with different areas of responsibility were also interviewed. Except for the Orphans and Vulnerable Children Coordinator, their areas of responsibility were the same as those of their counterparts in school A. The fourth person interviewed was the Special Education Needs Coordinator.

In both case study schools, interviews at the micro level were conducted with students, parents, teachers and head teachers. Additional interviews were conducted with members of parental groups (mother, young mother and/or father groups). The group village headman of school A was also interviewed. In Malawi, such local authorities play an important role in family and community affairs (Chisanga, 2006).

2 Characteristics of the Selected Case Study Schools

2.1 School A: Located in a Traditionally Oriented Rural Area of South-eastern Malawi

This primary school, established in 1953 by the Local Education Authority, is located in the South Eastern Education Division (SEED). It has a Home Grown School Feeding Programme. There is no resource room for what is termed special needs learners. The school is located near an early childhood centre, which provides access to most of the learners in the surrounding area. Two kilometres south of the school is a teacher training college. Most parents in the area are subsistence farmers. Some run a small-scale business, work and/or depend on remittances from children or relatives.

Learners at the school are Malawian by birth. However, the pupils come from diverse ethnic groups, the largest of which is Yao, followed in order of prevalence by Lomwe and a few Chewas/Mang'anya and Ngonis. School A is located in a

'mother/father groups' will be preferred. This term also includes young mother groups. Exceptions are made dependent on content: Some results refer to gender-specific experiences of mothers – in this case the term 'mother group' refers to either mother groups or young mother groups.

Yao and Muslim-dominated district in eastern Malawi. The language of instruction is Chichewa in the early grades, and English in the higher grades. However, the dominant home language of the children is Yao, followed by Chichewa. The school has 1257 students: 545 boys (43.4 %) and 712 girls (56.64 %). According to the head teacher, the majority of students are girls. He explained that this was the result of interventions by non-governmental organizations (NGOs), which mainly focus on supporting girls' education. Generally, the respondents viewed this as a positive development, but also discussed points of criticism (see results section). Ninety pupils with a variety of learning difficulties and disabilities, including physical disabilities, low vision and hearing impairments, were identified. In the school, these pupils are referred to as 'special needs children'.

The head teacher has a Malawi School Certificate of Education and was qualified as an Initial Primary School Teacher by a teacher training college 35 years ago. He has been a head teacher for 24 years, including ten years at school A. The school has 35 teachers but no special education teacher. However, one (female) teacher has an additional qualification as an 'itinerant teacher'. Itinerant teachers are qualified to work with several schools in a school zone. They support students with special needs at the respective school[3]. The majority of teachers at this rural school are female (22 out of 35). Almost all of the teachers have a Malawi School Certificate of Examination (MSCE) which students receive after completing secondary education. There is also a large number of student teachers for both Initial Primary Teacher Education programmes (IPTE), IPTE Open Distance Learning (ODL) and IPTE Conventional (refie, 2015).

A mother/father group at this rural school assists in feeding fish in the ponds, preparing porridge for learners, counselling girls, and cultivating the school garden. By selling products from the garden at the market, they earn money for the pupils and the school. They also talk with parents about the need for girls to go to school and support school re-entry for girls who dropped out of school for various reasons (for example, by providing writing materials). Moreover, they counsel the parents and guardians of children who drop out of school due to pregnancy, work and/or early marriage. They also counsel children, especially girls, to prevent them dropping out of school. A fathers group was established after the realization that boys need support as well to finish primary school. As described in the results section, boys are at risk of dropping out of school due to pressure to earn money for their families. The main role of the fathers group, therefore, is to monitor the attendance and behaviour of boys at school, help cultivate the school garden, and

3 Initially, this support was limited mainly to visually impaired learners but in 1996 was extended to include pupils with hearing impairments and learning difficulties as well (Missinzo, 2009; Lynch & McCall, 2007).

collaborate closely with the mother/father group in the development of positive attitudes towards formal education.

The Yao ethnic group has a traditional practice known as the traditional initiation ceremony for older boys and girls. Traditional initiation ceremonies for both genders are most common in the southern region (Munthali & Zulu, 2007). In this study, we found such traditional initiation customs solely in the southern region in both case studies presented here. Moreover, respondents in the case studies emphasized the importance of the urban-rural divide (refie, 2015). There are transition ceremonies. Both girls and boys attend such ceremonies when they reach puberty. Girls and boys are taught cultural practices as well as values and orientations. The specific content, however, is gender-related. Girls, for instance, are initiated in sexual practices through a ceremony known as cleansing (Kusasa Fumbi) (Munthali & Zulu, 2007). A consequence is early pregnancy and early marriage. Girls and boys also often change they attitude towards school after such ceremonies (see results section). Thus, those traditional initiation ceremonies affect the formal education of both boys and girls, but in different ways. The consequences for formal education from the perspectives of stakeholders will be discussed in the results section.

2.2 School B: A Large Urban School in a Densely Populated Township

School B is located in the South West Education Division. It is located within a big city in the south of Malawi, four kilometres from the central business district. The primary school was established in the 1960s by the Malawi government as a Local Education Authority School. School B has a resource centre and a vocational training centre, both of which are funded by a Scottish welfare organization. Additionally, a special education teacher is assigned to this school.

All children at school B are Malawian by birth. This urban community has no dominant ethnic group. As mentioned earlier, the people who send children to this school belong to different ethnic groups. Most of the students come from poor households. Their parents and guardians either work in the city or run small-scale commercial businesses. Very few parents or guardians have lucrative jobs or lucrative commercial businesses. The majority of affluent people in this community do not send their children to the primary school, but to private schools which, according to the parents, offer better educational quality. Women run small-scale businesses or small restaurants at the main market. Men work in sales (e.g., selling hardware items in stores at the main market) or manage bars.

School B has 2463 students: 1236 boys (50.2 %) and 1227 girls (49.8 %). Most come from poor households in the nearby township and surrounding communities. 67 (2.7 %) of students at this urban school have disabilities. The most common types of disabilities are learning disabilities (31.3 %) followed, in order of prevalence, by visual impairments (14.9 %), hearing impairments, and physical

disabilities. Students with disabilities are initially instructed in the resource room with the aim of preparing them to participate in regular classes later on. According to the head teacher, the school accepts all learners with various educational needs. The school's head teacher (male) has a Malawi Schools Certificate of Education (MSCE), a teacher certificate in education and a Diploma in management. School B has a total of 33 teachers: 3 male and 30 female. All 3 male teachers and 25 female teachers have the highest academic qualification, the MSCE, and only 5 female teachers have the Junior Certificate of Education (JCE)[4]. All teachers additionally have teaching certificates.

The language of instruction is Chichewa in standards[5] 1 to 4, and English in standards 5 to 8 (except when Chichewa is the class/subject). The teaching language is a highly contentious issue among the parents and guardians of learners. As the school is in an urban area, it attracts students from different parts of the country, who live with their parents in the city. As mentioned before, people from different parts of Malawi speak different languages.

In addition to the resource centre and the vocational training centre, the urban school has a special school feeding programme which is funded by an NGO. School B has several special interest groups, whose main mission is to support the school, e.g., by monitoring school processes. These are the School Management Committee (SMC), the Parents-Teachers Association (PTA), the Parents of Students with Disabilities Committee, and the mother/father group. Each group has different roles and responsibilities. The mother/father group at this urban school is comprised of middle-aged women who dropped out of primary or secondary school as well as older women who are either housewives or manage small-scale businesses in the community. The Parents of Students with Disabilities Committee was established by parents themselves to promote the welfare of students with disabilities. All members are parents of children enrolled at the school.

3 Dimensions of Analysis and Findings: Special Education and Inclusive Education

As stated previously, policy documents indicate that Malawi is currently in an 'in-between state' of implementing special needs education. The current approach tends to focus on medical deficits and more inclusive education while acknowledging a variety of diverse educational needs. The previous chapter showed inconsistencies identified at various levels. On the one hand, inconsistencies in policy documents were observed regarding the question of who should be addressed by

4 After two years of secondary school the Malawi junior national certificate examinations take place.
5 grades

inclusive education. While other educational disadvantages besides disabilities are also considered (e.g., female sex, poverty and geographical location), this is not linked explicitly to the concept of inclusive education (see chapter 2.1). The aforementioned aspects touch upon processes of constructing specific groups and processes of categorization of children based on certain criteria by the different stakeholders. This is likely to diminish other criteria which would lead to a more complex view of children[6]. With regard to the question of how various groups are referred to, on the other hand, there is a strong emphasis on educational access, especially for children with 'special needs' but also for children with other disadvantages. Other strategies to support and enhance acceptance and participation were rarely mentioned (see chapter 2.1). According to our underlying theoretical concept of inclusive education, we focus on the three dimensions of inclusive education: Access, acceptance and participation (see Introduction). Thereby we draw on the concept of inclusive education which differentiates between four dimensions of inclusive education, access, acceptance, participation and learning achievement (Artiles, Kozleski, Dorn, & Christensen, 2006). Those dimensions focused on, especially the dimensions of acceptance and participation, are strongly related to educational quality as well. We will elaborate on this later (see chapters 4 and 5). Against this backdrop, educational access (which only refers to the physical presence of students at school and in classrooms) must be regarded as a mere precondition for education.

Following a multi-perspective and multilevel approach, concepts and understandings of inclusive education from the perspectives of different stakeholders at the meso and micro level will be presented in the following section. According to the issues discussed in the previous chapter and emphasized above, we will then have a closer look at who is addressed and which dimensions are considered. With regard to the question how particular groups are addressed, we refer to the underlying concept of inclusive education, which comprises the dimensions of access, acceptance and participation.

6 Drawing on Honneth and Margalit (2001), such processes of constructing can be understood as processes of 'recognizing'. Using the terms 'invisibility' and 'visibility', the authors emphasize its figurative meaning with specific reference to a form of a social state of affairs. Honneth and Margalit (2001) thereby differentiate between two qualities of visibility, 'cognizing' and 'recognizing'. Whereas 'cognizing' refers merely to the physical presupposition, 'recognizing' is driven by the intention of an individual to give someone the recognition which he or she thinks is appropriate and he or she is willing to provide the person addressed (ibid).

3.1 Findings at School A

3.1.1 Meso Level Findings: "Who Is Addressed and How" Depends on the Stakeholder's Concept of Inclusive Education and Area of Responsibility

In case study A, the concept of inclusive education varies between the micro and meso level as well as across each level. All stakeholders at the meso level are aware of specific groups of children, for instance, children with disabilities, orphans, children affected by HIV/AIDS and/or girls. However, their concepts of inclusive education vary. Moreover, these concepts are strongly related to their area of responsibility. Furthermore, the specified actions and intervention strategies for various groups vary in terms of the dimensions of access, acceptance and participation. Access, however, was predominantly mentioned with regard to discussed actions.

Although all stakeholders at the meso level are aware of the problems facing different groups, the concept of inclusive education still is strongly associated with children with disabilities. Hence, the District Education Manager mainly links the concept of inclusive education to students with disabilities.

> I think one of the duties involves sensitization of the general population and the need to send their wards to school despite having certain disabilities. Even the teachers that are there in the schools, we are also doing something for them so that they can be in a position to assist the special needs learners that are being co-opted into the school system. (District Education Manager, school A)

With regard to the challenges to formal education, all respondents focused mainly on girls. Reasons for this are mentioned by the stakeholders at the meso (and micro) level. Through the school being located in a rural area, traditional orientations within the community, mainly those regarding the role of the girls within society, are very strong. Accordingly, school A stakeholders agree that girls are one of the most disadvantaged groups with regard to access. Furthermore, most of them referred to continuous access as a main problem. This was also true at the micro level. Traditional initiation ceremonies were named as a reason for girls dropping out of school:

> Especially when they go to traditional initiation ceremonies. I don't know what is going on there. But after coming out of traditional initiation ceremonies, they drop out of school. Some are impregnated and get into marriage and the like. (Orphans and Vulnerable Children Coordinator, school A)

School A stakeholders also discussed the presence of non-governmental organizations that provide educational support structures, especially for girls. They made

positive comments about such support structures, but also discussed the negative aspects of such an oversupply. According to the District Education Manager, there is a large increase in female students at the school due to interventions by various stakeholders, especially NGOs:

> In terms of accessibility, at least because of numerous interventions that have gone by [in] the past, we have recorded a bigger number of learners that have been given good access into our education system. For instance, at the moment we have more girls in the school system as compared to boys, which is a positive attribute as compared to the situation which I found when I joined the system in two thousand five where we had more boys than girls. So we strongly feel that, [due to] the number of sensitizations that have been conducted in the past, we have managed to reach the communities, and this is why we have this positive attribute in having a gender parity index. (District Education Manager, school A)

However, the stakeholders also emphasized the need to be sensitive enough to detect the potential 'invisibility' of other groups due to the disproportionate attention to girls. The District Social Welfare Officers, referring to this problem, stated that an oversupply of support for girls discriminates against boys, and emphasized the need for equity for both boys and girls:

> We don't have enough resources for bursaries. We are not reaching out to every child. Boys are having problems. We have no much support for boys. We needed interventions to carter for both boys and girls not to discriminate. (District Social Welfare Officers, school A)

Educational access is of relevance from the perspectives of different meso-level stakeholders at school A. Accordingly, strategies to increase educational access are predominant. This will be discussed in detail in the next section (section 4.2). However, all three dimensions of inclusive education are closely related. The presence or absence of interventions promoting acceptance and participation increase the probability that students will continue their primary education or drop out of school, respectively. At the meso level, the District Education Manager explained issues relating to acceptance. Various groups of students risk experiencing a lack of acceptance by their peers. The District Education Manager referred to students with disabilities and students affected by HIV/AIDS as being particularly at risk. He explained why, in his opinion, they encounter discrimination:

> Maybe, because of the nature of the issues concerned, there may be some misconceptions that maybe these learners can 'share' this [disease] with somebody else, that means they can pass on the viral infection to the others, which might not be true per se. (District Education Manager, school A)

The District Education Manager also described interventions aimed at increasing acceptance among all learners:

> In terms of the learners, we normally conduct sensitization [campaigns] on this and a number of issues, on how they can be at peace with their colleagues as well as sharing whatever they have with the less privileged ones. (District Education Manager, school A)

As will become apparent later, especially in relating this perspective to micro level, acceptance still seems to be a barrier to formal education that can cause students to drop out of school. However, strategies to increase acceptance are recognizable.

3.1.2 Micro Level (School A): The Questions of "Who Is Addressed and How" Reflect Specific Local Traditions and Overarching Global Economic Inequalities

Micro-level stakeholders at school A are also aware of challenges to formal education for different groups. While the needs of all children are addressed in the scope of activities, inclusive education here mainly focuses on children with disabilities. Similarly to the meso level, stakeholders at the micro level also mentioned the high attention to girls' education and that a lot of interventions address girls. For various reasons, access to school is still a major challenge. The interventions mainly address educational access of specific groups, but the dimensions of acceptance and participation are also addressed. We will elaborate on teachers' efforts in more detail in the following (see section 4.2). However, predominant challenges exist which impact the dimensions of acceptance and participation within the school. The weakest dimension is participation—the dimension challenged most by barriers within the school, e.g., overwhelming situations in classrooms and the lack of resources.

At the micro level as well as the meso level, the concept of inclusive education is partly still associated with students with disabilities. When explaining interventions designed to increase acceptance of students with disabilities, the head teacher referred to inclusive education as follows:

> We also make children to interact with special needs learners. They should all sit in the desk with their friends and should not be isolated. When we put him or her in the corner, it looks like they are useless. Even when doing physical education, we allow them to interact. We try to make it inclusive. (Head teacher, school A)

Indications for the relation of the concept of inclusive education to children with disabilities could also be identified in the focus group discussion with teachers at this rural school:

> The other challenge is that the pupils we have like at this school have hearing or sight problems, so resources at this school to necessitate proper teaching of these pupils are not available. For example, in my class I taught a child who had a sight problem and the other one had a hearing problem. But resources were a problem. So I feel that this is also another challenge. (Teacher, school A)

Later on, a teacher asked whether the interviewer was referring to education in a broad or a narrow sense:

> Interviewer 1: Okay, fine. So if we look at education in general, and if we look at access to education, which aspects do you consider as important?
> Respondent: Education in general or to the disabled only? (Teacher, school A)

This can be interpreted as evidence of a stage in between an inclusive education approach considering all children and a 'special education' approach emphasizing education for children with disabilities. This teacher seems to be aware of the difference between a narrow versus broad understanding of inclusive education. Moreover, the teacher's request for clarification shows not only the ability, but also the need for teachers to be flexible regarding these two conceptions.

With regard to the dimensions of access, acceptance and participation, barriers affect students differently and depend on certain characteristics. The teacher cited in the following quote talked about challenges facing orphaned students who attempt to obtain a formal education. These challenges touch on all three dimensions:

> There are children like those orphans, whose parents are dead. […] When one has not taken food or has worn clothes which are not good comparing to a friend who has worn good clothes, [the child] gets worried. In this way, one's education becomes affected in a negative way. When he gets in the class, instead of concentrating on what the teacher is teaching, then he stays quietly, just thinking of his problems, and thinking that maybe [when] he leaves school, he is going to find nothing to eat at home thinking about doing the household chores, for there is no one who can help them. These things make the education of children to be affected. (Teacher, school A)

As he explained, orphans are burdened in several regards. On the one hand, poverty leads to practical barriers, such as lack of food and clothing. On the other hand, this places psychosocial burdens on the child. Such factors affect inclusive education on all three dimensions. The factors mentioned by this teacher mainly refer to participation, as this child has problems concentrating during class. Moreover, as explained by other stakeholders at the micro level, a lack of resources such as clothing also poses challenges as this affects acceptance by one's peers. Although this teacher explained the consequences in terms of the child comparing himself to a friend, other respondents, such as parents and female students, explained impacts regarding the discrimination of orphans by peers.

When regarding the consequences of discrimination, the strong relationship between the dimensions becomes apparent. Experiences of discrimination can lead to dropouts and therefore are relevant to access. One member of a mother/father group explained the situation as follows:

> They are sometimes laughed at by fellow learners because of the way they look. They don't know why they are like that and because of that, they feel they are not worthy to be in school and eventually drop out of school. (Mother/father group member, school A)

As on the meso level, a disproportionate focus on girls as a disadvantaged group was also noted at the micro level. Meso-level stakeholders discussed this phenomenon and its consequences for other groups. Similar views were expressed at the micro level. Statistics have shown that employment is a gender-related reason for boys to drop out of school (MoEST, 2013). Teachers at school A confirmed this, explaining that boys often start to work by transporting people by bicycle. Moreover, they believe that the reasons for boys dropping out are related to the family background of these students.

> But that problem mainly comes from parents because they do that when they see that their child has grown up and they let him do that [to help them earn money for food at home]. They feel that when that child goes to school, he will be delayed [late for work]. Hence, the child is discouraged [from going to school]. (Teacher, school A)

While most stakeholders still agree that girls are the most vulnerable group, one stakeholder expressed a different opinion, comparing chances and barriers to formal education for boys and girls:

> I see that a girl child is better off because most boy children, when they have reached a certain age, they start doing bicycle hires, while most of the girl children, we see them going to community. So I feel that girl children are better [off] only that when they get to secondary school. Maybe in form three or four they are impregnated but still, it's better that they have reached secondary than these boy children. (Teacher, school A)

However, it is striking that it becomes apparent that he expects chances for both boys and girls to be rather low regarding education.

Main Results in a Nutshell

School A stakeholders at the meso and micro level focus on certain groups of students. Our findings indicate that, especially at the meso level, differences in the stakeholders' areas of responsibility lead to some groups being more visible than others. Although various reasons for educational disadvantages were discussed, girls are considered most disadvantaged here as well. This can be explained by the local importance of traditional customs, which challenge formal education, espe-

cially for girls. However, stakeholders at the meso and micro level also discussed an 'oversupply' of support for girls as a point of criticism due to its negative consequences for boys. The existing financial support structures, in particular, were frequently criticized in this regard. Although other dimensions were also considered, educational access was predominantly mentioned when discussing which dimensions impact on others.

3.2 Findings at School B

3.2.1 Meso level Findings: Awareness Depends on Perspectives and Professional Knowledge

Although the concepts of meso-level stakeholders at school B seemed to refer to all groups at risk of experiencing discrimination of any kind, their intervention strategies show an emphasis on children with disabilities. In contrast to the rural school, meso-level stakeholders at school B described intervention concepts with a stronger focus on the dimensions of acceptance and participation.
Their broad understanding of inclusive education was described by the District Social Welfare Officer as follows:

> So within these jobs, we make sure that even education is also within the rights of the child. For example, to say that every child, regardless of sex, background, is able to access education like everybody else. (District Social Welfare Officer, school B)

With regard to implementation strategies, the views of meso-level stakeholders at school B regarding certain groups of students differed according to their specific areas of responsibility (as was also observed at school A). For example, responsibility for early childhood education seemed to broaden their view of inclusive education because categorization seemed to play a minor role in this context.
Furthermore, meso-level stakeholders at school B considered the dimensions of acceptance and participation to be important for achieving the goal of inclusive education. For example, the Desk Officer of Primary Education referred to the participation of children with disabilities as a positive development. Though this comment refers to the dimension of acceptance, it can also be related to participation:

> In the past, the learners with disabilities were excluded from taking part in physical education lessons. They used to be told that 'You will remain here and you will watch over your friends' property', something like that. But not today. Now, they are given relevant exercises for them to do. So that's another level of acceptance apart from sensitization. (Desk Officer of Primary Education, school B)

In addition, the District Social Welfare Officer (DSWO) emphasized the importance of full inclusion in terms of acceptance and participation. In this context, the DSWO discussed the importance of professional knowledge as well as barriers to full inclusion caused by a lack of professional knowledge about the diverse needs of students:

> [Regarding] those with disabilities, we encourage them that they should accept these children. We always talk about issues of attitudes; that these should not be there. Those who are not trained on the issues of disabilities handle the children cautiously, like they cannot do anything instead of letting them explore their world. You will find that the teacher is struggling, as if the child cannot do anything, overprotecting the children. We actually saw this in one of the centres where other children went to play and you could see that the child with disability was struggling to touch the ball, and the caregiver told the child that you will not be able to play with the ball, play with this [instead]. So [it is] things like this which mean that in the mind of the caregiver, it was like this one will not be able to do it. For those who know about those children very well, they are able to encourage such children to play. (District Social Welfare Officer, school B)

This quote highlights the important relationship between professional knowledge and the dimension of participation. Meso-level stakeholders at this urban school emphasized that adequate knowledge of how to deal with the heterogeneous needs of students in mainstream classrooms is needed for full participation.
With regard to enhancing professional knowledge, the District Education Manager described a broad range of strategies to implement inclusive education. She emphasized continuous professional development for teachers during school holidays as well as collaboration (see section 4.2) with Parent-Teacher-Associations to plan sensitization programmes for the community as important keys to increasing the acceptance of formal education (see section 4.3).

3.2.2 Micro Level Findings (School B): Ambivalence Indicates an 'In-between State'

Most of the micro-level respondents at school B showed a broader concept of inclusive education regarding who should be addressed in inclusive education. They described different student groups, including girls, orphans, and children affected with HIV/AIDS, and the problems they face in particular. Despite this broad understanding, interventions at this urban school predominantly focus on children with disabilities. With regard to human resources, teaching and learning materials and technical equipment, school B provides environmental support that specifically meets the needs of only some students with disabilities. As mentioned before, school B has a resource centre and a special education teacher. Similarly to stakeholders at the meso level, the micro-level stakeholders addressed issues involving the dimension of access as well as the dimensions of acceptance and participation.

With regard to inclusive education, a member of the School Management Committee referred to children with disabilities in particular, but also mentioned other children who are disadvantaged in other respects:

> Inclusive education is the kind of education in which we mix different learners, such as the physically challenged, those who head households, those from poor families, those with hearing impairments, and those with visual impairments. All these [children] learn together. (School Management Committee member, school B)

The teacher quoted below hinted that inclusive education was a positive development. Referring specifically to the dimension of access, he explained that this step has been rather successful as various groups of children are now represented within the classroom:

> Nowadays it is a high percentage because most of the learners we teach in class are orphans, street kids and some with disabilities. You should have come long time ago, those with disabilities were not there, and orphans were not there. Now it is a high percentage because we can say these non-governmental organizations, some of the groups in the villages, they are the ones patrolling the villages and bring those kids to schools. Maybe we can say [about] their performance some of them perform high, some low according to the environment in which they are. (Teachers, school B)

Another teacher affirmed this statement, explaining that the situation at this urban school cannot be taken for granted. He stated that other schools still refuse children with disabilities, which can be a problem for parents because it may lead to them travelling longer distances to take their children to school. The teacher's comment presented above also shows that new areas of emphasis arise now that educational access has improved for children. He explains that differences and therefore challenges are apparent with regard to performance and participation in class.

In this context, teachers at school B discussed the importance of teaching methods, especially with regard to raising acceptance and participation within the classroom. The teacher quoted below referred to the needs of various students:

> You have to vary the method of teaching for all the learners to adopt it, even infants, when teaching because those learners are different in learning. Some of them they are talented, some of them are gifted, and some of them they are not. So the method of teaching itself should vary to suit all the students. Even because of the challenges they go through so varying the methods help them to interact freely with all other learners. Yes, for example, as we have said, some are poor, some are physically challenged, some are HIV-positive; so many reasons. So when we vary methods of teaching, for example, group work helps them to interact freely so that that issue of stigmatizing [is] by and by slowing, yes. (Teacher, school B)

The ideas expressed here refer to the sensitivity and knowledge teachers have with regard to the diverse learning needs of their students. This also indicates that teachers at this urban school are highly aware of their own role regarding inclusive education. However, this description challenges a broad understanding of inclusive education, and the diverse learning needs of the students seem to be understood as individualized and qualitatively different and therefore in need of teaching strategies that are uniquely tailored to the needs of the individual. Hence, this refers to a medical model approach to disability, as confirmed in some of the statements by the head teacher.

This ambivalent perspective of the teachers corresponds with findings at the macro level. As has been elaborated in detail in the previous chapter the term 'inclusive education' is rarely used in policy documents, and its conceptualization still seems to be formed by special education. As mentioned earlier, this finding can be interpreted as a current state between inclusive education and special education (see chapter 2.1). This 'in-between' state was also evident at the micro level. This confirms that the realization of inclusive education is a process that needs clearly defined goals and concepts for proper orientation at all levels.

Finally, the focus group discussion with students showed that the challenges identified by students are similar at both schools. For example, they feel that certain challenges are dependent on specific student characteristics. Before we present the results on this topic, we first will focus on how the function of the resource centre is perceived. School B students made conflicting statements regarding the function of the resource centre. One student described the resource room as a separate classroom:

> Interviewer: There are these learners from the resource room. Do you learn with them or are they confined to the resource room?
> Respondent: No, they learn there. It is like they are in their classroom. (Student, standard 7)

Another student explained that it is used to prepare them for inclusion in a regular class:

> If they are doing fine in the resource room, they are taken to the mainstream classes. (Student, standard 7)

However, which group of students is going to be selected is not transparent for all students. When asked which group is selected, this student responded as follows. However, it seems that this non-transparency is no conscious pedagogical strategy.

> Interviewer: You said that the ones who are segregated most are those from the resource centre, which means that there is also another group which is segregated, but very little. Which is this group?

> Respondent: Those who come from poor families and dress shabbily, or maybe they do not wash their uniforms or they do not comb their hair. (Student, standard 7)

Regular attendance is also a problem at school B. Students stated that boys as well as girls are at risk of dropping out of school due to employment. Furthermore, similarly to school A, other groups at school B are also at risk of dropping out due to discrimination at school. Students who cannot afford food or adequate school clothing as well as orphans are likely to be affected by discrimination by their peers. In contrast to the other school, students at school B particularly mentioned a student's social status and/or social background as an important for students gaining friends at school:

> Respondent: Those who are not performing in class are segregated because those good performers do not want to mix with those who do not perform well. (Student, standard 7)

Furthermore, the students stated that students with disabilities also suffer a lack of acceptance.

> Respondent: The ones who are segregated very much are those from the resource centre. (Student, standard 7)

Main Results in a Nutshell

The concepts discussed by school B stakeholders comprise different ideas about inclusive education. On the one hand, the described concepts are broad, which means they refer to all students who are disadvantaged. On the other hand, the concepts of students' needs are partly static and individual-centred. This can be seen as an indicator of an 'in-between' state among stakeholders at the meso and micro level. This corresponds with findings presented in the previous chapter (see chapter 2.1). Students painted a complex picture of this urban school, also referring to challenges facing students with certain characteristics. Moreover, stakeholders at both levels identified strategies which involve not only educational access, but also acceptance and participation. At the micro level, one teacher explained this shift, emphasizing that educational access to this urban school has increased. Consequently, strategies are now needed to improve acceptance and participation[7] within the classroom. Strategies identified at the meso level are holistic and wide-reaching approaches focusing on the enhancement of professional knowledge as well as on collaboration with the community.

7 The meaning of this result regarding the relationship of educational quality and inclusive education will be discussed in more detail in sections 5 and 6.

4 Dimensions of Analysis and Findings: Policy Idealism and School Reality

As described in the previous chapter the international goals related to inclusive education are highly appreciated by national stakeholders in Malawi (see chapter 2.1). However, this leads to additional pressure on countries like Malawi due to the overwhelming economic inequalities the country is struggling with. Accordingly, despite the positive efforts which can be identified at the macro level, the situation in Malawi is still challenging with regard to the implementation of inclusive education.

As has been pointed out in chapter 2.1, concrete and attainable implementation steps as well as clearly defined responsibilities of the various levels and stakeholders are important keys to the successful realization of inclusive education. However, the lack thereof is a major impediment to implementation processes in Malawi. As mentioned in the previous chapter, shortages of resources (financial, material and personnel) are additional problems. As such, they negatively impact the educational system in various regards. While educational access has increased, as confirmed by stakeholders of both schools, the aforementioned aspects challenge the quality of education[8] for all children within the classroom. Our findings show that the dimensions of inclusive education analyzed here are closely related. Therefore, students who experience low acceptance and low participation within the classroom are at a higher risk of dropping out of school. While the majority of student dropouts leave school during standard 1, gender-related reasons for dropout are strongest at the end of primary school: Statistical information on education provided by the Ministry regarding reasons for dropouts[9] showed that students in the urban area (school B) are more likely to finish primary school, and that the dropout rate in the rural area (school A) is around five times higher than that in the urban area (MoEST, 2013). In both areas, family responsibilities are the main reason for both boys and girls dropping out of school. Long distances to school are the main barrier to education for both boys and girls in the rural area, while school fees[10] are the main barrier for boys and girls in the urban area. Additionally, girls in the rural area are much more likely to get married or to get pregnant than those in the urban area (ibid.).

8 As we will elaborate in chapters 4 and 5, we assume that inclusive education and educational quality are closely interrelated. The dimensions of acceptance and participation, in particular, are important indicators of educational quality within the classroom and school (see chapters 4 and 5).

9 Statistical data are available for the two specific areas of both schools.

10 These fees are not defined, however. Although fees for primary education have been abolished since 1994, non-fee-related costs still can be a barrier to education for poor families, as described by Chimombo (2009).

The following section takes a closer look at how those challenges are perceived by the stakeholders. Innovative coping strategies described by various stakeholders will be detailed as well. Here, we also will focus on issues that relate to tensions caused by the idealism of policy on the one hand and the reality of the investigated schools on the other, which we briefly touched upon above.

4.1 Findings at School A

4.1.1 Meso Level Findings: "We Might Be Addressing a Problem That Does Not Exist"

As mentioned before, educational access is a predominant dimension of concern at the meso and micro level. Because educational access still is an issue for several groups, interventions which address this dimension are of relevance. However, as access is closely related to the dimensions of acceptance and participation, aspects that challenge these dimensions impact on educational access as well.

Second, the strong dependence of governmental structures on non-governmental organizations due to a lack of resources was also identified as a major concern. All interviewees described the lack of personnel and learning resources as a main challenge. These deficits lead to a strong dependence of governmental organizational structures on non-governmental organizations and this, in turn, has wide-reaching implications. As has been emphasized regarding the invisibility or visibility of certain groups, the oversupply of non-governmental support for girls was discussed critically by meso-level stakeholders as this leads to neglect of other groups, such as boys (section 3.1).

Regarding strategies of how to implement inclusive education, access proved to be a predominant consideration. Reasons for this vary between the different groups, as explained by the stakeholders. Most challenges with regard to access do not primarily relate to starting school, but rather to maintaining continuous access throughout primary school. An exception must be made here with regard to children with disabilities. They are challenged with regard to educational access understood as starting school as well as continuing and finalizing primary school. Like the quoted District Education Manager explained, his view of inclusive education for children with disabilities especially focuses on increasing educational access for children with disabilities. As the previous quote shows, this is mainly linked to the need to intervene by sensitizing the community. Access in terms of regular attendance is also a challenge for several groups, as discussed by the stakeholders at the meso level. Regular attendance is a challenge for girls, many of whom drop out of school due to early pregnancies and early marriages.

As has been pointed out in section 3.1, many students—boys and girls alike—drop out during first grade (standard 1). This is striking because, since the imple-

mentation of free primary education in Malawi, the number of children who start school has increased, and most children start school in the first grade (MoEST, 2013). In Malawi, boys and girls are equally at risk of leaving school early, as we will elaborate on later. First, we will focus on causes of girls' dropout here. One of the most common gender-related reasons for girls leaving school is marriage. The reasons for this have been discussed already in sections 2.1 and 3.1. Therefore, we will now focus the on stakeholders' intervention strategies. Both readmission policies and parental support groups have been established. In the quote below, the District School Health Nutrition HIV Coordinator emphasizes the importance of support from the mother/father groups.

> As for my office, we formed [mother/father] support and [mother/father] support groups, to help us in encouraging children who have no interest in education or those who went back to school after staying at home, to speak to their friends [about] the goodness of school. We encourage those girls to talk to their friends so that they should be working very hard. (District School Health Nutrition HIV Coordinator, school A)

As will be elaborated on in more detail at the micro level (section 4.2), mother/father groups sensitize female students in an attempt to prevent them dropping out of school or to convince them to continue their school education after becoming a mother.

As explained in the previous chapter as well, Malawi is strongly dependent on such volunteers. The following quote by the District Social Welfare Officer (DSWO) describes established informal structures of collaboration and support:

> Whenever they have got some funds, they ask us to assist them to facilitate the training of case management, child protection, child rights and the like. And even the primary school kids, they are assisted especially when we ask the communities to have Children Corners so that those orphans and vulnerable children can be relaxing, making some recreation, asking each other what they did at school, where they are failing, where they are doing well. (District Social Welfare Officer, school A)

Additionally, the DSWO discussed the specific logic of non-governmental organizations and reflected critically on it, stating that this leads to the neglect of other students. This critical attitude can be found at the macro level as well (refie, 2015). Due to the specific logic i.e. the specific agenda of non-governmental organizations, initiatives are only available to certain groups of students. Consequently, the support may go to students who are not or not longer among the most disadvantaged groups. In the particular example mentioned above, the specificity of intervention is described as problematic with regard to the financial support of boys in secondary education. This example shows that while such additional support structures aim at reducing educational disadvantage they paradoxically create new inequalities. Such paradoxes and contradictions have to be taken seriously

with regard to the development of implementation structures[11]. The question of whether this example is also an indication of a lack of flexibility regarding future interventions also has to be considered. In this context, the District Education Manager expressed that it is essential to put the students' needs first and focus interventions on those needs:

> I think no matter whatever the situation might be, we need to find out first of all from the learners themselves before we can implement anything. Otherwise, we might be addressing a problem that does not exist. So we need to find out first of all what are the needs of vulnerable children. For instance, we have other institutions in the district that have got a keen interest in assisting the vulnerable children. For instance, Campaign for Female Education [non-governmental organization supporting girls] is assisting girl children who have dropped out of the school system because of poverty. and these [girls] are being provided with bursaries for those ones that are in the secondary system. For those ones that are in the primary [school system], they are also being given a safety net grant, which is more intended for the procurement of basic necessities, such as uniforms. (District Education Manager, school A)

The District Education Manager emphasized the need to assess the needs of students in the district carefully as well as to relate the needs to the available resources in order to gain proper insight into the needs not yet served. Moreover, as evident in this quote, non-governmental support structures are regarded as a vital support basis. Hence, these non-governmental support structures turn out to be the essential and fundamental support structures instead of being additional to governmental structures. Our findings show that in the present situation, primary education in Malawi relies heavily on informal structures. Moreover, it runs the risk of creating new patterns of inequality. As a consequence, students' needs are met by the available resources, which are dependent on non-governmental agendas.

4.1.2 Micro Level Findings (School A): High Commitment and Awareness Compensates for Lack of Resources and Contributes to Education Quality

Challenges at the micro level are related to deficits in the areas of teaching, learning and human resources as well as a lack of concrete goals and responsibilities. All participants involved referred to resource-related challenges in terms of infrastructure, learning materials, nutrition and so on. Overcrowded classrooms are also related to a lack of resources. This results in challenging conditions, especially with regard to heterogeneity in classrooms. Examples include age heterogeneity and challenging behaviour of students. Lack of resources is a main obstacle to edu-

11 They also are of importance with regard to a self-reflexive consideration of limitations to advices and recommendations which can be derived (see chapter 5).

cation. However, different students are affected in different ways. As mentioned early, except for children with disabilities, most barriers to educational access are not primarily related to starting school, but to staying in school, i.e., continuous access to primary education. However, barriers to regular attendance are closely related to the dimensions of acceptance and participation.

With regard to the relationship between regular attendance and other dimensions, lack of acceptance by peers was mentioned as one reason why some students do not continue with their formal education. This is a problem not only for students with disabilities, but also and especially for orphans, as was already pointed out by a stakeholder at the meso level. A lack of acceptance by schoolmates also impacts on the dimension of participation. The teachers are aware of this problem and try to respond to it by using specific teaching methods (see below).

With regard to the relationship between regular attendance and other dimensions, the interviewed stakeholders view traditional cultural orientations as competing with formal education. According to most stakeholders, familial attitudes towards formal education are some of the main barriers not only to educational access but also to children's participation in school. In this respect stakeholders stated refer to the important role which traditional initiation ceremonies play in this area. As indicated by these individuals, participation in traditional initiations is major barrier to school participation for both girls and boys. According to teachers, boys' behaviour after such rituals is a particular problem. Teachers then notice a change in children's attitudes towards school and behaviour, especially towards teachers:

> Other beliefs are that when children go for traditional initiation ceremony, they are told they are adults. So we meet problems that when that child comes to school and we have rebuked him or her for bad behaviour, you find his parents coming and shouting at us as on why we had to rebuke their child, maybe up to the extent of calling him brother. So such beliefs affect children because they develop that feeling that they are adults and a teacher cannot do anything to them. (Teacher, school A)

A member of a mother/father group similarly describes a change in attitude and behaviour of girls after attending traditional initiation ceremonies. She also described their negative effect on participation within school. Reasons for this were discussed with regard to a changed content of such ceremonies:

> What I see is that after these girls have come from the traditional initiation ceremonies, they tend to change their habits for bad instead of being good. We as parents are surprised too because these days, traditional initiation ceremonies changed their ways of advising the young girls. But the girls themselves, they feel elevated. Now that I have been initiated, then I am fully grown up, I can do anything with any man. With that mentality, they do not listen to anybody. (Mother/father group member, school A)

The class teachers as well as the head teacher of the school invest a lot of personal time and effort to deal with these challenges despite inadequate conditions. However, the teachers stated that students' negative behaviours in their classes and negative attitudes towards school were a major challenge for their work. They expressed the need for strategies to protect their authority within class. This need is closely associated with a lack of support in teachers' daily work in terms of personnel and material resources as well as continuous professional development. With regard to the described challenges, stakeholders at the micro level discussed strategies to enhance regular attendance among girls who leave school due to early pregnancy and/or marriage. As on the meso level, these stakeholders described the importance of the school's readmission policy. The mother/father groups play a major role in intervening and supporting readmission. They advise and support girls in school as well as those who have dropped out. A member of the mother/father group described the establishment of the groups. She explained that they were established due to the observed need for intervention by group members in collaboration with the group village headman:

> Our main aim to start this group? After observing that many youths are not going further with their education, we sat down discussing on what we could do since we are also girls who did not go further with education due to other reasons. We mobilized ourselves in the village with the help of the village headman and discussed with the head teacher to establish this group of [mothers/father] to encourage girls to come to school, including those who dropped out. (Mother/father group member, school A)

One mother/father group explained how they work. They mentioned that they try to find role models and negative examples to convince girls in and out of school to continue with their education. In the following example, a member of a mother/father group explains how they deal with girls who are not willing to listen to their advice. They attempt to stay aware of the girls' decisions and actions and to intervene as soon as the girls are willing to be addressed again:

> When we find that there is another girl who does not comply with our appeal, we leave her for a moment but still monitoring her, because we know that she is behaving that way because of the man who is cheating on her to say he will marry her. But when she has a child, you find that the man runs away, leaving her in problems. This time is when we go back to her, reminding her of our advice, give her several examples of other girls who had listened to our advice. By doing that, we try to bring her to her senses. Having faced so many challenges in her life with the baby, she agrees to go back to school. And we also help by talking to the parents to assist in caring for the baby. (Mother/father group member, school A)

The high ideals and high commitment of stakeholders, particularly teachers, revealed high attention to students' individual situations and needs. This became

apparent when the teachers described the various strategies they use to support individual students:

> In class, there are a lot of children, and when the teacher is teaching, there is a time limit. That's why I found a chance of telling him that when he knocks off, he should be coming to my class. During that time, we stay close and also I teach slowly and give him a chance to explain what he can manage on what I have taught. So where he has failed I repeat several times. This cannot happen in him class because it is difficult for a teacher to be repeating a point for several times to one child. So I take such kinds of children. Even in my class, there are some who have difficulties with reading; some are slow learners. When they knock off at 11:20am, I try to be with them for at least thirty minutes, helping them in areas of weakness at ease, without considering time that is prescribed by the government. In this way, some of them are showing an improvement. (Teacher, school A)

Again, this is related to the challenge of dealing with overcrowded classrooms. Teachers at this rural school have 70 students on average in their classrooms (see section 2). Moreover, the teachers and head teacher described strategies they use to deal with students' diverse educational needs in order to increase acceptance as well as participation. Mixed seating plans are one strategy to improve acceptance. Further strategies are group work and 'learner-centred methods', though they were not explained in detail by the teachers.

Finally, focus group discussions with various groups of children gave us insight into the subjective school experiences of students. In this regard, students' perspectives gain insight into their experience of being 'recognized'. The students confirmed the teachers' efforts to promote acceptance and participation in the classroom. For example, female students, orphaned students and children with disabilities participating in a focus group discussion also stated that the teachers repeated the contents of lessons for them.

> Interviewer: Now when you are learning in class, do you feel that teachers support you when you need help to understand the lesson?
> Respondent: Yes, they do.
> Interviewer: How do they support you? What do they do to support you to learn well?
> Respondent: They teach well for one to understand what is being taught.
> Interviewer: What else? How do teachers support us?
> Respondent: After teaching, they ask us questions one by one, to help us understand the concepts. (Orphans and vulnerable learners, school A)

Moreover, most students, girls, children with disabilities and orphans explained that they liked school most of the time.

> I like reading and writing and also playing with friends. And during break, I also read what we just learnt in class. (Student with disabilities, school A)

However, children with disabilities and orphans described experiences of discrimination by their classmates:

> Other problems are that some people mock me [and say] that I am weak; then I remain quiet and others laugh at me. (Student with disabilities, school A)

> They [classmates] say I stammer when speaking and waste a lot of time to say a few words and they don't like it. (OVC student, school A)

Girls confirmed that this lack of acceptance was a challenge, especially for orphans. They also explained that they show less acceptance towards fellow girl students who are pregnant or are in relationship with a boy.

Main Results in a Nutshell

The lack of adequate financial, human and material resources is a predominant problem at the meso as well as micro level. Consequently, non-governmental organizations at the meso level are a natural and necessary source of additional resources in addition to governmental grants. The interviewed stakeholders have established routines in collaborating with those organizations and seem to have established equal partnerships with such organizations. However, because of the specific logic which underlies non-governmental organizations, they also question such informal structures. This underlying logic was also discussed in the previous section (see section 2.1).

Especially at micro-level, all stakeholders interviewed clearly showed a high commitment to formal education and the diverse educational needs of students. For example, teachers invest additional time to provide learning support and have a high awareness of the individual needs of students. Parent support groups have been organized to support the school through initiatives such as feeding programmes. Despite the overwhelming challenges identified, ongoing efforts to bring about change in local communities are increasing educational access as well as educational quality within the classroom, as was also confirmed by students.

4.2 Findings at School B

4.2.1 Meso Level Findings: Dealing with Inadequate Resources by Innovative Implementation Strategies and Using the Concept of Inclusion to Critically Rethink Existing Structures of Selection and Stratification

Meso-level stakeholders at school B stated that challenges exist in various areas. However, innovative strategies to overcoming these challenges have become ap-

parent. According to the District Desk Officer of Primary Education, one of the main causes is reliance on additional donors due to a lack of resources:

> As a district, we still look forward to having other well-wishers to assist us in this endeavour. You know, special needs resources are very expensive, so using the funding from the ministry alone is not adequate. So our request is to the well-wishers should also help us in this venture. (Desk Officer for Primary Education, school B)

With respect to the inadequacy of resources, the District Education Manager referred to the limitation of responsibility as well as the need to redistribute responsibilities. Here, she described the huge problems facing students in terms of covering basic needs as a major challenge to formal education. Furthermore, she discussed limitations of responsibilities by stakeholders of the education system at the meso and micro level, considering the huge problems students face. Moreover, she referred to the need for support by the community.

> I don't think we can reach out to that extent. So it's like maybe they [students] would only be referred to [the] Parent-Teacher-Association and some groups in the community to assist them. But it also depends on the communities, where they are willing to take up that kind of challenge to assist them. So that affects the attendance in school despite the fact that they would give them whatever needs they have in schools. They would give them notebooks, but I think [if] some basic needs at home are not met, then it will be difficult for them to attend school. (District Education Manager, school B)

However, the District Education Manager described a range of innovative strategies used to address the challenges referred to above. She emphasized the importance of collaboration in order to compensate for the lack of resources. According to the District Education Manager, different groups with parental involvement (such as the School Management Committees, Parent-Teacher Associations and mother/father groups) are equal and indispensable partners needed to run schools satisfactorily.

> In the area of community participation, first of all, in all our schools we ensure that we have school management committees, PTAs [Parent Teacher Associations] that assist in the running of the schools. We also have [mother/father] groups, which are there to specifically woo girls into schools. So during these trainings, we carry our sensitizations with the [mother/father] groups, the PTAs regarding their roles and, in case of the [mother/father] groups, how they can woo girls into schools. (District Education Manager, school B)

The District Education Manager explained that they build upon the strategy of sensitization through these organizations led by parents. They aim at enhancing community acceptance of the value of formal education for children with disabilities. Additionally, so called Counselling and Guidance Committees are installed

to support students where possible and to ensure access, acceptance and participation. The District Social Welfare Officer also referred to a network of various partners they can receive support from.

On the subject of the support by the government, the District Education Manager described a positive development in this regard. She explained the decentralization strategy of the Ministry of Education in cooperation with United States Agency for International Development.

> I feel it is a positive development because previously, schools used to depend on whatever resources they would collect from the learners, the rental of the buildings and the like. They never used to be any funds going into schools. But since then, for a third year now, we have funds going directly to the schools and we feel that that is helping a lot, because the schools are now able to meet their needs, plan on their own, and be able to implement their own activities within the schools. (District Education Manager, school B)

Although the financial resources still are not adequate, the strategy seems to be to support adaptive strategies and to address the most obvious needs and challenges. Moreover, the District Education Manager referred to the school improvement grant, which she uses to implement strategies to develop educational quality. This will be explained in more detail below.

As has been explained above, strategies to support teachers in their teaching practices are predominant. The District Education Office aims to develop and implement various strategies to support teachers. While some involve the provision of material resources such as learning materials as well as infrastructural improvements at the schools, others comprise the continuous professional development of teachers, as explained below:

> Every holiday, we conduct continuous professional development for our teachers. That is zonal based as well as school-based. I think you are aware that the Ministry of Education is now providing grants to schools, zones and districts, and we are making use of those grants to conduct some training in the schools. So we pick an area where we feel [that] maybe the teachers are not doing well or the learners are not doing well, and then we conduct trainings in those particular areas. (District Education Manager, school B)

The District Education Manager stated that they support regular teachers as well as special education teachers. However, she explained that they have to set priorities due to a lack of resources. For example, continuous professional development in educating children with disabilities only addresses special education teachers due to limited resources. However, the special education teachers share the knowledge learned in training with other teachers at their schools and, thus, act as multipliers in their schools.

> Basically, due to limited resources, we normally gather the specialist teachers almost every day where they would meet and share the knowledge and experiences. And we entrust them to go and sensitize regular teachers in their respective schools. Once every term, we meet with these specialist teachers to look at a specific area in terms of sensitization or continuous professional development, and then we entrust them that they should also do the same when they go to their schools. (District Education Manager, school B)

Finally, the District Education Manager discussed specific barriers to inclusive education. While the barriers mentioned before predominantly address the relationship between inclusive education and special education as well as the question of full inclusion, she emphasized that present structures of selection and stratification have to be reduced. In the statement below, she criticizes the way in which the Malawi National Examination Board conducts national public examinations at primary and secondary schools and emphasizes the need to be more adaptive to students with special needs in examination situations:

> There should be a method that, when we identify a learner with special needs, [the] Malawi National Examination Board should find their own way of assessing these learners another different way of assessing these learners so that they should find the actual capability of learners. But otherwise, what we are getting here is yes, they are assessed just like any other student, but these ones have got difficulties. Come examination time, they are only given an allowance of twenty extra minutes, which is not enough. It depends on the kind of disability. Maybe [it is for] those with low vision but not [for] the extreme case that I am talking about. She might need even the whole day to write the paper. But would Malawi National Examination Board allow that? They will not. Will Malawi National Examination Board allow somebody to write for them? They would not. (District Education Manager, school B)

Such examinations aim at ensuring education quality by creating objective and equal conditions for all students. Hence, situations like this are developed to objectively measure student outcomes. With it, they are created to select students—in the case of students with high outcomes, to grant them access to opportunities of higher education, but also to deny higher education to students with lower outcomes. This stakeholder criticized the logic of selection and stratification which underlies such exams in terms of its ability to promote inclusive education. She emphasized the need to consider students with special needs in order to create equal conditions for all students. Hence, she touches on the complex relationship between inclusive education and issues related to equity and social justice while implying the need to reconceptualize the relationship between the principles of 'ideal' inclusive education and the role of formal education within a society (see chapters 4 and 5).

4.2.2 Micro Level (School B): Resource Centres as Focal Points of a Process Towards Inclusive Education—"I Would Have Loved it if the Resource Centres Just to Be an Entry Point"

School B has a resource centre and a special education teacher, which is rare in schools in Malawi. It also has a vocational training centre, which is financed by a non-governmental organization and led by the School Management Committee. The head teacher explained that this is unique in this area. However, the stakeholders complained that personnel and material resources still are not adequate. Moreover, as has been emphasized before, the school is on a continuous development curve towards inclusive education (see section 4.1.2). This process is characterized by ambiguities and tensions arising from diverse interpretations of the concept of inclusive education by different stakeholders. Moreover, this refers to a pragmatic dimension of implementation.

The function of the resource centre was a topic of intense discussion among various micro-level stakeholders at school B. Although innovative ideas and clear goals already exist at the meso level with regard to implementation processes, several ambiguities and tensions are evident at the micro level. With regard to students with disabilities, some stakeholders referred to the need to enable these children access to regular classes in mainstream schools. According to the School Management Committee, the function of the resource centre is primarily to prepare students with disabilities to be "integrated in the mainstream classrooms". In the same sense, the head teachers' statement can be interpreted as meaning: "We allow all students to attend classes at this school". This is confirmed by other stakeholders as well. However, based on following statement by the School Management Committee, the strategy of integrating students with disabilities in regular classes still seems to be less adaptive:

> The learners who are there learn from Monday to Thursday, but on Friday the learners are integrated in the mainstream classrooms. So from the beginning, it seems there have not been problems with the special needs learners interact well with the regular learners. (School Management Committee, school B)

This also demonstrates that access for students with disabilities is still an issue that needs mentioning and clarification and still is not something unquestioned. Indeed, as has been shown previously, the stakeholders referred to recent changes and emphasized that the situation at school B is still in an early stage of development. According to teachers at this urban school, the recent increase access to education has to be regarded as a success (see section 4.2.1).

Especially the special education teacher seemed to be much more critical about this practice referred to by a member of the School Management Committee. He

questioned if this practice is fully inclusive and explained his concept of a resource centre:

> I also suggest that disadvantaged learners should not spend all their time in the resource room, but they should be there for a short time and be taken to the mainstream [classroom]. So I would have loved it if the resource centres just to be an entry point, just for us to find out the learner's problem and take him or her to the mainstream. I feel when they are kept here full-time, inclusive education will not be achieved. We need them be mixed with the regular learners, play together and specialist teachers help them while in the mainstream. (Special education teacher, school B)

The special education teacher's reference to a lack of resources is in line with similar views expressed at the meso level. In particular, when referring to the lack of human resources, he emphasized that the schools need at least three special education teachers. The special education teacher also confirmed the District Education Manager's statements about her task of raising awareness among her colleagues. He stated that he started sensitizing the head teacher at first when he began working at this school. In the above quote, he refers to the 'in-between' state, identifying the lack of resources as a barrier regarding the realization of inclusive education at this urban school. Moreover, it is apparent that he believes that the role of the resource centre and the way in which its role is understood by his colleagues should be aligned with a broader approach to the implementation of inclusive education.

Ambiguities and contradictions can also be found with regard to teachers' attitudes and roles. The regular teachers expressed scepticism regarding their efficacy in meeting the needs of children with disabilities. Due to a lack of resources and overcrowded classrooms, teachers depend on students' abilities to receive attention. In this respect, the concept of inclusive education was viewed critically by these educators:

> Most of the times, special needs learners may just copy what is on the board. For example, in math, he can just copy without solving them, brings his exercises to us and asks, 'Madam, what can I do here'? We tell them how to do it. If he has an interest, he goes solve the math and I mark him. Some have the courage to ask and they do well, even better than the regular learners, because they have an interest. In standard two, we have some who have just come from there and they are doing well. We now know what to do with them from this stage to the next. We can tell that today things are not okay. (Teacher, school B)

Conversely, this means that students who are quiet and are not able to get attention are at risk of being excluded from participation. This was confirmed by the teacher quoted below, who stated that, due to a lack of adequate resources, meth-

ods and knowledge, students who are quiet or who have needs that require specific knowledge are at risk of simply "passing time" in the classroom:

> I don't think all teachers will accept to have these kids in our classrooms. That is denial. What am I going to do with this kid? How am I going to teach this one? Another problem is that we don't have the skills on how to teach these children. Therefore, when their teachers are not around and they ask us to get these learners in our classrooms we just keep them, while the special needs teacher knows how to handle them. The special needs teachers were trained and we did not undergo that training. We just keep them in our classes to pass time. (Teacher, school B)

Accordingly, specific limitations to the implementation of inclusive education are identified in these statements. Teachers mention limitations concerning teachers' willingness to include students with disabilities in the classroom as well as limitations concerning students' characteristics which, for different reasons mentioned before, cannot be handled adequately in the regular classroom setting.
However, stakeholders at the meso level, especially the District Education Office, emphasized the importance of continuous professional development. The teacher quoted below refers to a special needs training course he had just begun and describes his remaining insecurities and the need for more specific knowledge to properly address the diverse needs of the students:

> However, I am doing the special needs training, but have just begun. We were told to accept special needs learners but, assuming you are receiving visitors at your home, you need to prepare for them. But when you think that I have nothing to give to the visitor, you find it hard. So it is the same with these children. We have nothing to give to them. As a result, they do not enjoy. I think that is why she said 'special needs course'. We treat them differently, though. (Teacher, school B)

Finally, the Vocational Training Centre is another important innovative strategy mentioned by the head teacher of school B. In the quote below, the head teacher explains that its establishment is rooted in the observation that there is a need to create alternatives to formal education for some students.

> We have also discovered that some learners who are physically challenged have some other problems; they could not proceed with education. And we have tried to introduce what we call the 'Vocational Training Centre' at this school. We are trying to teach these learners tailoring so that when they grow up they have something to be doing since we have seen that there are really some who cannot go further with education. (Head teacher, school B)

As Malawi is characterized by a high percentage of subsistence farmers, the establishment of a vocational training centre can be considered a necessary alternative to continuing with formal education. However, this hints at the need to be sensi-

tive to the potentials and personal goals of the individual student. According to the head teacher, this provides opportunities for students who are not expected to proceed with formal education. However, critical factors have to be considered, especially how students are assigned to the Vocational Training Centre, e.g., if a student's perspectives, interests and motives are considered in this process, have to be discussed. Such consideration is necessary because the Vocational Training Centre might otherwise turn into a new structure of selection and stratification.

Main Results in a Nutshell

This case study revealed that innovative strategies to compensate for the lack of resources are predominant across all levels. At the meso level, several key issues were identified which can be understood as supporting the implementation of inclusive education despite high expectations and low resources. Decentralization strategies are emphasized as an important governmental strategy to implement inclusive education. School improvement grants allow stakeholders in the District Education Office to be more pro-active and adaptive towards challenges identified on the micro level. Moreover, the District Education Manager described two key aspects in building implementation strategies. First, she referred to multiple facets of continuous professional development for both regular teachers and special education teachers, as well as strategies to maximize such initiatives with the help of multipliers. Secondly, she described collaboration as a positive strategy to deal with challenges in the implementation of inclusive education.

Remarkable efforts at the meso level seem to reflect intense processes of negotiation and implementation at the micro level, although ambiguities and paradoxes regarding concepts of inclusive education and strategies of implementation have been identified. The insecurities expressed reveal a high level of commitment and high ideals of practice. For example, teachers voiced uncertainty regarding their own sense of self-efficacy in dealing with diverse educational needs in the classroom. These high ideals conflict with the need for further continuous professional development described by teachers.

5 Dimensions of Analysis and Findings: Traditional Orientations versus Formal Education

In Malawi, formal education plays an ambiguous role, which is reflected in the current labour market situation. This was discussed already in some detail in the previous section. Although the majority of the labour force[12] is economically ac-

12 The statistics vary depending on whether they refer to labour force or working age group (which is defined according to age between 15 and 64 years). According to the framework presented here,

tive (around 80 %), most of these individuals are engaged in agriculture, forestry and fishery (45 %). A small minority (around 4 %) of Malawians have professional positions which require a tertiary degree (e.g., managers and professionals)[13]. Furthermore, the majority (64 %) of Malawians have no formal school certificate. 23.7 % of the total population has a primary education certificate, and only 2.9 % a tertiary education degree (National Statistical Office, 2014).

Additionally, there is a notable difference in education levels between rural and urban residents. 39.4 % of the urban population has no formal education level compared to 67.6 % of the rural population. 10.3 % of the urban population has a tertiary education degree compared to only 1.8 % of the rural population (ibid.). A considerable proportion of the population of Malawi is engaged in subsistence agriculture, i.e. self-sufficiency farming (ibid.). According to the Labour Force Framework (LFF), this group is statistically classified as unemployed because they do not receive salaries (ibid.).

Moreover, the population of Malawi is characterized by diversity. Many ethnic groups and languages are represented in various areas of the country which is also reflected in both schools presented here (see section 2). The customs of different ethnic groups are an important aspect of life in rural areas. Accordingly, traditional orientations are especially important for communities and families in rural areas and play a relevant role in students' lives. Due to the multitude of ethnic groups and traditional orientations, customs and orientations are locally specific, so broad variation can be observed between different parts of the country. This has to be emphasized here. As a consequence, the roles of formal education and traditional orientations must be regarded as locally specific. Our findings with regard to such roles in two contrasting cases are presented in the following sections.

5.1 Findings at School A

5.1.1 Meso Level Findings: Traditional Orientations Manifest in Local Customs but Also Reflect Global Inequalities

According to stakeholders at both levels in this rural school, traditional values compete with formal education. Their impacts on education affect girls, in particular, but also other children. One stakeholder summed up the situation as follows: "The culture is not assisting us" (District Social Welfare Officer, school A). The competing relationship between traditional orientations and formal education can be regarded as related to access to school. Most of the children start

both concepts are defined identically, but the statistics vary (National Statistical Office, 2014). The lower statistical estimate is used here and is expressed as a round figure.

13 No precise definition of what is meant by the term 'professionals' was given (ibid.)

school, but many drop out afterwards. Therefore, educational access in this case must be understood in the broader sense of continued access to school.
Traditional orientations relevant to the education of girls as well as boys are manifested in traditional initiations. As early marriage and early pregnancy can follow such ceremonies, they affect the educational access of girls in particular. Stakeholders expressed the opinion that such traditional initiation ceremonies are deeply rooted within the communities in these remote areas. District Social Welfare Officer stated that all groups of children are affected by traditional orientations. He emphasized that such cultural influence is a vivid community factor that shapes students' formal education apart from the family background. He emphasized, "not only orphans" are affected by such traditional orientations, also other children "whose parents are intact" (District Social Welfare Officer, school A).
However, formal education is affected by other factors as well. Traditional orientations include but are not limited to traditional initiations. Traditional concepts of childhood and gender-related role expectations are other relevant factors here because they are related to global socio-economic inequalities and poverty struggles. The following quote illustrates the problem well:

> I think, to us as a district, I think we can lament of girls being so vulnerable in that particular area because whenever the parents have got few resources to send the kids to school, most of them (inaudible) prefer to send a boy child to school rather than a girl child. (District Social Welfare Officer, school A)

5.1.2 Micro Level (School A): Perspectives on Integrating Traditional Orientations and Sensitizing Regarding Formal Education

Similar to the meso level, micro-level stakeholders at school A stated that traditional orientations negatively affect the children's formal education. Local customs play a major role within families and communities and compete with formal education (see section 4.3). Stakeholders at the micro level discussed the important relationship between familial attitudes towards formal education and a student's school success. As shown in the following quotes, various micro-level stakeholders emphasize the importance of a positive familial attitude towards school for a child's school success. In other words, children need encouragement and support from their parents and guardians in order to do well in school.
The head teacher of school A explained how negative parental attitudes towards formal schooling impact on children with disabilities. As mentioned above, positive familial attitudes toward school play a major role with regard to learners' school success. Teachers described student behaviour which they feel is related to parental attitudes toward school. One teacher stated:

> There are some children, when they are coming from home, they have attitude to say 'A teacher cannot do anything to me', because they know that if they go home and report that they were given punishment, their parents will come to shout at the teacher, up to an extent of wanting to fight the teacher, without asking on what happened. But they should understand that when their child has come to school, he or she is under the teacher and that the teacher follows the rules and regulations, that the child should learn properly and also should not disturb others from learning too. So parents should know that. (Teacher, school A)

A member of the mother/father group at school A referred to the relationship between family background and school success in general. He pointed out that support from the family and positive role models within the family are important keys for a child to be successful in his or her school career:

> I am a [name of ethnic group] by tribe and what I see as the main reasons why many children do not go to school in this [name of ethnic group] region is that most of the parents are not educated. Here is the problem: When a parent is not educated, it is difficult for a child to go to school because there is no one to push him or her to school, and even the children underrate their parents because they know their parents are not educated and do not know anything about education, unless there is someone educated who can encourage the children to go to school and push them every morning. (Mother/father group member, school A)

School A stakeholders also described negative examples in this respect. They explained that parents and guardians with negative attitudes toward formal education discourage their children from attending school and force them to work or marry instead.

> But that problem mainly comes from parents because they do that when they see that their child has grown up and they let him do that to help them source money for food at home. They feel that when that child goes to school, he will be delayed hence, the child is discouraged [from going to school]. (Teachers, school A)

As emphasized before, girls were mentioned as one group which is especially disadvantaged in this respect due to early marriage and early pregnancy. They participate in traditional initiation ceremonies, the negative effects of which were mentioned above. Moreover, arranged marriages are "very common in this area" (teacher, school A).

Members of the mother groups, in particular, referred to their own experiences and revealed insights into the content of these rituals and their mental and emotional impact on girls. Because most of the mothers have experienced such ceremonies themselves, they also are able to reflect on the historical development of the ceremonies over time. Today, girls are subjected to such practices at a younger age than their mothers. According to the mothers, one reason why girls drop out

of school is because they were too young to deal adequately with these ceremonies on an emotional level. Female students also described the contents of the ceremonies, emphasizing that the values mediated there have nothing to do with formal education: "They say nothing about school; they just talk of traditional morals." (Female students, school A).

Additionally, not only girls but also boys participate in such traditional initiation ceremonies. Although this does not impact on their educational access as strongly as it does for girls, boys are still affected. School A teachers explained that boys show less respect after attending traditional initiations. This not only affects their participation within class, but also places them at a higher risk of dropping out of school. Furthermore, the teachers reported that they have regular conflicts with the boys. Due to a lack of resources and high pressure, teachers use traditional punishment strategies to assert their authority in the classroom.

However, stakeholders at all levels referred to the importance of traditional cultural orientations, including conceptions of childhood. Children play a major role in family life and have responsibilities within the family, not only in families headed by minors. Stakeholders explained that some boys go to work instead of attending school. Thus, work may sometimes compete with formal education. Poverty issues aggravate the situation in many families. According to one father, economic inequality is a major reason for the vicious circle affecting girls. He pointed out that girls drop out of school as a consequence of poverty—a global phenomenon which challenges most families in this district of Malawi and affects the education of not only girls but also boys.

> Mostly, it is due to poverty. You find that when the girls get married early, they have children early and yet they have no support. And when their children grow up, they face challenges and also end up getting married early for the man to support her. (Mother/father group member, school A)

In this regard, stakeholders described their sensitization strategies. Members of the mother groups explained, that they counsel girls at school by speaking about their own negative experiences, among other things:

> We also advise fellow girls by visiting their classrooms and advise them to work hard in class and avoid getting in love relationships because it can lead to them getting pregnant. And we tell them [about] our own experiences, for example, saying, 'Look at us. Of course we reached form four but ended up getting pregnant, so you should not do that.' (Mother group member, school A)

After girls drop out of school, the mothers also visit them at home and encourage the girls to return to school. This is a strategy to ensure that readmission policies are implemented. The head teacher described the success with regard to girls attending school again after giving birth to a child. It is also important for children

to have role models. The use of role models as an education promotion strategy was mentioned by several stakeholders. For example, a member of the mothers group who dropped out of school and hence did not finish school now tells girls at school about her experiences and encourages them to continue their education. Other important sensitization strategies address families. While this is important with respect to the formal education of girls, sensitizing families concerning the value of formal education is relevant for all children. According to the head teacher, this applies to children with disabilities in particular.

> The challenges that are there are it is due to lack of civic education for some parents, who need to change their mind on sending their disabled children to school because there are some who have done well in education. I remember when I was in primary school, we had [name of a student], but this person died. He was the first visually impaired graduate in [name of city] at [name of college] and had a picture together with [name]. This is where I learnt that the disabled can do it. People just think that the disabled are not able and cannot do anything. If parents were shown pictures of people like him during meetings, they can be convinced that this is true and real. (Head teacher, school A)

As explained above, stakeholders referred to global socio-economic inequalities and poverty as factors which impact negatively on the perceived value of formal education. Furthermore, the teacher quoted below explained that formal education can be understood as a relatively new phenomenon in Malawian culture. Therefore, the acceptance of formal education still has to grow:

> I can say that all groups, because it seems it is coming from culture. The issue of education seems to be coming as a new thing in this area. So people still have a picture of how they were doing things a long time ago, then try to implement it even now. So it is not that this is from a poor family or from a better family, or boy or girl. It is just that what was happening in the past is being passed on to the present generation that such marriages are happening. (Teacher, school A)

The parents described important strategies to integrate traditional orientations and formal education. They explained strategies to maintain traditional initiation ceremonies while changing these customs slightly.

> Respondent 1: We just invite those who [are] advisors [Nankugwi[14]] only for a day to advise our girls. We do this only to older girls because they are ready for marriage, and sometimes I advise them because if we send them to traditional initiation ceremonies, they are given to a man, called fisi[15].

14 "Nankungwi is a female traditional initiation counselor" (Jimmy-Gama, 2009, p. x).

15 Fisi or litunu is a man "organized to have first sexual intercourse with a girl after commencement of menstruation or following traditional initiation rite as a symbol of maturity" (Jimmy-Gama, 2009, p. x).

This is a bad tradition and it has to be abolished.

Respondent 2: Like for us Ngonis, we advise them on their behaviour, and this is not done in the bush. For now, I as an old woman with grandchildren, just invite the girls and counsel them at the house. But when they go to the traditional initiation ceremonies, they come out with bad behaviour. When they are there, they are told to bring a man to come and have sex with them to cleanse. Like [an] old man like him would be taken to do the process with young girls.

Respondent 3: It is true what she is saying. They are happening.

Respondent 4: In our Ngoni culture, we advise the grown up and mature children.

(Parents of Students with Disabilities, school A)

Main Results in a Nutshell

According to different stakeholders at school A, traditional orientations are predominant and compete with formal education. Familial attitudes are relevant in this respect because families either encourage or discourage their children to attend school. Furthermore, traditional cultural orientations are reflected in traditional initiation ceremonies. Such ceremonies affect boys as well as girls, but they have a greater impact on girls regarding access to formal education. Furthermore, it must be emphasized that traditional orientations affect all children for various reasons. These impacts are aggravated, among other things, by global socioeconomic inequalities which shape the situation of families in this region. The stakeholders also referred to the relationship between traditional orientations and formal education as a process. So respondents stated that they observe a change regarding this relationship. There is a growing acceptance of formal education within the community. Finally, stakeholders described sensitization strategies designed to support formal education and explained opportunities to achieve the integration of traditional orientations and formal education.

5.2 Findings at School B

5.2.1 Meso Level Findings: Realistic Future Perspectives Are Important to Increase Attitudes Toward Formal Education

The importance of traditional orientations and their competing relationship with formal education was also mentioned by meso-level stakeholders at school B. While traditional initiation ceremonies were not mentioned as challenges, these stakeholders referred to poverty issues facing families in their area. Some reported that families send their children to school to become functionally literate so that they can go to work. Although educational access has increased, many families still place little value on formal education. Therefore, according to the stakeholders, there is a need for sensitization.

Stakeholders at school B also said that collaboration with the community is of great importance. Mother/father groups and other parental organizations support the school in several ways. The stakeholders explained the importance of sensitizing the community parents and guardians regarding issues relevant to educational access. While this was discussed more with regard to girls and less with regard to children with disabilities, there was still a strong emphasis on children with disabilities.

The District Officer for Primary Education explained that such collaboration is important with regard to role models for students:

> On a personal perspective, I feel it is, since the children live here in town, we have MACOHA [Malawi Council for the Handicapped] as an institution. There are also ladies who are working though having disabilities. I feel that has been a model to such kind of girl children, saying 'Look at that lady. She is working with MACOHA. She is well paid but she has disabilities. It is through education. Maybe if I do the same, I can also be as good as that one is'. So, on a personal perspective, I think role models have also assisted these learners to excel in their education. (Desk Officer for Primary Education, school B)

Such role models are important sources of orientation for children who are marginalized because they give these students encouragement and future perspectives. While the value of role models was mainly mentioned for girls in the first case study, it was also mentioned as an important strategy for children's intersectional marginalization[16].

While it is important that future perspectives be recognized and noticed by children, formal education has to prove itself useful with regard to the realities of a society. Strategies to ensure this are apparent, especially on the micro level.

5.2.2 Micro Level Findings (School B): The Value of Education Also is Related to Alternatives of Future Perspectives

The challenges referred to by various micro-level stakeholders at school B show similarities with the experiences described by school A stakeholders on the meso level. For example, micro-level stakeholders at school B are also aware of the importance of collaborating with the community. Due to effects of traditional cultural values on attitudes toward formal education, these stakeholders referred to the need for more sensitization of the community. However, they also described positive examples of collaboration between families and institutions.

High commitment and involvement of parents was also observed here as well. The parents support the school not only by organizing and providing food, but also

16 Based on the theory of intersectionality of Crenshaw, who conceptualized intersectional discrimination (Crenshaw, 1989).

by organizing financial resources. Parent-Teacher Associations and mother/father groups conduct activities designed to sensitize the community. The group members described special initiatives such as "door-to-door back-to-school campaigns" and other efforts to implement readmission policies. Their sensitization strategies are mainly aimed at increasing acceptance within the community. Acceptance of the value of formal education is strongly related to the dimension of access as parents and guardians play an important role in encouraging students to go to school. Another sensitization strategy described here is the use of role models. Instead of a girls' education, the main focus here is on other groups, such as orphans, children affected by HIV/AIDS, and children with disabilities.

> We try hard to remind them of the advantages of being educated because the advantages are that if a child is educated, he or she becomes self-reliant in future. We advise them not to be lazy. Even if we discover that our neighbour's child is becoming lazy, we encourage her or him because education is vital. We advise them while citing examples, 'You see that boss, for her or him to be a boss it's because of education, so if you want to become a boss or a cabinet minister, nurse, pilot, you must be educated.' There are some boys who like football very much, so we tell them, 'For that [name of former Malawi National Football Coach] to be there, it is because he got educated. You too should be educated, football later.' That is what we tell them, because education is very important. (School Management Committee, school B)

On the other hand, such perspectives mediated by role models have to prove themselves with regard to reality. Hence, the Vocational Training Centre established at this urban school can be seen as being an additional important strategy to create and enhance future perspectives for children.

School B stakeholders all referred to great progress at their school. They emphasized that educational access for most disadvantaged children has increased in the recent past, while other schools still refuse children with disabilities. They showed that not only people in the community, but also the professionals at the school have to be sensitized. Traditional orientations, including attitudes towards special needs education, shape the professionals ideas as well.

Main Results in a Nutshell

The reflections of micro-level stakeholders at school B revealed similar issues and aspects. Furthermore, these stakeholders hinted that the value of formal education has to prove itself in relation to the reality within their local communities and society as a whole. As has been pointed out earlier, inclusive education to some extent competes with the role of schools within a society. Presumably, this competing relationship here cannot be resolved, but has to be negotiated constantly. Students' individual needs, goals and potentials have to be considered in the process. However, the diversity of students should be respected. Hence, providing

alternative future perspectives to meet these challenges is vital. Such alternative future perspectives not only provide serious opportunities to meet the realities of society, but are also necessary to meet individual needs, goals and potentials.

6 Comparison

Similar aspects reflect the complex relationship between special education and inclusive education at both schools. In both cases, stakeholders across levels revealed conflicting narrow and broader concepts of inclusive education with regard to various groups that are focused on as well as strategies of implementing inclusive education. While some stakeholders refer to children with disabilities and place emphasis on a medical deficit approach, others view inclusive education as including all children. Moreover, the focus on certain groups is influenced by other aspects and differs according to the perceptions of participants at the meso and micro levels. The stakeholders' areas of responsibility clearly shaped their view on certain groups. At the micro level, especially teachers referred to a complex reality in the classroom and at the school. Accordingly, their focus was broader in some sense. However, participants on the meso and micro levels showed similarities concerning perceived challenges facing different groups of children.

With regard to implementation strategies, educational access seemed to be the main focus, but references to the dimensions of acceptance and participation were also made. As we will explain in later chapters, we regard both dimensions, acceptance and participation, as closely related to educational quality (see chapters 4 and 5). Thus, the references made by stakeholders to both dimensions show that they not only envision inclusive education as meaning 'including' all children in the system or in regular classes, but also as achieving a high quality of education for all children. A stakeholder's description of school B can be read as an indication of differential emphases or stages of development towards inclusive education. Educational access, in this sense, is a first important step, while acceptance and participation have to be achieved when children are already in school. Differences between the cases regarding the progress and quality of the implementation process were clearly identified. However, caution is advised as our findings also reveal that a lack of acceptance and participation within the classroom can lead to a higher risk of students dropping out of school. Moreover, as we will discuss in later chapters, a linear perspective that emphasizes those different dimensions of inclusion as consecutive developmental stages must be questioned (see chapters 4 and 5).

Challenges mentioned are aggravated by the lack of an accepted overall concept of inclusive education or concrete goals and responsibilities in the implementation

of inclusive education. The stakeholders at the meso level referred to several issues in this respect. Stakeholders from school A elaborated the complex relationship between the existing needs, lack of resources and additional donors. One negative consequence is that the needs of some students are addressed, while those of other students are not. One stakeholder referred to the need for strategies of assessing the existing needs carefully in order to address such barriers to inclusive education adequately. Thus, these stakeholders refer to challenges associated with the lack of implementation strategies. Meso-level stakeholders from case study school B showed innovative strategies of their own and referred to positive governmental strategies. For example, the District Education Office developed implementation strategies built on professional knowledge as well as collaboration with various partners.

Stakeholders at the micro level show high ideals and high commitment to inclusive education. However, according to all stakeholders, there are overwhelming challenges and a lack of resources in several areas. Additionally, situations in practice also seem to differ in some respects between the two schools. Stakeholders from school B seem to receive much more support from the meso level concerning continuous professional development. Due to continuous professional development activities, teachers at school B seem to be better prepared in terms of teaching methods and didactic strategies. However, teachers at school A also show high awareness of individual situations and challenges facing students. They also invest extra time to support them. Furthermore, despite continuous professional development activities, regular classroom teachers at school B expressed a lack of self-efficacy, high insecurity and a need for further professional development. Teachers in both schools mentioned the aspects of acceptance and participation in the classroom. However, because those at school B receive support from the meso level, their strategies seem to be more elaborated in this respect.

Finally, all stakeholders referred to traditional orientations as a challenge with regard to formal education. Traditional orientations manifest themselves in traditional initiation ceremonies in school A in particular and in conceptions of childhood in general. Furthermore, formal education is gaining importance but must compete with alternative cultural and traditional orientations and with realistic future perspectives for children. Finally, families in both case study areas are equally challenged by global economic inequalities. Accordingly, stakeholders from both schools referred to the importance of having role models to encourage students and give them orientation. However, these goals have to be realistic with regard to realities of the surrounding society. In this regard, stakeholders at schools B showed examples of creating alternative future perspectives for students. Such opportunities must be treated with caution, however. The perspectives, interests and personal goals of the students have to be considered to really offer them an alternative instead of limiting their potential.

7 Conclusions

As the previous chapter has highlighted, inclusive education is on the agenda of macro-level school stakeholders in Malawi, but realizing the goal of inclusive education is quite a challenging and complex enterprise. Accordingly, there are several challenges to overcome. The global goal of achieving high-quality education for all children, including those who are disadvantaged in any regard, is challenged by global inequalities and concrete barriers to implementation. Moreover, our findings have shown that concrete goals, responsibilities and strategies for implementation are lacking, and their absence poses major barriers to implementation. However, our findings also indicate that despite these challenges, innovative local efforts to implement inclusive education are already being made in many local communities.

Free access to education has yet to become an unquestioned reality for all children in Malawi. Our analysis shows that children's access to education still varies according to the characteristics of a school's students and region. In this respect, we found that traditional orientations play an important role in all local communities, but impact differently on the realities in schools across Malawi. A similarity reflected in the comments of different stakeholders is that such traditional orientations compete with formal education in several ways. This means that formal education has to prove its value with regard to the realities of children's lives in Malawi. For example, formal education must lead to attractive future socio-economic potentials and realities for children. The heterogeneity of children's needs, wishes and motivations as well as the unfavourable economic situation in the country further underlines the need to have attractive alternatives promoting socio-economic equity for the future. However, such an approach has to be treated with caution because it runs the risk of understanding children's learning processes as individual-centred and of stratifying students according to their learning outcomes. This estimation hints at the importance of the awareness and reflexivity of professionals (see chapter 5).

Global economic inequalities in Malawi strongly impact on the realities at schools and within society in Malawi. However, several innovative efforts and strategies by the stakeholders to compensate for these deficits and challenge economic inequalities could be identified. Our analysis indicated, for instance, the stakeholders' special emphasis on collaborating with local communities, parents and guardians as well as different partners in the district. Additionally, continuous professional development plays an important role in improving education quality. Such innovative approaches and advances reflect the fundamental meaning of enablers at all levels. Almost all stakeholders interviewed revealed high ideals and high commitment to inclusive education. As our results indicate, the commitment manifests differently across the levels. While stakeholders at the meso level take an interme-

diate position, stakeholders at the micro level face complex realities in their classrooms. Accordingly, meso-level stakeholders notice and challenge contradictions and tensions with regard to the visibility or invisibility of certain groups. Stakeholders at the micro level revealed contradictions and tensions regarding their attitude towards and practices of inclusion which, however, strongly indicate progress in the process of realizing inclusive education. This illustrates that Malawi is currently in an 'in-between' state—which is confirmed by stakeholders as well. Innovations like those mentioned above are important because they emerge from local communities and are highly sensitive for locally specific barriers to inclusive education. As such, they can provide adequate approaches to overcoming such barriers. Moreover, we want to emphasize that such locally specific approaches show the way to creating inclusive spaces in 'developing' countries without imposing western notions of inclusion. A more comprehensive understanding of inclusion can be achieved and adaptive strategies and concepts can be developed in this manner. This is in line with the findings of authors such as Mutua and Swadener (2011). As one stakeholder put it, the concept inclusive education in this sense should not be conceived as an inflexible 'mask' to be donned on local communities, but rather as a meaningful orientation which supports processes of critical reflection. According to this conception, the meaning and existence of the present structures of selection, discrimination and exclusion can be questioned and changed as needed in a locally sensitive manner.

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3.1 Developing an Understanding of Inclusive Education in Guatemala

The notion and meaning of inclusive education is an issue open to debate in different countries. The United Nations Educational, Scientific and Cultural Organization (UNESCO) defines inclusive education as "a process to strengthen the capacities of the education system so that it can reach all of the students", adding that an inclusive education system can only be established if "ordinary schools become more inclusive; that is, if they are able to teach all the children in their communities" (Ainscow & Miles, 2009). It further emphasizes that the purpose of inclusive education is to enable a person to efficiently participate in society so that said person can take full advantage of his potential emphasizing that the challenge resides in "how to achieve an equitable, high quality education for all the students" (ibid., pp. 6-8).

Therefore, the *refie* project was designed to advance the understanding of inclusive education in developing countries by addressing the following two research questions: How is the concept of inclusive education constructed from the perspective of stakeholders at different levels (macro, meso, and micro)? Which success factors of and barriers to inclusive educational systems can be identified and used to draw conclusions for future developments of international co-operation?

These research questions were based on two assumptions. First, the concept under study needed to be analysed from a systemic approach, thus the object of analysis was the education system itself. Second, as applied researchers looking for context-related recommendations for action, we decided to apply a qualitative research approach that would enable us to develop proposals for actions relevant to the national context. This is an important consideration given that the evidence on inclusive education has been mainly produced in the developed world (Ainscow, 2004).

The study was carried out in two countries, Guatemala and Malawi. This chapter provides information and research evidence about the former. Guatemala was selected for two reasons. First, the German Cooperation has a long history of supporting education in that country, and has accumulated considerable knowledge about the challenges and opportunities in this field. Second, Guatemala has a population characterized by cultural, linguistic, and ethnic diversity, and these attributes generally intersect with inequities across multiple sectors in developed

and developing countries. Therefore, the unique context of Guatemala offers distinctive opportunities to gain insights about the educational needs of people living in a highly diverse society where poor socio-economic conditions affect most of the population. In addition, Guatemala is a rich context in which to examine the meanings, implementation, and consequences of inclusive education. These aspects have been under examined in the literature on inclusion across the world (Artiles & Dyson, 2005).

The purpose of this chapter is to present various stakeholder perspectives on inclusive education inferred from the research evidence. The *refie* project was aimed at understanding the different views of stakeholders in three dimensions of inclusive education: Access, acceptance, and participation. In this chapter, we begin by outlining the Guatemalan context in socio-demographic and educational profiles. This information is included to provide a frame of reference for interpreting the research results. Next, we describe our research methodology and conclusions, including stakeholder perspectives about inclusive education. The content of this chapter is based on the final national report of the *refie* project (refie, 2015).

The evidence shows that stakeholders conceive education as a powerful tool for personal and collective development in the Guatemalan context. However, it is important to ask different questions in order to obtain new ideas for improving inclusive education. Otherwise, citizens of developing countries will keep their hopes but continue living in inequitable conditions.

1 Guatemala's Socio-Economic and Cultural Contexts

Guatemala is the northernmost country in the Central American isthmus, with a total area of 108,890 km² (index mundi, n.d.). The last population census was carried out by the National Statistics Institute (Instituto Nacional de Estadística [INE]) in 2002. The projected population for 2014 was 15,806,675, of which 51.2 % were women. Moreover, a national survey indicated that 51 % of the population was under 20 years old, and 14.2 % were between 0 and 4 years old (INE, 2015). In 2011, 51.5 % of the population lived in rural areas, and 40 % of the total population identified themselves as indigenous people. Twenty-four languages are spoken in the country: 21 are Mayan languages, and the other three are Garífuna, Xinca, and Spanish. Spanish is the official language of the country (INE, n.d). These statistics reflect the diversity of the Guatemalan population.

The United Nations Children's Emergency Fund (UNICEF, 2015) refers to Guatemala as a post-war country torn by armed conflicts that lasted 36 years (1960-1996). These conflicts erupted over deep inequities in the distribution of assets and capital, in particular land, and the discrimination of indigenous peo-

ples. Peace accords were signed in 1996, marking the end of the armed conflicts. These treaties aimed, among other things, to contribute to the transition towards an equitable society offering better opportunities for achieving sustainable development. As part of the efforts resulting from the peace accords, an educational reform was launched in 1997, when the National Board designed the blueprint for the National Education System Reform (NESR). From that time on, the NESR has been the framework for the Guatemalan educational policies implemented over the past 20 years (Comisión Paritaria de la Reforma Educativa [COPARE], 1998).

Two words describe the socioeconomic situation in Guatemala today. One is *diversity,* which is reflected in the diverse cultural, linguistic, and ethnic range of the Guatemalan population. The second is *inequity,* as demonstrated by the Human Development Index (HDI)[1] of the United Nations Development Programme (UNDP), and the Gini coefficient[2]—a commonly used measure of income inequality.

According to the UNDP, Guatemala has an HDI of 0.628 and ranks at position 125 out of 187 countries, which categorizes Guatemala as a country with medium human development and, thus, as a developing country (UNDP, 2014a). However, it is important to remember that there are substantial differences in living conditions, and that various forms of inequities plague regions and citizens across the country (refie, 2015).

In 2011, Guatemala had a Gini coefficient of 0.524, characterizing it as an unequal country (World Bank, 2011). Economic inequality affects not only the living conditions of individuals, but also their access to opportunities. In addition, more than 800,000 youth between 13 to 18 years of age are excluded from the national education system (Ministerio de Educación [MINEDUC] & UNESCO, 2014). Also, it is estimated that between 1 and 1.5 million Guatemalans live in the USA, where approximately 60 % are illegal aliens (International Organization for Migration [IOM], 2013).

Poverty is a common denominator in the lives of Guatemalan citizens. Over half of the population lives in poverty. According to the National Survey of Living

1 The HDI is a summary measure of average achievement in three key dimensions of human development a long and healthy life, education, and a decent standard of living. The health dimension is measured by life expectancy at birth; the education dimension is measured based on the mean of years of schooling for adults aged 25 years and older, and the expected years of schooling for children of school entry age; and the standard of living dimension is measured as gross national income per capita (UNDP, n.d.).

The respective cutoff points for the country groupings are < 0.550 for low human development, 0.550–0.699 for medium human development, 0.700–0.799 for high human development, and ≥ 0.800 for very high human development (UNDP, 2014b).

2 The Gini coefficient is a measure of income inequality in which 0 corresponds to perfect equality and 1 corresponds to perfect inequality.

Conditions (INE, 2011), the total poverty rate is 53.71 % of which 13.33 % live in extreme poverty. The national survey showed that total poverty is 34.97 % in urban areas and over twice as high in rural areas (71.35 %). Malnutrition is a vulnerability factor linked to poverty. According to the National Survey of Mother and Child Health (Ministerio de Salud Pública y Asistencia Social, 2011), the total proportion of 3 to 59-month-old children suffering from stunted growth is 49.8 %, of which 21.2 % show signs of acute malnutrition. Guatemala's indigenous peoples are the most severely affected given that 65.9 % are stunted and 31.3 % suffer from acute malnutrition. As reported by the World Bank (2009), poorer homes are also more vulnerable to reductions in household income through remittances, food price variations, crime, violence, climate phenomena, and other events that pose a constant threat to their wellbeing.

Concerning the economic activity of the population, the National Survey of Employment and Income (INE, 2015) reported that approximately 10.5 million Guatemalans are aged 15 years or older and thus make up the working age population (WAP), 60 % of which comprises the economically active population (EAP). The 2015 EAP rates were higher for men (82.9 %) than women (40.6 %). The most significant gender differences are found in rural areas, where the WAP for women is less than half than the one for men (33.4 % vs. 86.4 %, respectively). At the national level, 65.8 % of the employed population works in the informal sector, particularly in rural areas; 8 out of 10 workers are employed in this sector. The majority of indigenous peoples (80.3 %) are employed in the informal sector. Child labour, a persistent issue in the country, is defined as "any economic activity carried out by children" (ibid., p. 55), where children are defined as persons under 15 years of age. At the national level, 10.7 % of children aged 7 to 14 years are involved in some kind of economic activity; the highest child labour rates are found in rural regions (15.3 %), and the lowest in metropolitan areas (4.4 %). More boys (71 %) than girls (29 %) are working. Furthermore, 57.9 % of working children are indigenous, and 46.5 % of children work in agriculture (ibid.). Prado (2015) conducted a child labour analysis (age range = 7 to 17 years), which showed that 35 % of working children in Guatemala work for third parties, and 95.8 % do not have an employment contract. Moreover, 69.6 % and 46.2 % of indigenous and non-indigenous children, respectively, are not remunerated for their labour. An interesting fact is that 93.1 % of working children reportedly know how to read, working children have an average of 4.67 years of schooling. Furthermore, it was reported that indigenous girls living in rural areas had the least years of schooling (Prado, 2015, p. 29), and urban non-indigenous children had the most years of schooling. The statistics indicated that 53 % of working children do not study, where 40.6 % are from the rural area.

Motherhood is a factor that increases the probability of exclusion and vulnerability for adolescent girls, defined in Guatemala as females between the ages of

10 and 19 years (INE, 2013). In 2011, 21 % (78,016) of a total of 373,692 live births were recorded in adolescent girls, 3.6 % of whom were between 10 to 14 years old (ibid.).

These statistics paint a compelling picture of the challenges Guatemalans face, particularly indigenous peoples, girls, women, and children. As stated earlier, inequity is ubiquitous in this nation.

2 The Guatemalan Education System

It is important to study educational systems because, as the Organization for Economic Co-operation and Development (OECD) pointed out, they are usually at the centre of policy debates (OECD, 2010). Generally, the system is studied from a holistic approach intended to help understand how it works and how innovations could be made. Another relevant reason for such research is that inclusion is considered a major challenge to be achieved by educational systems around the world (Ainscow, 2004; Ainscow, 2012).

In the following sections, we will describe two main areas of the Guatemalan education system. The first is the legal framework and the second is the organizational structure. We will then examine some educational indicators to illustrate how the system works.

2.1 Structure and Legal Framework

The responsibility of the State to provide education is fulfilled by Guatemala's national education system, which is divided in two sub-systems. The first *(*escolar; scholarized*)* is the sub-system responsible for providing education from pre-school to the end of high school. The second sub-system (extra-escolar; non-scholarized) is an alternative path that offers different types of education and training programmes for adults, youth, and other groups of students unable to attend regular school. The educational programmes have a strong community approach, and some have local government involvement. The national education system is managed by the Guatemalan Ministry of Education.

The education system works to attain its goals pursuant to the legal and policy frameworks that regulate its functioning. According to MINEDUC and UNESCO (2014), this frame is also based on international laws, accords, conventions, and other signed agreements, such as the Universal Declaration of Human Rights, the Declaration of the Rights of the Child, the World Declaration on Education for All, and the UN Millennium Declaration.

The Constitution of the Republic and the National Law of Education (Decreto Legislativo 12-91) recognize the responsibility of the State to provide nine years

of free and mandatory education to all Guatemalans. Other national laws regulate education as part of other obligations of the State, such as the Law of Social Development (Decreto 42-2001) and the Law for the Dignification and Integral Promotion of Women (Decreto Legislativo 7-99).

In 2010, the National Board of Education created eight general policies to increase the coverage, quality, and equity of educational services. The policies address 1) the allocation of more resources in education, 2) the coverage and quality of bilingual education, and 3) the decentralization of services (Consejo Nacional de Educación, 2010).

According to MINEDUC and UNESCO (2014), public policies for vulnerable groups also exist that cut across the domains of activity of the Ministry of Education; these include the National Policy for the Promotion and Integral Development of Women 2001-2023, the Policy on Coexistence and Elimination of Racism and Discrimination 2006, the National Youth Policy 2012-2020, and the Inclusive Education Policy for the Population with Special Educational Needs with and without Disabilities (MINEDUC, 2008). In this chapter, we will elaborate on the policies for inclusive education.

2.2 Formal Educational Services and Their Main Results

A survey of educational services (Dirección de Planificación Educativa [DIPLAN], 2014) showed that Guatemala had a total of 15,835 preschools and 19,414 primary schools in 2014; it estimated that 82.62 % of preschools and 84.55 % primary schools were public. (Please note that Guatemalan preschools are regularly located in primary school buildings, but have their own administrative and teaching staff.) In 2014, the majority of preschools (77.82 %) were monolingual (Spanish) and rural (76.19 %), as were most primary schools, which were 80.85 % rural and 59.48 % monolingual (DIPLAN, 2014). There are three types of primary schools in Guatemala: 1) graded (44.32 %), 2) multi-graded (42.16 %), and 3) one-teacher (13.52 %). Graded schools have one teacher or more per grade, multi-graded schools have teachers looking after several grades each, and one-teacher schools, as implied by the name, have one teacher in charge of all grades. In 2014, 55.68 % of primary schools were multi-grade and one-teacher schools DIPLAN (2014). Moreover, in 2013, 7,561 lower and 3,897 upper secondary schools served this population. The majority of lower secondary schools were urban (83.96 %) and private (80.8 %). Upper secondary schools showed the same tendency: 51.06 % were urban and 45.6 % were private (MINEDUC, 2014).

In 2015, *refie* investigators analysed several educational indicators to determine how Guatemala's national education system was fulfilling its goals of providing educational access and retention in the school system and to provide information on outcomes at different levels of the system. Two key indicators will be highlighted here. The first is school enrollment, a dimension of educational access, and the

second is the completion rate, a measure of school acceptance and participation. Regarding the former, both the gross[3] and the net enrollment rates[4] provide information about the percentage of the population served by the public schools. For example, a 2014 survey at the primary education level showed that 82 % of 7 to 12 year-old children were served by public schools, compared to only 23.8 % of the 16 to 18-year-olds, reflecting an age gap in access for youth in this age cohort. In addition, it is important to know how many students enrolled in a given grade of school were promoted to the next grade. The following table shows the 2014 enrollment and promotion rates by gender and education level.

Tab.1: Enrollment and promotion rates by gender and educational level

Level	Gender	Gross enrollment rate	Net enrollment rate	Promotion rate
Preschool	M	61.9 %	46.2 %	Promotion is automatic
	F	62.9 %	46.4 %	
	T	62.4 %	46.3 %	
Primary (grades 1-6)	M	100.5 %	82.6 %	86.3 %
	F	96.1 %	81.4 %	88.8 %
	T	98.4 %	82 %	87.5 %
Lower secondary (grades 7-9)	M	72.3 %	46.1 %	67.8 %
	F	64.1 %	43.6 %	75.7 %
	T	68.2 %	44.9 %	71.6 %
Upper secondary (grades 10-12)	M	36.9 %	23.3 %	80.3 %
	F	37.4 %	24.3 %	85.8 %
	T	37.1 %	23.8 %	83.1 %

Source: MINEDUC, 2014

Moreover, it is crucial to know the percentage of completers (students who complete the school year), repeaters, and over-aged students. The Guatemalan Ministry of Education defines over-aged students as those who are two or more years older than the age regarded as the ideal for the grade (MINEDUC, 2013). Table 2

3 The gross enrollment rate refers to the number of children enrolled in a given level (primary or secondary), regardless of age, divided by the total population of the age group that officially belongs to this level (UNICEF, n.d.).

4 The net enrollment rate refers to the number of children enrolled in a given level (primary or secondary) who belong to the age group that officially belongs to that level, divided by the total population of the same age group.

shows the completion, repetition, and over-age rates for the year of 2013 by gender and total rate. Data on pre-primary completion and over-age rates were not available. Furthermore, there are no repeaters at this grade level since all students are automatically promoted.

Tab. 2: Completion, repetition and over-age rates by gender and educational level, 2013

Level	Gender	Completion rate	Repetition rate	Over-age rate
Primary	M	96.19 %	11.16 %	22.74 %
	F	96.90 %	9.15 %	18.65 %
	T	96.55 %	10.16 %	20.77 %
Lower Secondary	M	92.86 %	5.46 %	31.44 %
	F	95.55 %	3.48 %	24.37 %
	T	94.21 %	4.47 %	28.16 %
Upper Secondary	M	97.19 %	1.06 %	30.64 %
	F	98.99 %	0.82 %	26.20 %
	T	98.1 %	0.94 %	28.42 %

Source: MINEDUC, 2013

In conclusion, the Guatemalan education system must overcome many challenges to enhance access to early childhood and preschool education and to ensure the successful transition from primary to secondary education. These challenges may be related to the high educational exclusion rate, as reflected in the repetition and over-age rates at the primary education level.

The above statistics show that, although the legal framework and two sub-systems organizational structure of the education system are intended to promote inclusion, significant factors associated with educational exclusion exist that exacerbate the vulnerability of certain groups in the country's population.

3 Methodology of the Study

The methods used in this study were similar to the approach used by Kalyanpur (2011) in other developing countries. Through document review, interviews, focus groups, and classroom observations, we collected information from stakeholders at three levels of the education system: Macro (education policy), meso (intermediary), and micro (school). Six representative schools were selected

to illustrate the challenges of delivering inclusive educational services in Guatemala. It is important to note that we focused only on the formal sub-systems in order to make comparisons between the two countries studied in the *refie* project. The various factors considered in the selection of the case study schools included:

- Location (rural vs. urban),
- Ethnicity and language of student population (indigenous-bilingual vs. Ladino-monolingual),
- Size (large vs. small) and
- Majority/minority representation (Ladino students in Mayan communities/Ladino learners in Ladino areas).

In addition, an inclusive school and a multi-grade school were included in the study. Ministry of Education officers identified the former as inclusive based on the fact that it provides access to children with special educational needs. The multi-grade school was chosen because it represents the typical public school in rural areas of Guatemala. We assume that these characteristics accurately reflect the complex demographics and diversity of the population across the different regions of the country.

Tab. 3: Characteristics of the selected primary schools

Description	Size	Area	Ethnicity	Language	Classification of the school
1) Urban school in an economically deprived community	Large	Urban	Ladino	Spanish	Monolingual
2) Inclusive school	Large	Urban	Ladino	Spanish	Monolingual/ Inclusive
3) Ladino school in a Mayan region	Large	Urban	Ladino	Spanish	Monolingual
4) Multi-grade school	Small	Rural	Indigenous	K'iche'	Bilingual
5) Monolingual school in a bilingual context	Large	Urban	Indigenous	Mam	Monolingual
6) Ladino school in a Ladino region	Large	Rural	Ladino	Spanish	Monolingual

Definitions: Small school: < 100 students and 2-3 teachers. Large school: >900 students and > 3 teachers. Indigenous: Member of a Mayan group speaking one of the Mayan, Garifuna or Xinca languages. Ladino: Person of mixed ethnic ancestry (indigenous and Spanish) not belonging to Mayan group. Monolingual school: Utilises Spanish as the only language of instruction. Bilingual school: Teaching based on the official bilingual education guidelines. Inclusive School: Includes students with special educational needs in regular classrooms.

The research team visited each case study school twice. On the first visit, which lasted two days, we introduced the research team, explained the purpose of the study, and requested permission from the local authorities to carry out the study. During the second visit, which lasted six days, we collected data and information through interviews, focus groups, classroom observations, and school observations. We held a total of 169 consultations, consisting of individual interviews (average of 1 hour each), focus group discussions (1.5 hours each), and classroom observations (2 hours each). A native of each region was included in the research team during the fieldwork. All audio recordings were transcribed.

The data were analysed using MAXQDA® software. The research team designed and used a code system to encode all transcripts of the collected data. Virtual or physical meetings between the national team and the international advisor were held periodically to discuss the coding processes and to assess the inter-coder reliability. For validation of the preliminary data, we conducted a workshop with stakeholders from all three levels of the education system. The preliminary results were then presented to the international team and Advisory Board. The results of the study were published in a national report and in six case study reports from each school. In addition, a video was produced as a resource for presenting the main study findings to the wide and heterogeneous group of persons who participated in the study; the participants were then invited to discuss the findings and their implications. The video was produced in Spanish and translated into four Mayan languages.

Although the generalizability of the study results is limited, we believe their scope is significant enough to guide future discussions and to design interventions aimed at advancing the inclusive education agenda. In the next section, we will discuss inclusive education from the perspective of stakeholders at three levels: Micro (e.g., students, parents, teachers, headmasters, and community leaders and authorities), meso (district leaders and district or regional authorities), and macro (officials from the General Directorates of the Ministry of Education, researchers, university teachers, members of the international community, union leaders, and members of non-governmental organizations [NGOs] working in education).

4 Inclusive Education from the Stakeholder Perspective

Our research was based on the assumption that inclusive education could succeed if there was:

- A common view about inclusive education among stakeholders in the system,
- A harmonized model for the implementation of inclusion within the education system and
- Support from other government and non-government organizations working to promote education.

This was the main reason for our interest in approaching stakeholders from and associated with the educational system.

Inclusive education has been described as a team task for the whole education system. Echeita and Ainscow (2010) pointed out that inclusive education will not advance as expected if urgent systemic reforms and changes are not implemented. Obviously, changes and reforms in different countries vary according to their particular conditions and needs, but Echeita and Ainscow (2010) reminded us to consider two important questions:

- What needs to be done?
- How will improvements in the education system be perceived?

Echeita and Ainscow (2010) described the notion of perspective as a construct that helps to explain a fact in terms of what we see and how we interpret it, adding that perspectives relate to beliefs and implicit theories about specific facts or social processes. In our research, we defined stakeholder perspectives as the points of view about inclusive education expressed by participants in response to the said research question. The different perspectives gathered by this approach are presented in the following pages. Each perspective is described separately. Finally, we discuss what we have learned about inclusive education in a developing country.

4.1 A Paradigm in Transition

> "The concept of inclusive education has shades ... When introducing, for example, the topic of indigenous peoples, there are deterrents" (International Cooperation Agency representative in a focus group).

One stakeholder perspective documented in this study indicated that the perception of inclusive education is changing, but contradictions are arising in the process of structuring a new paradigm. This is explained in the following paragraphs. Among the participants at the three levels of the education system, the macro-level stakeholders were those who explicitly pointed out that inclusive education is a paradigm in transition in the Guatemalan context. This group consisted of

academics, teacher's union leaders, members of international cooperation organizations, NGO workers, government officials, Ministry of Education officers, and experts in inclusive education. The prevailing idea was that people are starting to see inclusive education from a broader perspective because previous understandings of inclusion were mainly related to educational services for people with special educational needs with or without disabilities.

This group of stakeholders also said that the concept of inclusive education should be considered as framed within the historical and social context of inequality of a nation with a history of colonization, structural inequities, racism, and discrimination. One example cited was that Guatemalan indigenous people (about half of the total population) have been excluded and neglected in many ways by the State. Therefore, when the inclusion of indigenous people into an educational system that has been formerly exclusionary is considered, some citizens and groups might reject the idea because they do not want to become part of a discriminatory system. Thus, stakeholders from the international cooperation sector perceived different shades of inclusion. In other words, inclusion is not a neutral idea equally welcomed by all groups in Guatemalan society because the nation is stratified and has both privileged and disadvantaged groups. Kalyanpur (2011) identified similar processes associated with this kind of paradigm shift in another developing country.

We noticed that the discussion of inclusion by education system stakeholders (including teachers, parents, local leaders, headmasters, and local and regional government officials) and among stakeholders from different non-governmental organizations that support education was rooted in the values and attitudes prevalent in this discriminatory society, which differentiates people based on their cultural, ethnic and linguistic backgrounds, living conditions or particular educational needs. Thus, we observed that some stakeholders were unwilling to accept certain groups at regular schools. Personal attributes such as behavioural problems, older than the average age, or membership in certain groups such as gangs were the stated reasons for rejection. On the other hand, some educational authorities, teachers, and headmasters considered inclusion a natural practice in Guatemalan schools because, given the diversity of the student population, all students were accepted without discrimination. That is, the concepts of diversity and inclusion—its attendant educational practice—were normalized in these participants' views (Davis, 2014). Previous research in Cambodia by Kalyanpur (2014) observed similar willingness to accept students with disabilities at regular public schools and named it "natural inclusion" (p. 90). Therefore, inclusive education is a *de facto* practice in Guatemala and perhaps other developing countries since students attend the regular educational system. From this perspective, educational opportunities are available for any students, albeit without specialized services for

vulnerable groups. Regular schools accept and educate children using an undifferentiated approach.

Nonetheless, inclusive education is not just a matter of school accessibility: a good education system must be capable of providing quality educational services. The implementation of an inclusive education system requires that schools avoid practices resulting in categorization and potential exclusion. As one stakeholder from a Guatemalan university said:

> A so-called universal school relates to organizing boys and girls by age, in grouping them by age and according to their economic condition. Because there is a school for poor people, one for middle class people, and a different one for rich people, it divides and tries to standardize; that is, the school itself is an institution that is not prepared to accept differences and work with these differences. (Academic focus group)

> We are making a proposal for a 20-year national development plan. One of the priorities of this plan is a bet on education. (Public Official in an interview)

Education was also seen as a mechanism that had the potential to reverse negative conditions currently prevailing in the country. It was also recognized that education demanded the concerted efforts of society because it is an issue of national interest.

> Well, for me … in twenty years, hopefully my son will be a lawyer or a doctor or a mechanic. It would be a privilege for me if that were the case, that's all. (Father in a focus group)

Finally, stakeholders emphasized that the highest expectation of education is that it should offer self-fulfilment. Lack of education means a lack of freedom, dependency on others, experiencing 'shame' for not understanding the world around them, or 'sadness' for not being able to communicate in another language. In contrast, access to education gives people the opportunity to 'awaken' or to change their living conditions. Such expectations for the role and impact of education were expressed by a public education officer in the following words:

> Of course it is necessary to study to get a good job … and that shouldn't be the case. … It is [also] necessary to study to improve yourself, to get to be someone, to integrate into society—not a consumption society but a society of knowledge. It is necessary to study (only) to get a good job, so education is seen as something commercial. (Director, Departmental Directorate of Education in an interview)

Evidence obtained at the three levels of the system confirmed that the stakeholders recognized that education has an impact on the development of the person, the community, and the nation as a whole. According to some stakeholders (e.g., supervisors, teachers and parents) at the meso and micro levels, education should

not be understood exclusively as the route to earning more money on the job, but also as the door to personal freedom and self-fulfilment.

4.2 Education is the Main Route to Development

> "I would think without a doubt that education is basic—it is the key to development, to the advancement of a community" (Director, Departmental Directorate of Education in an interview).

The relationship between education and development, as proposed by the stakeholder quoted above, was a common view expressed by study participants at different levels of the education system. They considered education to be an engine for development and a mean to end poverty and inequality. One participant explained:

> We are making a proposal for a 20-year national development plan. One of the priorities of this plan is a bet on education. (Public Official in an interview)

Education was also seen as a mechanism that had the potential to reverse negative conditions currently prevailing in the country. It was also recognized that education demanded the concerted efforts of society because it is an issue of national interest.

> Well, for me … in twenty years, hopefully my son will be a lawyer or a doctor or a mechanic. It would be a privilege for me if that were the case, that's all. (Father in a focus group)

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4.3 Inclusive Education: A Concerted Effort Across Sectors of Society

> "Inclusive education is one that guarantees and takes every measure to ensure that all children have the same opportunities, even though the starting point of each child is very different" (Public Education Officer in an interview).

The stakeholder perspectives summarized in this report place the discussion of inclusion in the contexts where it is expected to be implemented and it highlights that inclusion requires the concerted effort and commitment of all stakeholders to embark on an inter-sectorial mission. Stakeholder perspectives varied according to their level of interaction in the education system, but the common view was that, ultimately, the implementation of inclusive education requires the coordinated effort of society. This is explained in more detail in the following paragraphs.

We already stated that deep inequalities characterize Guatemala. Education is not exempt from this reality, but it is expected to reverse the problem. The education one receives is not the same in an urban versus rural school, or in a graded versus multi-graded school. A student growing up in poverty has to overcome many challenges (e.g., malnourishment) in order to succeed in school. Teacher in schools located in poor communities face challenges that go beyond teaching skills (e.g., some are required to walk for many hours every day to get to school). To be a headmaster of a school in a developing country, one must be able to manage tasks that headmasters in other countries probably never have to take care of (e.g., teaching three grades and managing a rural school for the same salary). Mother and fathers living in poverty perceive education as a promise and aspiration, but it cannot always be taken for granted for all one's children will receive an education (for example, if it is necessary to move to another city so that a child with special educational needs can attend an inclusive school). This is illustrated in the following quotes:

> But the starting point of each child is very different … Some are at a starting point that allows them to take advantage of all the conditions provided by the System, but other children are far from it, and although the System provides them with the same opportunities, there is a gap that nobody is covering. (Public Education Officer in an interview)

> And if they finish their primary school, what do they do next? They stay at home or go to work in a tortilla shop or a convenience store in Guatemala [City], Escuintla or other departments. (Focus Group Member, Education Council of Parents at the multi-grade school)

Therefore, it is important to keep in mind that there is a strong field of tension between two different realities in Guatemala: Inequality brought about by poverty and reflected in poor living conditions, and diversity, which is a human trait. Inclusion aims to eliminate inequality and to respect and welcome diversity. Inclusive education needs to deal with both of these realities.

Considering the aforementioned factors, it seems that it would be a difficult task to implement inclusive education exclusively at the school level, whether by efforts of the school community or by the education system on its own. Our research evidence indicates that, in order to achieve inclusive education in Guatemala, efforts made by other State entities across sectors as well as by non-governmental institutions are crucial. According to Kalyanpur (2011), poverty is the underlying cause of disability produced by preventable factors such as malnutrition, lack of immunization, or lack of access to public health services. Exclusion related to poverty generates insurmountable gaps in access to the education system. Therefore, measures for the integral protection of children should be implemented during the first years of life, before entry to school. Such approaches go beyond the competencies and resources of the education system since interventions for these age groups require the multi-sectoral involvement and coordination of the health, labour, social welfare, and other sectors.

Stakeholders from all three levels of the education system who participated in the research demanded an emic understanding of the dimensions of inclusive education (access, acceptance, participation, and academic performance). They explained these dimensions as follows:

1. Access referred to learning conditions in school (e.g., school infrastructure).
2. Acceptance had axiological implications (e.g., respect, tolerance). This dimension was mainly mentioned micro-level stakeholders.
3. Participation was related to how the process of learning was being implemented (e.g., bilingual education), which also depends on accessibility and acceptance.
4. Successful academic performance means that the aforementioned dimensions should be measured in the education system as well as in the student. Although we did not study this dimension, macro-level stakeholders (Directors of the MINEDUC General Directorates) mentioned and defined it as described previously.

In summary, to build an inclusive educational system in developing countries, one must conceptualize it as an undertaking that requires the concerted effort of society. The expected goals of inclusive education can be achieved if efforts are guided by educational and social policies under the responsibility of the State and with the aid of the civil society. Inclusion will be achieved if the education system

builds bridges to accomplish social inclusion. If not, the promise of equal opportunity to education for all could become a broken promise.

4.4 Is Education a Human Right for All? The Protean Nature of Rights

> "There are children who migrate … and you ask them, what are you doing? I am here, trying to earn a living. So, are you studying? No, they say, because I don't have time, because I am working" (Municipal Government Official in an interview).

Education was recognized as a human right in Guatemala. However, because fulfilling this right was restricted or limited by particular identity markers, there were different interpretations about who enjoyed the right and how it had to be realized. According to actors at the micro level—i.e., parents, students, teachers, headmasters, and members of the community—the following types of individuals had a limited right to an education: Girls who are mothers, persons with special educational needs with or without disabilities, over-aged students, migrant students, and students associated with criminal groups (gangs).

The arguments on how to uphold the right to an education differed depending on the appraisal of each case. These appraisals were made, for example, by teachers who decided that they did not want to have certain students in their classrooms. Sometimes the decisions came from the headmasters not to admit certain students when parents came to enrol the children. Thus, not everyone achieved inclusion in a regular classroom. This practice was problematic given that decisions were made arbitrarily, despite the fact that there is a legal framework regulating education. It seems that policy implementation and practices depend more on the will of local decision-makers than on what is prescribed in the legal framework.

A conflict of interest was observed in relation to the recognition of the right to education from the perspectives of students and their parents. Parents or adults who have lived in poverty and/or had limited access to school tend to have low expectations about what school can offer their children and often fail to claim their children's right to education. Their financial circumstances may force them to choose between having their child earn a living or go to school.

> Sometimes parents don't want their children to study because of the work situation, because there isn't much work—they finish their studies and there is no work; they graduate and there is no work; some are even professionals and there is no work. Only a few are working and the majority just stays at home. This is why they decide to leave for other places. (Local leader in a school community in an interview)

In summary, the notion of education as a human right changes across contexts, situations, and actors. In some instances, the right to an inclusive education is restricted or limited by arbitrary measures and actions carried out by stakeholders.

Frequently, the rights bestowed by the state to citizens are denied by local actors in positions of authority; rights morph from political entitlements to gratuities allowed by local government agents. Consequently, rights are sometimes erased in institutional moments in which state employees act as the gatekeepers of children's rights. In other instances, parents sceptical about education's promise of social mobility may fail to claim their children's right to an education, particularly when living under adverse socioeconomic circumstances. Their decision is grounded in a compelling logic: In a country in which the social capital of a small group of citizens rules the economic opportunities of the majority, it generally will not make a difference if one has an education degree or not. In the emerging democracy of Guatemala, rights are victories of political recognition with weak material impacts. Education may be a right, but it does not afford the same benefits to everyone.

4.5 The View from Above and Below: Challenges and Opportunities When Forging an Inclusive Education System

> "We need to find a solution for this sadness we have because the majority … in the first place don't speak Spanish, and we can't progress that way" (Rural Fathers Focus Group member).

The official statistics suggest that the Guatemalan education system has made several advances, such as increasing education coverage at the primary education level, improving the access and retention of girls in school (mainly in urban areas), reducing illiteracy, creating a national curriculum, and devising inclusion policies for students with special educational needs with or without disabilities, to name a few examples. Nevertheless, in the case of many boys, girls, youth, and adults, the right to an education is not being met and, as our findings suggest, many barriers and challenges must be overcome before inclusive education for all children can be realized in Guatemala. To conclude the discussion of our research findings, we adopt a broader systemic perspective to outline key challenges related to the consolidation of inclusion in the Guatemalan education system. We also describe opportunities documented at the ground level that can counter the macro challenges in the educational system.

Mariga, McConkey, and Myezwa (2014, pp. 16-17) identified nine characteristics that contribute to making inclusive education systems successful:

1. Having leaders at the different levels of the educational system with commitment and knowledge about inclusive education;
2. Having clarity of the purpose and being able to defend the values, rationale and practices of inclusive education;

3. Setting realistic goals and maintaining enough motivation among all the stakeholders in order to achieve results and visible progress;
4. Developing clear and manageable systems such as inclusive education plans, curriculum, guidelines, and training strategies;
5. Building trust with parents and gaining their active participation through good and regular communication;
6. Having a support network of interested and committed persons, including teachers, students, and community members ('Inclusive Education Committees');
7. Have a guiding group at the Ministry of Education ('Inclusive Education Unit') responsible for promoting inclusive education and providing schools with the necessary resources and training;
8. Liaison person 'on the ground' who is visible and available to the community, parents, students, and schools;
9. Monitoring and evaluation of inclusive education initiatives so that successes and deficits can be identified.

These characteristics shed light on several key gaps and needs that must be addressed in Guatemala as government officials, professionals, parents, and other community stakeholders strive to build an inclusive education system. We grounded the discussion of our findings on inclusive education in Guatemala in the list of successful traits proposed by Mariga and colleagues. Based on the evidence from this study, we identified the following issues related to the lack of a clear and shared view of inclusive education, barriers to accessing education, the limited relevance of education for social inclusion, and perceptions about the contributions and impacts of international development projects.

First, the evidence shows that there is no clear and shared idea about what inclusive education should look like in Guatemala. Therefore, stakeholders from the three levels of the education system, including the scholarized and non-scholarized subsystems, do not have a clear concept of the purposes, orientations, and practices of inclusive education. A strong view shared by many leaders and stakeholders in the national education system is that inclusive education is mainly for learners with special educational needs. We found evidence of coordination of the efforts of institutions and local organizations to promote the inclusion and retention of vulnerable students in the school system, some of which (e.g., pregnant girls) are embraced in a broader definition of inclusion. However, the lack of conceptual convergence and clarity creates disruptions in the educational system. We found evidence that the education system has difficulties in internal coordination as well as in communication with external organizations promoting education at any of the three levels. For instance, many actions of the educational system (e.g., the allocation of resources or the delivery of services) are implemented according to

a fragmented vision of individuals, resulting in the creation of bureaucratic silos or boxes. The system's actions are guided by prioritizing group needs defined by specific identity markers, such as bilingual education and special education. As one macro-level stakeholder explained, this work is being done according to a Noah's Ark principle, in which each compartment of the system advocates for its own group. A consequence of this state of affairs is that different entities from the Ministry of Education work with a lack of coordination, scarce resources, fragmented views of individuals, and no linkage with other relevant social policies. Second, due to the fragility of the idea of rights and their mutable properties, the K-12 educational system continued to exclude learners contingent upon the ad hoc gate-keeping decisions of local actors. Thus, access to education was restricted for certain vulnerable groups. In addition, the educational system lacked explicit linkages with tertiary education and the workforce. As we explained in a previous section, this raised questions in the minds of parents and community members about the contributions of inclusive education to *social* inclusion. The differential access to education and its lack of articulation with socioeconomic opportunities fostered and reproduced inequality. As a result, parents, students, and teachers thought that school was unreachable and to some extent irrelevant for poor families, resulting in declining motivation and aspirations. These constraints made the existence of practices that prevented educational access and of an educational system that lacked relevance for the socioeconomic futures of the population painfully visible.

Notwithstanding the challenges discussed thus far and in some cases the arbitrary measures and actions carried out by stakeholders, the study also found critical opportunities in the system, specifically those referring to 'institutional agents', particularly at the micro level. We found that 'institutional agents' make substantial contributions to inclusive education efforts in Guatemala (Stanton-Salazar, 2010, as cited in Dowd, Pak, & Bensimon, 2013). These agents are individuals who had a formal role in relevant institutions and therefore have the knowledge of procedures, rules, and the cultural capital needed to ensure that students have the opportunity to access resources, critical information, support, and learning opportunities. Institutional agents playing the roles of protectors and supporters enable students, in particular those in need of differentiated attention, to be successful in the school system.

This favourable attitude towards diversity in the school environment and, more specifically, in the classroom was not nurtured by professional development policies and practices, and there was no system to evaluate the performance of teachers. For these reasons, institutional agents were undoubtedly a precious human resource, and a fundamental pillar to ensuring that many students were included. The identified institutional agents included: 1) teachers who developed their own sign language to work with students with hearing impairments, 2) principals who

built new classrooms and expanded coverage by increasing the school capacity, and 3) a teacher who specifically supported an absent student at risk of dropping out of school and becoming a street child. In this manner, local actors acted proactively to solve problems on their own. These efforts were often unrecognized by the education system and, thus, there was little awareness about how they contributed to education. Therefore, institutional agents are key implementers and facilitators of inclusive education in Guatemala because they are able to forge solutions to barriers against inclusion.

Spontaneous solutions were likewise found to contribute to the success of inclusive education in this study and others (Easterly, 2014). Such answers are coined in response to the fact that external experts are generally hired to solve problems (e.g., poverty) with technical solutions that do not consider the rights of the affected people to find their own explanations and solutions to their problems from their own perspectives. In the present study, the term 'spontaneous solutions' refers to the initiatives and responses that stakeholders produce extemporaneously in order to solve concrete demands or problems that impede inclusion. We documented these kinds of solutions across contexts and actors. Examples of spontaneous solutions include the coordination of actions among local community members. Hence, the education system in Guatemala has institutional agents who create spontaneous solutions to confront barriers and create opportunities in environments with very few possibilities.

Spontaneous solutions are of great relevance to inclusion in Guatemala, considering the co-existence of complex paradoxes and challenges that include a history of colonization and the attendant legacies of centralized bureaucracies and their mechanisms, which have resulted in differential access to resources and participation, political repression, and the emergence of a democratic system in this nation. Spontaneous solutions include at least two facets: A dimension of personal self efficacy, i.e., the beliefs and coping behaviours needed to complete tasks and reach expected goals (Bandura, 1977), and a dimension of human agency, i.e., the power an individual has to support changes in social structures, traditions, institutions, moral codes or established ways for doing things (Giddens, 1979). The spontaneous solutions implemented by stakeholders at all three levels of the national education system are exemplified in the next chapter. This is a positive finding that supports the notion that any person can make important changes and promote development. However, structural changes in the education system cannot be made based on this alone, but also require a clear picture of the expected results and clear indicators to evaluate the progress of the implementation process and the impact of inclusive education.

5 Discussion

It is important to note that the meaning of the terms 'inclusion' and 'exclusion' should always be understood in the specific contexts in which these ideas are practiced. In the developed world, educational inclusion has been related mainly to the rights of specific groups (e.g., learners with disabilities, immigrants, and racial minorities) to participate in regular schools and/or debates about the advantages or disadvantages of receiving specialized but segregated educational services (Booth & Ainscow, 2002). Exclusion, on the other hand, has been related to particular unreachable groups in developed societies who need to be part of the education system, or to students barred from school due to personal difficulties, such as behavioural problems at school (Black-Hawkins, Florian, & Rouse, 2007; Booth & Ainscow, 2002). In developed nations, some students fail to finish school because they do not find it interesting or they do not accomplish the expected results. Schools in developed countries also have difficulties affecting the quality and results of the learning processes (Ainscow, 2004).

Our evidence shows similarities and differences in inclusion and exclusion factors between developed and developing countries. Guatemala has educational policies aiming to enhance access to education for all learners. However, school completion is still a problem (Instituto Centroamericano de Estudios Fiscales & UNICEF, 2011), as reflected by the number of students who decide to drop out of school before graduation. Exclusion, on the other hand, is largely influenced by social, cultural, economic or historical factors that prevent people from making education a priority and fully participating in the education system. However, this is something that also happens in developed nations. In Guatemala, exclusion not only concerns the right to education, but also other human rights that are inaccessible because of many historical and socio-economic reasons, all of which negatively impact education. This is something that has been reported before in other developing nations (Kalyanpur, 2011).

In addition, the concept of inclusive education is full of tensions and discordant ideas that need to be considered when planning programmes and strategies. Important questions to be addressed include how to ensure quality educational services for learners in rural areas? How to properly support over-age learners at regular schools and migrant students who miss part of the school year? Citizens of developing countries put their hopes in education as a mean of personal development and self-fulfilment. On the other hand, public schools do not give everybody equal education quality, equal opportunities to learn according to one's own capabilities, and educational services that meet the needs of the job market. As a result, the right to education seems to have different levels of relevance, and the lowest one comprises the most vulnerable and unprivileged children, because they get less benefits than other learners from the same education system. Consequently,

schools in Guatemala not only fail to reverse inequalities, but also unintentionally contribute to perpetuating them. Our study showed that less privileged citizens regard education as something that is desirable, but also unreachable. This is one way in which the vicious cycle of inequity and injustice in Guatemala continues.

The reality of the inequality of benefits from the educational offering is not unknown to the stakeholders in Guatemala, as shown by the evidence collected in this study. Examples include the lack of bilingual education services for children speaking one of the country's many languages other than Spanish, the difficulties facing multi-grade schools, or the lack of inclusive schools throughout the country. These problems are well-known to educational authorities, not only at the micro level where the needs are present, but also at the meso and macro levels. As Marchesi (2000, p. 135) put it, "educational inequities are not originated in the education system, they get worst there". Thus, exclusion and inclusion have been interlocked in an ongoing historical struggle, and the greatest pain is consistently felt by the most vulnerable groups.

How can developing countries with limited resources be expected to tackle the multiple causes of inequality across sectors? In our view, there are two complementary approaches for further analysis of the process and progress of inclusive education in developing countries. One is to look at the education system itself as a lever for change and innovation instead of trying to "fit every person into the same suit", as described by Ainscow (2004). The other is the ecology approach for fostering equity within educational systems which, as proposed by Ainscow, Dyson, Goldrick and West (2013) requires the analysis of interrelated aspects: 1) the role of external contexts and environments (demographic, cultural, historic, and socio-economic components), 2) the learning processes taking place in the schools (implementation of policies and practices), and 3) the collaborative role of the local school system. Hence, there are three interlinked arenas in which equity needs to be addressed (Ainscow et. al., 2013).

The evidence confirms our initial assumption that the two things needed for a successful inclusive education system are 1) stakeholders with a common and shared view of inclusive education at all levels of the system, and 2) a management model for coordination of all three levels of the system. This ecological perspective could be an interesting approach to understanding the resources, roles, and regulations that make inclusive education systems work. We suggest adding a theoretical frame of community into the ecology of equity, because we believe that a sense of belonging could improve acceptance of diversity as an opportunity for improving social inclusion. Moreover, institutional agents and spontaneous solutions would be resources for equity-creating changes originating from the local contexts, but having a common orientation and equal quality of educational opportunities.

6 Concluding Remarks

Based on the evidence, we conclude that the participating stakeholders in the Guatemalan context viewed inclusive education as a positive approach to improving education for all, but were uncertain about its added value for improving the benefits of education in their country. The stakeholders were clearly aware of the multifactorial barriers that interfered with educational access and school completion. Those who were directly involved in the daily operations of schools recognized the challenges and barriers for promoting participation and acceptance among students with diverse personal characteristics and ways for learning. The key challenges for all involved how questions such as:

- How to innovate and transform an education system in a society rooted in inequality and injustice?
- How the education system should respond to human diversity and confront social inequities?
- How to give all citizens equal and significant learning opportunities?
- How to improve the quality of educational services with limited resources?
- How to promote meaningful educational programmes that drive to social inclusion?
- How to prepare teachers according to the expected results of an inclusive system?
- How can schools change those practices that have promoted exclusion?
- How can educational communities support efforts to improve education for all?
- How to link inclusive education to social inclusion?
- How to manage the education system according to an inclusive perspective?
- How to connect educational policies to social policies?

The list could go on and on. The main idea is that inclusive education is a team effort that cannot be accomplished by the education system alone. The success of inclusive education requires strong leadership and guidance from the education system, and the backing and support of the whole State apparatus. Moreover, it calls for a solid commitment to respect the rights of all persons, the technical and financial capabilities needed to promote significant learning opportunities for personal development, and an 'open-door policy' that ensures that all citizens have the education needed to create a respectable place for themselves in society.

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3.2 Inclusive Education in Developing Countries: Two Case Studies from Guatemala

Previous research on inclusive education in Guatemala focused mainly on students with special educational needs with or without disabilities (refie, 2015). Our purpose was to provide the Guatemalan Ministry of Education (MINEDUC) and international development agencies with research evidence that would support future actions to improve accessibility, acceptance and participation in quality educational services. A central assumption of this research project was that inclusive education is relevant to the education system's efforts to reduce exclusion, promote social mobility, and thus improve the well-being of Guatemalan citizens. The right to educational opportunities is a constitutional obligation in Guatemala (Constitución Política de la República de Guatemala, 1985), and the country has signed different international conventions aiming to meet the learning needs of all children, youth and adults, such as Education for All (United Nations Educational, Scientific and Cultural Organization [UNESCO], 2000; MINEDUC & UNESCO, 2014).

The core assumption of this study rests on a wealth of evidence showing that education plays a fundamental role in the promotion of social mobility (Iannelli & Paterson, 2005). Boudon (1974) defined social mobility as the differences in social achievement according to the social backgrounds of individuals. In other words, social mobility depends on the relationship between educational attainment and social status. Moreover, the capabilities or competencies that a person develops through education are related to the social position that he or she occupies in a meritocratic society (Boudon, 1974, p. ix). Factors such as family background, educational opportunities, and the levels of educational qualifications that a person attains are associated with his or her job opportunities and social position (Iannelli & Paterson, 2005). According to Iannelli and Paterson (2005), educational policies have the power to improve access to education and increase the equality of opportunities. The success of these policies has been considered in relation to other economic, health and social policies.

As we described in the previous chapter, the social mobility of a sizable proportion of Guatemalans is still at risk because many children are unable to attend school regularly as needed to develop basic competencies for success in life. Even though the state has been working for more than 20 years to improve access to education

and the quality of educational services (UNESCO, 2014), barriers remain that prevent students from finishing school as expected. These obstacles are mainly confronting indigenous people living in poor conditions, predominantly in rural areas, as well as non-indigenous people living in poverty and other vulnerable groups in Guatemala (refie, 2015).

Inclusive education is a global movement that has been a topic of interest around the world for many years (Artiles, Kozleski, & Waitoller, 2011). Previous research has shown that there are similarities and differences between developed and developing nations regarding their understandings and expectations of inclusive education (Artiles et al., 2011). Three outcomes from previous research are of particular interest for us:

1. For developing as well as developed nations, the establishment of inclusive education systems remains an unfinished assignment. These nations have a common hope that inclusive education will contribute to building equity in the education sector and thus in society (Löser & Werning, 2015; Mariga, McConkey, & Myezwa, 2014).
2. Developed nations have been largely concerned with attaining a better distribution of resources and opportunities so that mainly marginalized social groups can benefit from these measures. These groups have been classified according to race, native language, citizenship, physical and cognitive abilities and other characteristics (Dyson, Jones, & Kerr, 2015; McDermott, Edgar, & Scarloss, 2015). The main intentions of such classifications are to allow education systems to better serve and invest in those groups and to define measures for evaluating the progress of interventions and policies (McDermott et al., 2015).
3. Historically, inclusive education research has targeted people with special educational needs (Singal, 2010). However, there is a growing interest in the inclusion of other vulnerable groups. In developed nations, such groups include immigrants and refugees. Research has also shown that the number of students in special education services coming from vulnerable or minority groups has increased in these countries (Berhanu, 2015).

We concluded that these research findings were an important key to identifying these groups in Guatemala and to understanding why they are unable to study or complete school as expected. Therefore, we looked for groups excluded from education or 'left behind' because of different historical, socio-economic, ethnical, and political reasons. We aimed to pay close attention to external factors and their possible interrelated effects on individual educational needs, as previous research in Guatemala has pointed out such issues (Instituto Centroamericano de Estudios Fiscales [ICEFI] & Fondo de las Naciones Unidas para la Infancia [UNICEF], 2011). Thus, our research focused on indigenous people, rural populations, poor

communities, girls and women, and youth and people with special educational needs with or without disabilities.

During the research process, we noted that these initial assumptions were not easily transferred to the Guatemalan context for two reasons. First, it was difficult to apply the same criteria to define vulnerable groups due to the risk of excluding other groups. Second, challenging issues emerged during interviews and focus groups conducted in this research project when the idea of inclusion was the topic of debate. Guatemala is a nation characterized by prevailing inequities (United Nations Development Programme [UNDP], 2005). During the project field work, difficult unresolved questions such as *inclusion into what*? came up in many discussions with participants and research team members. Another provocative question was how to consider structural barriers in one of the most unequal societies in Latin America (Justo, 2016). From the beginning of the research process, we noticed that in the Guatemalan context, inclusive education was not seen as an isolated engine for social inclusion. As previous research has shown, inclusive education should be pursued as part of a more ambitious multi-sector agenda for human and social development that also encompasses goals such as the provision of quality health care and the reduction of poverty (Kalyanpur, 2011).

Our research also focused on whether the concept of inclusive education could be better understood if individual learning needs and contextual factors were considered as interrelated factors. Accordingly, we viewed exclusion from education as the result of a combination of individual educational needs and contextual factors. The following quote from a stakeholder from the international cooperation points this out:

> It would be necessary to differentiate between individual barriers and collective barriers, and admit that, in the country, there is a powerful structural barrier. The powerful structural barrier is that although the country recognized the discourse of education as a right, the education system continues to behave as if education were a privilege only for certain elites, namely, [the] non-indigenous urban population with no special needs. This concept is immanent within the education system. The education system is designed to perform this way, and this is a structural barrier. As you can see, we don't provide attention to those who have special needs because we don't even provide attention to those who don't have these needs; we don't give it to the indigenous [groups], why educate indigenous peoples if what they do is plant corn; we don't provide education for people in the rural areas for the same reason, or to girls. So there is a group of elements that are present, not only in the way in which state institutions behave, but also in the collective imagination, which accepts this as normal—exclusion as a part of life. (National expert on education working in the field of international cooperation)

There are many lessons to be learned from our research when approaching the creation of an inclusive education system. One of the most relevant lessons is that in developing countries such as Guatemala, the main causes of exclusion to edu-

cational services are related to the lack of opportunities or available resources for all. The underlying causes are mainly societal conditions such as poverty or deep seated inequalities in society—conditions that constitute the common denominator for most of the population. These issues are illustrated and discussed in the following pages.

As it was explained in the previous chapter, our research focused on three levels of the Guatemalan education system:

- Macro level (education policy-makers and national leadership);
- Meso level (intermediary stakeholders) and
- Micro level (school stakeholders).

Six schools were selected to illustrate the challenges of delivering inclusive educational services in the country. We report two representative school case studies in the following pages to summarize current efforts to promote education for the Guatemalan population. Each school had a unique set of challenges and priorities, characteristics and demands. The first case study school (referred to here as an 'inclusive slum school') was officially named as an inclusive school by the Ministry of Education. The second one was a multi-grade school located in a remote rural area. Both cases provided valuable knowledge about what inclusive education means and how it is seen at the different levels of the Guatemalan education system.

After presenting the case studies, we will discuss different perspectives and lessons learned that should be taken into consideration in future efforts to implement inclusive education in developing countries. However, before we present the two case studies, we discuss the definition of two concepts that are critical for this research: Students with special educational needs and the conceptualization of an inclusive school.

The Guatemalan Ministry of Education (2008; 2011) defined "special educational needs with or without disabilities" as those needs experienced by any person who, "due to particular circumstances, is at a disadvantage and has greater difficulties to benefit from the academic curriculum that correspond to his/her age, and therefore requires assistance or special aid for learning. Some people could also have physical, mental, intellectual or sensory disabilities or impairments, which are conditions that could limit or prevent their participation in educational programmes". In addition, the Ministry of Education (2013b, n.p.) defines an inclusive school as one that "does not have any kind of selection or discrimination mechanisms, and transforms its duties and pedagogical offerings in order to integrate the diversity of the student body, favouring social cohesion, which is one of the goals of education".

1 Case Study School 1: Inclusive School in a Slum Area

1.1 Institutional Structures and Contexts for Inclusive Education

The Ministry of Education launched its inclusive education policy for the population with special educational needs with or without disabilities in 2008. By 2013, five years later, there were three programmes dedicated to serving children with special educational needs. Two of them had been established before this policy was implemented. The first was a special education schools programme with special education teachers. The second programme, which followed an integration approach, was known for placing 'resource rooms' in regular schools under the responsibility of special education teachers or psychologists. These programmes, which already existed when the current policy went into effect, have been continued, albeit with some changes in their orientation. The goal of the third programme, launched in 2008, is to achieve the inclusion of students with special educational needs, allowing them to attend regular classrooms, and to promote their acceptance by and participation with other students while being taught by regular teachers, with the support of itinerant pedagogical advisors (MINEDUC, 2008).

Until very recently, preservice and in-service teacher training programme curricula did not include inclusive education or special education as mandatory courses. However, since the Ministry of Education granted students with special educational needs access to regular schools, governmental and non-governmental organizations have undertaken efforts to strengthen the initial preparation and continuing education of teachers in this field. Also, a national programme for teachers' professional development that includes a course on inclusive education is now being implemented at the state national university. Before that, the educational programmes that had existed in the country for several decades had been offered by universities based on a clinical model focused on language, learning or sensory impairments. These programmes were not required for all teachers, but were available to those preservice teachers interested in these topics.

In 2013, 12,269 out of 33,403 schools (37 %) in Guatemala served students with special educational needs. This included 2,824 inclusive schools with itinerant pedagogical advisors, 7,435 inclusive schools with a special education teacher (these were the schools that had previously included resource rooms at regular schools), and 2,010 special education schools (MINEDUC & UNESCO, 2014, p. 116).

1.2 The Target School: An Inclusive School in an Urban Slum Area

This case study involved one of the inclusive schools with itinerant pedagogical advisors that had been identified by the Ministry of Education as having successful inclusive education practices. Itinerant pedagogical advisors are professionals with degrees in special education or psychology. In Guatemala, they are assigned to serve several schools in a geographic region supporting teachers and principals for the ultimate benefit of inclusive education. Such support includes professional development, assessment, and consultation with teachers on inclusive curricular and instructional practices.

This school was located in a municipality of the Department of Guatemala, close to the capital city. This municipality, which was considered a commuter town, had a poverty rate of 24 %, and an extreme poverty rate of 2.3 %. Compared to the national rates (53.71 % total poverty and 13.33 % extreme poverty) (Instituto Nacional de Estadística [INE], 2011), this community had better living conditions than the national average. However, members of the community characterized their location as a 'red zone' because violence and insecurity plagued the neighbourhood.

Access to the school was via a concrete road, which ended around 100 meters before the main entrance to the school building. The street in front of the school was a dirt road on a sloping and rocky surface. Regarding the school infrastructure, the school buildings were made of materials of different quality. The classrooms in the worst condition had wood plank walls, a tin roof, and a dirt floor. The other buildings were in better condition, but still not good enough for proper learning. In general, all of the classrooms had poor illumination and ventilation and were extremely exposed to dirt. Recreation and circulation areas had uneven surfaces with rocks, tree roots, steps, and damaged sidewalks. Directly adjacent to the school was a creek, which had eroded the ground where the student restrooms were located, causing a safety hazard. In the classrooms, learning resources—including textbooks, notebooks, desks, and chalkboards—were limited. The school did not have a library, computer lab, or teaching materials for students with special educational needs.

This inclusive school was a public mixed school that served students from preschool to sixth grade. It opened its doors to children with physical disabilities: "Kids with paralysis who cannot move", as the Headmaster referred to them. According to the Headmaster, there were a total of 614 students, 534 in primary school and 80 in preschool. Among them were 16 students identified as children with special educational needs, including children with Down syndrome, cerebral palsy, sensory impairments and autism. There were also students facing difficulties or challenges, such as family disintegration, parental alcoholism or migration to the United States, family migration within or outside the municipality, domestic violence, and parents with criminal records. Access was limited due to several

barriers, including scarcity of public transportation and the topography of the surroundings. Nonetheless, the children with physical disabilities found their way to school despite the rough conditions outside and inside the school building. Access to the different areas of the school campus was difficult. For example, bathrooms were located at the very back of the school.

1.3 The School Population

Regarding the ethnicity of the residents in the community served by the school, most were Ladinos[1], whose mother tongue was Spanish, and 3.8 % were Kaqchikeles. This means that at least two ethnically different groups lived together in the municipality. According to the Municipality Development Plan (Consejo Municipal de Desarrollo, 2010), most of the population (66.5 %) lived in an urban area, and most (91.7 %) were literate.

Education indicators for the municipality showed that gross enrolment was 106.4 % at the primary school level 2, but only 55 % at the preschool level, and 46.4 % at the middle school level. High school enrolment was very low—only 4.4 % (UNDP, 2011). As these statistics confirm, substantial challenges remained in terms of accessibility to preschool at the beginning of the school period as well as to successfully making the transition between the primary level and middle school.

Furthermore, gangs known as 'maras' committed crimes in the community, creating an atmosphere of fear and danger for every resident, including children and young people. Nobody was free from such threats inside the school either, since students associated with these groups reportedly also attended school. Moreover, alcohol and drugs were accessible for students in the school. One teacher offered the following example of this situation:

> I have a student in my class; he had a problem with his teacher last year, because she found out he had problems and told his mother, and so they threatened her. And so this year they transferred the kid to my class. I still don't know if he keeps contact with those friends he used to have, if he still sells or buys drugs, or I don't know if he has done it, if he has taken drugs or not, but it is a problem I see amongst my students. (Teacher)

Moreover, everyone at the school did not have the same familial socioeconomic status. For some parents, it was financially challenging to keep their children in school. During interviews and focus groups, stakeholders reported some cases of students who had to work in different kinds of jobs, for example, as masons, elec-

1 Ladinos are Guatemalans of Mestizo descent (mixed Spanish and Mayan) whose mother tongue is Spanish.

2 This figure includes overage students.

tricians, mechanics, and 'tortilleras' (persons who make tortillas), or washing and ironing laundry, and so forth. As one student from the school said:

> They are repeating the grade because they were retained. They missed too many school days because of a complicated financial situation, which forced them to go to work in the morning in order to help their families. Some of them sell candies [in the street]. I have a friend that polishes shoes … he goes to town and polishes shoes. (Boys' Focus Group)

According to teachers, some of the students with especially difficult conditions for learning had emotional, behavioural, and self-esteem problems. Pregnant teens and over-age students were also enrolled in this school. In summary, this inclusive school was located in a highly vulnerable social environment, and its students were challenged by access barriers as well as difficulties to stay in school.

1.4 Views on the Practice of Inclusive Education: Lessons Learned

Inclusive education was not a clear concept for all members of the school community; most of them automatically related it to children with special educational needs. For members of the school community (i.e., teachers, students, and parents), the idea of inclusive education was related to the acceptance of children with special needs in their school. This might be due to the fact that this was the only school in the municipality that allowed children with special educational needs in its classrooms.

Three views emerged from the interviews and focus groups. The first was the agreement among participants about inclusion being a universal human right, regardless of one's particular needs or living conditions. However, given the socioeconomic conditions of the target population, inclusive education was a means to achieve social inclusion. The second was the disconnect between the government's promise of inclusive education and the inequitable living conditions of the population. Third, it was challenging for teachers to appropriately address student diversity in the current classroom settings.

1.4.1 Of Rights and Means: The Promises of Inclusive Education and Social Inclusion

Evidence shows that through actions taken based on the Guatemalan inclusive education policy, the right to education for people with special needs could be realized in a regular public school. The Ministry of Education had created conditions for the promotion of inclusion, for example, through scholarships for children with special educational needs from poor backgrounds who faced difficulties going to or staying in school, and pedagogical advisors who supported teachers serving students with special educational needs. However, our evidence also sug-

gests that, despite these efforts, barriers to access, acceptance, and participation persisted at the school level in the case of students with special educational needs and socially vulnerable students, as explained in the previous paragraphs. Inclusive education was a substantial challenge because the majority of the population was poor, and realization of the right to education was not possible unless additional resources (e.g., security, school meal, scholarships) were provided by the state. The people who participated in our research project referred to social inclusion rather than to inclusive education. For them, education was a vehicle for achieving social inclusion. Parents stated that education was needed to achieve a better life, better opportunities and better salaries in order to provide security for their families. An official from the Ministry of Education described the relationship between inclusive education and social inclusion as follows:

> It is necessary to study to get a good job … and that shouldn't be the only reason. That is, it is necessary to study to improve yourself to get to be someone, to integrate into society—not a consumption society but a society of knowledge. It is necessary to study not only to get a good job. (Official of the General Directorate of Education)

In summary, it was well accepted among members of the school and its community that every child should have the right to education without discrimination. However, upholding their children's right to education and social inclusion required additional resources and capabilities beyond the school's control.

1.4.2 Caught in Ambiguity: Grappling with the Promises and Instrumental Value of Education and Inclusion

Our study participants viewed education not only as a right, but also as an aspiration. The lack of access to formal education was considered a lack of freedom, even in the simplest daily life situations, and as a factor perpetuating exclusion. One mother explained:

> I don't want them [her children] to remain like us. We don't know a thing. I tell them 'At least you're going to learn something'. At least they'll know something, because I know it's necessary. Everything requires a minimum of schooling. I tell them that, sadly, we didn't have the chance to be sent to school. For example, someone gives us an address and we don't know where to go. They tell us 'Come here by bus', and it's like we're blind because we don't know which bus to take … Sometimes … when we ask for help, and they tell you 'Aren't you embarrassed for asking the address?' And so, I tell my kids what we've been through. I don't want the same things happening to them. (Illiterate mother in a focus group of parents)

Our evidence also showed that participants' hope about the availability of quality education for everyone was challenged by the poor life conditions in which they lived. Participating parents, teachers, children and adolescents expressed a desire

and high expectations for education, but also shared doubts about the benefits of the knowledge and skills learned at school. They were concerned about the return on the investment of several years in school, given that many useful things learned outside of school allowed families to survive. For example, one study participant worked at a farm for a few hours each day before going to school. Because he played the dual role of worker and student, he was required to 'multitask', i.e., perform his routine job responsibilities, manage stress, and act responsibly at his work and school environments. For students like him, inclusion in income-generating activities was possible despite the obligation to attend school. This reality fuelled parents' and youth's doubts about the ultimate benefits of formal education. However, the parents believed that education was the key to entering the workforce and succeeding in the labour market. As one parent said, "The work you find matches the school grade you completed". However, several parents and teachers also mentioned that education did not always lead to finding a job. One teacher lamented, "Why become a lawyer or engineer if you can't find a job anyway? So it [is] better to work anywhere else. … You end up working on things for which you didn't need to study". Therefore, the aspirations of some participants were limited to developing the basic skills needed for a productive life that would allow the students to contribute to their own and their family's survival.

The deep historical inequities of this country, reflected in persistently high levels of unemployment against the backdrop of the accumulation of wealth and concentration of the control of production systems among a small percentage of the population, had eroded the power of education to provide social mobility. This situation had left the study participants suspended in a liminal space. On the one hand, they believed that every child had a right to education, as promised by the state, but they also realized that enormous investments were still required for the true realization of education's promise; they had doubts about whether completing formal education would actually help children improve their socioeconomic situation and overall wellbeing.

These examples illustrate how participants envisioned tensions between the skills that the students learned in labour activities competed with the development of competencies or skills acquired in school. Both work and school were undoubtedly important for the life of any person. However, the competencies acquired through formal education would not necessarily be needed for the jobs performed during childhood or adolescence. This situation underlined the value and relevance of education programmes, particularly in areas with substantial socioeconomic challenges where child labour was pervasive. Thus, in order to promote the inclusion of vulnerable students, including those with special needs, the case study school was compelled to adopt relevant learning practices in response to the socioeconomic realities prevailing in the community. The circumstances of this school demanded that inclusive education built bridges between what was learned

at school, what was required for work, and created opportunities for social inclusion for all.

At the same time, it is important to point out how relevant it was, particularly for students with special educational needs, to have access to the inclusive slum school. The opportunity to attend school was perceived as fundamental for their sense of belonging to a social group. The historical educational exclusion of this disadvantaged group has been so dramatic in Guatemala that being granted access to a public school constituted a major life achievement. The following quote from a mother of a child with cerebral palsy illustrates this point:

> My boy is in third grade. He has cerebral palsy. Thank God here in this school I found the aid of the headmaster as well as the teachers. My boy has been here since he was five years old. He is very happy at school because all the teachers and the headmaster have always supported him, and supported me. (Mother)

In conclusion, the evidence shows that living in a community and a nation with deep social and economic inequalities led participants to question the value and returns of an education, while they hung on to the hope that education can make a difference in a person's life. The relevance and mobility power of inclusive education was also questioned, but at the same time, participants saw that inclusive education could build bridges and promote innovation in educational programmes, learning methodologies, and school goals, and that it could create opportunities for social inclusion for the most vulnerable and excluded groups of communities.

1.4.3 The Distance Between Ideal Movements and Professional Practices

The third perspective on inclusion was related to the way in which this inclusive school served children with special educational needs and students who had not been diagnosed as such, but had substantial needs and vulnerabilities. A recurrent question was, *How* referring to the urgency of finding adequate solutions for implementing inclusion in terms of access, acceptance and participation.

Regarding the dimension of access, it was apparent that this school was able to implement inclusive education for students with special educational needs due to the willingness of the school principal to open the school to them. This was in stark contrast to the situation in the rest of the public schools in the same municipality. All schools in Guatemala have to meet the official requirements and obligations to allow all students to attend any regular school without discrimination for any reason, but compliance depends on local willingness. The following quote illustrates this fact:

> I see that definitely all students have the same right, no matter if they have physical impairments, or socioeconomic troubles. However, not all of us fulfil those rights in the way it is written in the law. In practice, it is not fulfilled. It was last year when we

> learned about special education for the first time. We received training on it. We have also received visits from the Departmental Directorate of Education, and in different meetings we have heard that we must fulfil the right of education for all students. All of them have the right to be included with the rest of students at the school. But the truth is that not all of us do that. There are students who have been rejected from schools. So here in this school, we definitely receive all the students without restrictions related to anything like religion, socioeconomic status, or physical special needs. We welcome all of them. And though we know that we are not well prepared for teaching them, my colleagues do their best. They do great things with their students. (Headmaster)

Meso-level stakeholders, particularly the Departmental Directorate of Education and the itinerant pedagogical advisors, supported students with special educational needs and, hence, the school's practice of inclusion. At the macro level, the General Directorate of Special Education of the Ministry of Education (DIGEESP) also provided support by granting scholarships to students with disabilities. The positive attitude of teachers receiving students with special needs also stood out. They welcomed children with special educational needs in their classrooms even when their knowledge of how to teach them was limited.

Access to the school was also made possible by the enormous efforts of parents to support their children's participation in school. We witnessed several examples of how inclusive education for children with special educational needs would not have been possible without their mothers' commitment and unconditional support. In short, the actions taken at this inclusive school show that it is possible to improve access for people with special educational needs in regular classrooms. Inclusive education became successful when stakeholders from all three levels of the system worked towards this goal.

Differences in the students' acceptance of classmates with special educational needs were observed. Some students were positive and supportive while others expressed uncertainty about how to properly interact with special education students and, on a few occasions, showed disrespect. We observed students helping a child who had difficulties moving around, and they played together with him without discrimination. Conversely, we observed interactions in which students mocked a student with Down's syndrome, but some teachers did not consider this behaviour inappropriate enough to intervene. We therefore conclude that the fact that children with special educations needs had access to school did not necessarily translate into acceptance by all of their peers. Moreover, inclusion did not mean either that all teachers at the school were willing to assist children with special educational needs to be accepted and respected by others. Many teachers reported that children with special educational needs with or without disabilities seemed to be more accepted by their classmates than students who exhibited violent or aggressive behaviours or disrespected the school rules.

The evidence on participation reflected a complex state of affairs. First, teachers who worked with learners with special educational needs in their classroom were usually proactive and managed to solve the challenges that arose when working with these students. For example, one teacher developed her own sign language to communicate with one of her students who was deaf. The positive attitude the teachers showed towards including students with special educational needs helped to develop respectful relationships and solidarity among classmates; to wit:

> They saw him like 'Why doesn't he speak?' And so you had to tell them 'Look, he is just like you in many ways but, sadly, he doesn't have the ability to speak or move like you do, but he's just the same as you.' What you have to do is help him. And they encouraged him, and played with him; they included him in everything. During the recess, they helped him carry his food; I remember that in that time, you still had to feed him. Sometimes they fed him. They saw me walking beside him, carrying him by his hand or whatever, and everybody was like 'Can I go now, can I help him now?' And he had many friends that played with him. They used to take care of him and helped me take care of him. (Teacher)

Despite the positive attitudes shown by teachers, our evidence also indicates that a good disposition alone was insufficient to promote learning in the classroom. Teachers reported limited knowledge on how to teach students with special educational needs. They thought that inclusive education was a positive development, but they thought special competencies were needed to ensure successful learning experiences. Doubts and uncertainties were present regarding their learning and teaching approaches. For example, practices for promoting inclusion remained unclear, as evidenced in a comment by one of the participants in a focus group:

> The teacher was telling him 'If you can't hear, then sit there'. And so he couldn't pay attention and came home sad; he didn't want to return to school. (Teacher)

Moreover, the teachers wanted to learn how to teach students with special educational needs to be fully accepted and actively participate in the learning processes, even though they required different teaching approaches. The following quotes exemplify this:

> I have four kids with special needs in my class, and they're not an extra burden, but you do have to pay special attention to them … So the situation inside the classroom gets more and more complicated, and the kids get restless. You have to keep them working. (Teacher)

> Because of his disability, he can't keep up with the rest [of the class] and, given the number of students each teacher has, sometimes it is hard. Because a colleague who has a child with a mental disability has 40 students and needs to provide a separate space for him so, logically, no. As she says: 'I do what I can'. (Teacher)

The teachers also expressed the need to know more about how to implement inclusive education in order to promote learning in their diverse classrooms. They planned and implemented learning activities without necessarily making curricular adaptations for other students who had not been diagnosed with special educational needs, but who might also benefit from differentiated instruction. The evidence from this case study indicates that some students were diagnosed as having a disability or special educational needs by professionals who were not qualified to do so. The headmaster of the inclusive school showed one document exemplifying how one child was misdiagnosed as having learning disabilities by a physician from a public health service. In addition, educational counselling had been oriented exclusively to students with special educational needs.

Because of this, teachers used one set of learning strategies for all students, regardless of special needs. Therefore, one priority for the future of inclusive education is to work on a pedagogy of inclusion that focuses on providing differentiated educational opportunities and building support networks for social inclusion—the ultimate goal of any educational process (Florian & Black-Hawkins, 2011).

In summary, stakeholders at the inclusive slum school pursued a positive vision of inclusive education. This was possible due to two factors: 1) the commitment of the Headmaster, teachers and parents, all of whom worked together to guarantee access and learning opportunities for students with special educational needs, and 2) the coordinated action of the educational system, including compliance with regulations and the provision of human resources by the macro level, the intermediary role played by the Directorate of Education at the meso level in the coordination of regulations from the macro level and their implementation at the school level, and the active involvement of members of the educational community in creating a positive school climate for students with special educational needs. The strong emphasis on children with special educational needs was due to the fact that they continue to be the main target group in Guatemalan inclusive education policy.

2 Inclusive Education in the Midst of Inequality: The Case of a Rural School

There are different types of schools in Guatemala. A school may have one teacher per grade, one or more teachers for two or more grades, or one teacher for all grades, corresponding to a graded, multi-graded and one-teacher school format, respectively. Moreover, there are bilingual (e.g., Mayan/Spanish), monolingual (Spanish), and inclusive schools. Their purpose is to provide appropriate attention to diverse populations according to their age, language, and place of residence. Among the six schools studied, we report on a multi-grade, bilingual (K'iche'/Spanish) school serving a rural community with a low population density. This case study school illustrates the conditions and challenges of education in rural areas in Guatemala.

2.1 Multi-Grade School and its Community: The Challenges of Inclusive Education in a Remote Rural Context

At the time of the study, 6,795 (42.15 %) of the 16,118 primary schools in Guatemala were multi-grade schools taught by two or three teachers, and 2,179 (13.51 %) were schools taught by one teacher. These multi-grade and single-teacher schools were located in rural areas of the country. According to the Ministry of Education, 80.8 % of all primary schools are located in rural areas (refie, 2014b). The second case study school presented in this chapter is a multi-grade school located in a remote rural area. K'iche' is the native language of the majority of the community's inhabitants. During the study, the school had 63 students and three teachers assigned to teach preschool and primary school in three classrooms. One teacher was in charge of fourth, fifth, and sixth grade, the second taught first and second grade, and the third teacher, who was also the headmaster, taught preschool and third grade.

The community is located in the Department of Quiché, 202 kilometres northwest of Guatemala City. The roads from Guatemala City to the school are mainly paved, but 40 kilometres are unpaved roads in bad condition, which severely limits access to the school and its community. Because access is through a dangerous mountainous road, people in this community have limited means of transportation. Economic and commercial activities are also constrained by this infrastructural problem. A key characteristic of this community is the inequality in the living conditions of the people and their limited access to basic services, such as electricity, roads, and sewage systems. This community represents the reality of life in isolated rural communities and poor communities in Guatemala. The living conditions in these areas seems to generate a self-perpetuating cycle of poverty.

Most of the community's inhabitants cultivate corn and beans during the rainy season (May to October) and raise animals like sheep, goats, and hens. These ag-

ricultural activities are only for family subsistence. Some of the study participants stated that there were no employment opportunities in the area that ensured a steady income for the local families. This perpetuates the cycle of poverty in these households. A leader working in the municipal government described the community as follows:

> I understand that these are the only municipalities with no access roads. And you know that if there is no way to access the place, [no way] to get there, there is no development … This community doesn't even have the main institutions. We have no bank … Here they produce and store … It is barely enough for the whole year. During the rainy season there are few jobs cleaning the corn fields, getting ready to plant, but like … in the summer, there is nothing. Everything dries up [and] there is no work. (Local leader, Interview)

We identified three perspectives on inclusive education among school stakeholders in this community:

- Education rights in the midst of structural violence: Unfulfilled promises
- A paradox of inclusive education: Social mobility of assimilation?
- The tyranny of the universal learner: Persisting standard pedagogical practices in diverse classrooms

2.2 Education Rights in the Midst of Structural Violence: Unfulfilled Promises

The stakeholders in the community recognized that education is a right for all and that education is important for a person's individual and social development. There was an awareness that individual rights have been improving in the country. However, the participants also thought that the government's promises of a basic right to education were not being met for all children. Although there were public policies and laws advocating education rights and the State was obligated to provide education to all children, rural areas posed complex barriers to this right. The community had only one school—a multi-grade school with a preschool and primary education programme. Thus, sixth grade was the highest level of education provided by the State, and there were no secondary or vocational schools available to the school age population in this community. The municipality consisted of 32 rural communities but had only three rural schools and one urban school offering grades 7 through 9. One parent described this structural barrier to educational opportunity as follows:

> Another example is that children finish the sixth grade and would like to continue and enrol in an institute [i.e., secondary school], but the institute is located very far away, so they don't. The same thing happens to those who finish the ninth grade at the basic secondary level in the villages where there is a secondary school … .They don't continue

> because they would have to go to Quiché, where they would need to pay for accommodation, school fees, and other things, so the children can't continue their studies. (Parents Focus Group member)

Financial challenges exacerbated this lack of opportunity. Participants mentioned that there were no scholarships to help students with their studies after primary school. One of the parents stated:

> I believe it is important to have scholarships since the (primary) school is close by. Parents struggle, they worry. However, in order to continue with secondary studies, that's where they can't because they would have to leave our community to study and this means more expenses. (Parents Focus Group member)

In addition, the area was unsafe. Girls, in particular, were exposed to a high risk of sexual violence since they had to walk long distances through deserted areas to reach school. These conditions, in addition to the poverty in which families lived, prevented the population from continuing their studies. As described by a community leader:

> Boys and girls do not continue studying because there is no money. There is one school here, but it [only] offers basic secondary education [grades 7-9]. To enrol, you need [to buy] a uniform and this is very hard because there is no money. And to get a career, they [need to] go to Quiché; they [would] have to travel every day, so they don't. They'd rather go to Guatemala to work at a convenience store. Here, in this community … there is no one who has started high school. (Local leader)

Participants consistently reiterated that the right to education was not being fulfilled in the same way for everyone in Guatemala. In this rural community, there was a huge gap between their harsh living conditions and the promises of equal opportunities for education made by the State. The local children had different opportunities and barriers to education than those living in urban areas or even in other rural areas that were less isolated geographically. This desolate perspective seems to be a reality that isolated rural communities have in common.

By the participants' accounts, this marginalization from educational opportunities had lifelong consequences for community residents. Poor living conditions and the lack of opportunities to complete their education forced men to work in the fields and women to do house work. Most teenagers and young adults chose to move to Guatemala City to work in the informal economic sector. Women commonly worked at tortilla shops or as maids, while men worked in convenience stores in dangerous areas of the capital city. These low-paid jobs required long work hours and thus limited the workers' ability to enrol in education programmes offered in the capital city. This situation was described by both students and parents, as shown in the examples below.

Researcher: Do you have siblings who graduated from sixth grade?
Student: Yes, I do.
Researcher: What are they doing now?
Student: They left for Guatemala.
Researcher: What are they going to do in Guatemala?
Student: Work.
Researcher: What kind of work do they do?
Student: They work in a tortilla shop; they work in the store.
Researcher: And if they finish primary school, what do they do next?
Student: They stay at home or go to work at a tortilla shop or some store in Guatemala, Escuintla and other departments.

(3rd grade student)

Some youngsters leave after completing primary education and others after only a few years of schooling, as described by the Municipal Educational Authority official:

> The work for the majority of the people here is in the commercial sector, working in stores. The girls, the ladies, can work in tortilla shops or work on domestic services at homes. (Municipal Educational Authority official)

Nevertheless, migration to the capital city or other regions of the country had not stopped the cycle of poverty. Sadly, participants reported that after working for years in the city, most people returned with no money or skills to work in their community. In addition, moving to the city without proper schooling perpetuated their poverty because the jobs the migrants found in the city were only temporary. Participants explained they wanted opportunities to obtain an education in their communities as this would ensure better opportunities for them as well as for their community. This was reflected in parents' comments:

> It is very hard here. There is no place to earn money. If you stay at home, you can't help. There is no place to earn money, unlike Guatemala [City]. Most youngsters are in Guatemala [City]; they don't stay home. I see no youngsters. There is money there, but it is hard and it is dangerous. Unfortunately, at our community there is no place to earn money. (Focus group of parents)

In conclusion, poverty, adverse geographic conditions, limited educational offerings, and scarce opportunities for development were community factors that made it impossible for this community's residents to fulfil their right to education. However, participants valued the presence of the multi-grade school in their community as this was the only opportunity for children to access a formal education. This school also benefited children from another community which did not have a public school. The decision to provide services to this neighbouring community was an example of enhancing educational access for children, even though this

meant that the teacher had to teach additional children who lived six kilometres away from the school. These efforts at the local level exemplify what can be achieved to promote education with the participation of local stakeholders.

2.3 A Paradox of Inclusive Education: Social Mobility or Assimilation?

The case study of the multi-grade school made visible a contradiction of inclusive education: A promise to advance a person's life could end up reifying inequalities. The evidence showed uncertainty with respect to the concept of inclusive education at this school. For parents and leaders, inclusive education meant that children should have opportunities to continue studying after primary school, or to graduate and start a career and have better opportunities in life. This was communicated by a mother:

> Well, her father wants her to finish 9th grade and become a teacher or a doctor. That is what the father wants for her daughter. He does not want to send her to work at a tortilla shop when she turns 15 or 16. (Mothers focus group member)

Parents also expressed their hope that education would be relevant for their children. One father expected that school would teach his children skills for life, that is, how to read and write and be prepared for the workforce:

> I think that if our children don't study and graduate, they won't find a job, and what will they do? Even worse if they can no longer work in the fields, what will happen to them? They wouldn't be able to eat. They have to be prepared. If they can't get a job related to their studies, they can always look somewhere else. In fact, education is important. (Fathers focus group member)

A particular issue generated tensions among parents and teachers and made visible the deep historical entanglements of ethnic and linguistic identities, social mobility, and education. On the one hand, parents wanted their children to learn Spanish, the dominant language in this nation, instead of communicating and learning in their indigenous language at school. Many parents wanted their children to learn to speak, read and write fluently in Spanish from the beginning of the school. They believed that this would benefit their children socially and economically. As one father put it:

> Our children are studying at school and I want the teachers to communicate with them and teach them Spanish. The teachers communicate with our children in K'iche', and I speak K'iche' with them. Children speak Spanish in other places. It is important for the children to learn Spanish so that they can fend for themselves and are able to communicate with other Spanish-speaking people. I worry that my child won't be able to speak Spanish. (Fathers focus group member)

On the other hand, these expectations put a lot of pressure on teachers. Educators understood the parents' concerns but they also knew that the Ministry of Education encouraged bilingual education because of its beneficial effects on the learning process. The teachers were not bilingual themselves, and they knew that it was also hard for their students to communicate in Spanish. One father confirmed this in the following quote:

> For me it is a matter of concern that they [his children] can't speak Spanish. Sometimes Spanish speakers come and my children are scared because they can't understand Spanish. I reprimand them and tell them: Look, if you are in school why you are not learning Spanish? Because they can't speak Spanish. As a father, I feel it is a shame that the teacher doesn't teach our children to speak in Spanish. (Fathers focus group member)

Ironically, teachers used Spanish in most of the learning activities, so it was hard for students to follow. This was mentioned, inter alia, by the school principal in an interview:

> Well, I would say no, they don't participate much because one of the things I have seen is that they do understand, but they can't express themselves … .We have told the children that they need to try to speak, to ask to speak and explain. We correct with 'How do you say that?', 'How do you do that?' But it is hard for them because of the language. And they want to participate and speak, but they ask themselves, 'What happens if I make a mistake?' They are afraid that someone might make fun of them. (School Principal)

This issue seemed to put a lot of pressure on the students too, making them feel frustrated because it could be seen as a lack of ability to learn in either language and fully master the reading, writing, and speaking skills demanded in both languages. As one of the students stated,

> I don't really understand what the teacher says … because he speaks in Spanish and our language is K'iche'. (Students focus group member)

It was evident that teachers faced an enormous challenge due to the demanding conditions of their school context and the weak support from the National Education System. It was also evident that for most of the students, communication at school was not gratifying. Another interesting finding was the hegemony of Spanish as the vehicle for social inclusion. It seems that the K'iche people cannot overcome their marginalized life conditions unless they learn Spanish. If they and their children cannot acquire the dominant language, full participation and social mobility seems to remain an unreachable promise. But even if they were able to learn the dominant language, would inclusive education be their ticket to assimilation?

2.4 The Tyranny of the Universal Learner: Persisting Standard Pedagogical Practices in Diverse Classrooms

The third perspective on inclusive education was the pedagogical practices that teachers used in the classroom. Educators used the same teaching methods for all students despite the considerable diversity in the classroom. All students were indigenous children with the same native language: K'iche'. However, they clearly differed in terms other personal features, such as age (e.g., over-age students), family background (literate or illiterate parents), grade and performance levels, or cultural attitudes resulting in gender differences (prioritized educational access for boys).

Teachers stated that they did not get enough support from the Ministry of Education to promote learning among different groups of students with special needs. Their main concern seemed to be related to the challenge of having three different grades in the same classroom and being required to promote differentiated learning activities with very limited learning resources. Older and younger students worked in the same classroom, and all required the teacher's attention. However, teachers did not implement learning activities in ways that promoted access to the curriculum, accommodated tasks and activities to increase participation, or made context relevant to the needs of students. Teachers' foremost consideration was the grade level of the students. For example, students from the 5th and 6th grades mentioned that it was difficult for them to understand and complete written evaluations in Spanish. We did not find evidence that the enacted curriculum was aligned with the intended grade level curriculum prescribed by the Ministry. Parents also commented that when their children finished primary school and moved to a high school in another town, they confirmed that they had a lower level of preparation than the students in their new class. It seemed that integration was achieved at this school because students from different grades helped each other, but this was far from inclusive education because of the homogenization of classroom practices.

> Having several groups of students of different grades is complicated ... What I did was to unify grades 4, 5 and 6 ... I couldn't have one group here and another little group there, when I would leave them. [After] I explained a bit, I would have them work and everything, [then] I would go to the other group, and the other group had finished the assignment and they were fooling around. It is a bit hard. (Teacher)

We did not observe any children with special educational needs with or without disabilities at this school. However, one teacher mentioned that in previous years, there had been one student; however, he was unable to achieve the learning level required by the school and left after a few years. The school did not deny this child access, but failed in its effort to include and help him to learn according to his educational needs.

3 Discussion

School stakeholders emphasized the barriers and challenges to implementing inclusive education in their education system. Thus, it seems that they were more comfortable discussing the conditions of inequality that prevail in the country than the concept of inclusion as a viable means of changing the status quo. We learned that inclusive education had been realized in Guatemala, but mainly as a commitment to people with special educational needs with or without disabilities. When we invited participants to consider inclusive education from a broader perspective that included children who had not enrolled in school, dropped out or failed school, we inadvertently shifted the premises of this construct to unfamiliar territory, away from the traditional views of inclusive education in Guatemala. We discuss three themes that cut across the two case studies reported in this chapter.

1. Compelling reminders from developing nations: The systemic nature of inclusive education;
2. Textures and shades of inclusive education in developing countries;
3. Meaningful participation in unequal societies: The last frontier for inclusive education policy and practice.

3.1 Compelling Reminders from Developing Nations: The Systemic Nature of Inclusive Education

The discussions about inclusive education in a stratified society revealed a fundamental paradox. Our interview and focus group participants expected education to be a driver of change and social mobility. This was evident among the participants when they said, for example, that despite their life conditions, they hoped that their children would graduate from high school or college. However, the government's inclusive education policies and measures were not always well received or fulfilled. Moreover, inclusive education goals were not consistently feasible given the contextual realities facing the study participants. For example, teachers who only spoke Spanish taught indigenous students who only spoke their native language at an officially bilingual school, while parents critiqued schools for not teaching Spanish to their children. The fact is that the national education system had substantial difficulties finding enough bilingual teachers for its bilingual schools.

In both case study school settings, the implementation of inclusive education had unintended consequences that mirrored patterns in the larger society. These difficulties were varied and influences were linked to multiple factors. One such factor was the organization of programmes and services that targeted certain student characteristics and needs (e.g., social class, special needs, or language) at the expense of other dimensions or combinations (e.g., second language *and* special needs). For example, the State offered bilingual education services for monolin-

gual indigenous children, but language was the only criterion considered to promote their access to school; this typology ignored the fact that many of these students also needed to work to contribute to the family income. The system also failed when indigenous students migrated to communities that only had Spanish monolingual schools and no fellow students who spoke their mother tongue. In another case that illustrates the consequences of this traditional service delivery approach, special educational aid was provided only to children officially recognized as having special educational needs, excluding other students in the same school who were also in need of support.

Ironically, the Guatemalan education system managed its resources similar to many developed nations. However, in developing countries, vulnerable groups often represent the majority of the student population. Moreover, the available resources to educate them with equity and quality are very limited. This state of affairs raises critical questions such as:

- How can a developing nation with limited financial resources get its educational system to provide quality services for innumerable and interspersed numbers of vulnerable groups?
- Are schools in such contexts already integrating students by de facto, given the nature of the populations being served?
- How can these educational systems properly address the multidimensional needs of these populations?

Developed nations also strive to promote education without exclusion, mainly with specific groups such as ethnic minorities and immigrants in mind. Interestingly, researchers have found that the efforts of developed nations to promote the inclusion of those groups also have unintentional effects and, paradoxically, their education systems have also contributed to increasing social inequalities (Luciak & Biewer, 2015). The causes are different but the results are similar. As Kozleski, Artiles and Waitoller (2015) pointed out, "many developing nations are still struggling to achieve universal school access and completion, whereas developed nations are concerned with equity in participation and outcomes across diverse groups" (p. 5).

This fact might suggest that inclusive education in developing nations should consider the educational needs of students as factors intersecting with family and socio-cultural variables. In addition, inclusive education in developing nations might not obtain the expected results if it is implemented in isolation from other sectors, such as social welfare, health services, income disparities, and labour policy.

3.2 Textures and Shades of Inclusive Education in Developing Countries

The second theme that emerged was the need to understand how inclusive education has achieved positive outcomes despite the complicated challenges described above. It is important to recognize that, even under the conditions in which inclusive education was implemented in Guatemala, we found many good examples of success and improvement of access, permanence, acceptance and participation. How was this achieved, and how were the adverse conditions overcome? Two main research findings helped us address these questions.

First, as Mutua and Swadener (2015) found in other developing nations, the coordinated participation of all members of society is needed to achieve inclusive education. Likewise, our data showed that the Guatemalan education system has benefitted from an unrecognized number of stakeholders inside and outside the education system who confronted barriers and opened doors of opportunity for inclusive education. Borrowing from the terminology of Stanton-Salazar (2010), we call them 'institutional agents', i.e., individuals who have insider knowledge about the institutions in which they work and use this knowledge to support and benefit others. They know how to act effectively in their institutional contexts and enable vulnerable individuals to learn the institutional codes and be successful. We found institutional agents working to improve inclusive education in and outside each of the three levels of the Guatemalan education system.

The urban inclusive school is a good example. At the meso level, there was a key actor—the Departmental Supervisor—who linked the school with other available resources, such as the psychological services offered by the municipality. At the micro level, there were many institutional agents throughout the educational community. The headmaster of the school was clearly the main driver of inclusion. She was able to transform a regular school into an inclusive school in a slum setting. She promoted positive attitudes among the teachers and found available resources for their students in a poor community. Many teachers also served as institutional agents because they were willing to work with children with special needs in their classrooms and create their own tools to help them to learn.

As previous research has shown, inclusive education in poor communities in developing countries has been feasible because of the active participation of community members (Mariga et al., 2014; Mutua & Swadener, 2015). Based on our findings, this participation helped the children in the study access and stay in school, but more efforts are needed to improve their acceptance and participation. Inclusive schools might need to develop a culture of acceptance and respect of differences between people, and this will need to go beyond tolerance and more towards the acceptance of human differences as a positive experience. Moreover, learning participation demands more training of teachers as well as the availability of learning strategies and resources in the classroom.

The second explanation inferred from the evidence is what has been called *spontaneous solutions.* In the two cases presented in this chapter, these solutions did not come from experts, but from people committed to a goal. This proves once more that any person, no matter what their life conditions are, knows how to find his own solutions, as Easterly (2014) pointed out.

Despite the fact that the Guatemalan context has a history of colonization, inequity, repression and centralized public administration, we observed institutional agents who acted in local contexts. Our research at the two schools showed many proactive initiatives by institutional agents to promote inclusive education at the school level. For example, the multi-grade rural school addressed the lack of educational services in a neighbouring community by opening its school to those children. This was a spontaneous solution offered at the micro level to solve an urgent need. We noticed that spontaneous solutions required at least three elements to succeed:

1. Negotiations between local stakeholders,
2. Flexibility in the application of official regulations, with the support and intermediation of one or more actors at different levels of the system and
3. Political support from the local authorities who decided to support education as a local priority, not necessarily by mandate or as part of their duties—an example was the local government hiring psychologists or providing educational services for adolescents and adults who had not attended school.

Spontaneous solutions are different from other concepts like self-efficacy, resilience or agency, which have been previously analysed as ways to face exclusionary and oppressive challenges from social institutions, but these concepts still centre their analytical focus on the individual (Singal & Muthukrishna, 2014). In contrast, spontaneous solutions seemed to be a combination of the personal and collective sense of ability to solve an issue that was important for all, and also the knowledge of how to get a positive result from the actions carried out. Thus, spontaneous solutions seemed to be a collective response to exclusion and adversity. However, more research is needed on this idea.

Spontaneous solutions can be seen as positive initiatives, but they are not always free from negative effects. In our research, they were undertaken by different stakeholders at the regional or local levels. However, we found some evidence of the absence of coordination between the three levels of the education system, even though all of them were working towards similar inclusion goals (e.g., the way in which bilingual education was implemented in the classroom setting or how school buildings were built by municipalities without following technical recommendations for accessibility). Moreover, we think that if spontaneous solutions only address immediate or urgent needs, they will not necessarily bring about sus-

tainable changes that tackle complex barriers to inclusive education over the long term. However, they made things happen when needed.

In summary, we found that institutional agents strongly supported inclusive education. Moreover, they showed a positive attitude and acted proactively to defeat barriers and find solutions and resources in their underprivileged educational contexts. Thus, it could be said that in developing countries such as Guatemala, institutional agents are key players because they perform as many roles as needed when the goal is to promote education. One role played by institutional agents in the present study schools was to mobilize resources and people to pursue spontaneous solutions that made inclusive education feasible.

3.3 Meaningful Participation in Unequal Societies: The Last Frontier for Inclusive Education Policy and Practice

The third theme was related to the participants' understanding of diversity and participation in learning tasks. Stakeholders at the three levels of the system frequently asked how they were supposed to properly handle the challenges presented by diverse students with different educational needs.

Our observations and opinions expressed by different stakeholders during the research process indicated that, at the inclusive slum school, the same teaching methods were used for the whole class of students, and curriculum adaptations were made only for those students with a diagnosis of special educational needs. The challenge of not knowing how to teach students with special needs, such as learners suffering from family violence, deafness, autism and/or Down syndrome, was a recurrent topic of discussion. At the multi-grade rural school, activities were assigned to work groups by grade, but it was difficult for teachers to simultaneously respond to multiple challenges under unfavourable conditions and promote significant learning among all students.

The management of classroom routines, academic delivery models, and learning methodologies for groups of students with diverse attributes seemed to be the main challenge at both schools. Thus, at the classroom level, the biggest challenge for teachers was figuring out how to achieve inclusive education, but this also represented a great opportunity in the way in which learning activities could be implemented at the school and in the classroom. The teachers needed to find creative answers that allow their students to learn in the existing conditions, while avoiding homogenizing teaching methodologies and promoting constructive learning experiences.

Another challenge to achieving acceptance and participation was related to the existence of multiple micro-contexts of society within the same region, a reality of life of the families and students in our study. For instance, we found people living in extreme poverty and people who had their own golf club in their neighbourhood in the same school community. While some children had no drinking water or electricity at their homes, others had privileged life conditions. This was seen at

both case study schools, but more dramatic differences were observed at the slum school. As a result, the students did not have equal opportunities to participate in the daily activities of the classroom. For example, there were well-off children as well as students whose parents could not give them money for special celebrations at school or for notebooks or materials such as pencils and crayons. We think that if these conditions for participation correlated with individual special needs, the task of achieving inclusion at schools gets further complicated.

A distinguishing feature between many students at the two schools was the type of double role they had to play, largely shaped by the prevailing socioeconomic inequalities in this nation. At the inclusive urban slum school, many students had to work in order to attend school. At the multi-grade rural school, boys had to perform community duties (e.g., build roads) that interrupted their school attendance, while girls at the inclusive slum school had to take care of siblings or perform other tasks that interfered with their regular school attendance. These responsibilities created different paths of learning than contrasted with school learning. As Rogoff (2003) explained, through observation and intensive participation in family and community life, children and youth learn without formal instruction and in a collaborative manner. This fact might explain why some parents questioned the relevance of school in preparing their children for the future. However, our research showed that children who worked developed life competencies needed for survival in their contexts, but did not necessarily develop the competencies that could advance their social mobility. As Rogoff (2003) explained, the actions of people depend on their circumstances. Those child labour practices have cultural meanings that reflect historical inequalities that define roles traditionally carried out by members in certain communities. However, from an inclusive education perspective, those duties could also clash with formal education and create tensions between the demands of the community and the requirements of school. As we explained, the socioeconomic conditions of the study communities were largely produced and reproduced by the societal forces that make Guatemala one of the most inequitable nations on the American continent. The evidence from this study suggests that creating the conditions needed to forge an inclusive education system transcends the scope of educational policies and requires inter-sector efforts (Srivastava, Boer, & Pijl, 2013).

In conclusion, strategies for the implementation of inclusive education should be designed to take the conditions of the surrounding community environment, the conditions surrounding learning processes, and the significance of school learning opportunities into account. We need to ensure that education will give students the freedom to become what they want to be, not what they must settle for or are required to be.

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4 Theoretical Annotations of the Research Results from Guatemala and Malawi

While the previous chapters cover various aspects of the empirical results from our studies in Guatemala and Malawi, important country-specific aspects of the results will be highlighted and reflected jointly before different theoretical frameworks here. Most importantly, we will discuss different aspects of the research results that are a continual subject of discussion on educational systems in various contexts, especially in so-called developed countries, and were therefore selected for discussion here. Findings and discourses from developed nations cannot be easily transferred to developing countries (Artiles & Dyson, 2005; Grech, 2011; Miles & Singal, 2010). This is an immutable fact. Therefore, instead of attempting to contribute to the discourse about inclusive education in developing countries in this manner, we will utilize different theoretical frameworks to examine the evidence for the specification of inclusive education in developing countries.

We start by describing the tensions related to the implementation and recontextualization of inclusive education at different levels of the education system as well as the related negative and positive pressures identified in our research, and conclude by deliberating the theoretical considerations of these findings for the implementation of inclusive education in developing countries.

The realization of inclusive education is a highly complex process that inevitably leads to tensions. While it can be stated that such tensions are an unavoidable part of all educational systems, close attention and high sensitivity is needed in order to understand the dynamics of implementation processes. Accordingly, we will start by describing two conflicts that emerged in both study countries and will illustrate their complex implications for the realization of inclusive education.

Fend's theoretical concept of recontextualization (Fend, 2008), which is rooted in the understanding of educational systems as multi-level systems while focusing on the relationships and interdependencies between and within the different system levels, serves as the backdrop of this discussion. In our opinion, one key aspect of recontextualization is the handling of pressure, particularly for practitioners. This is encompassed in Fullan's concept of negative and positive pressure (Fullan, 2010). Fullan argues that changes in the educational system (e.g., new requirements for inclusive education) often create negative pressure, especially for actors at the micro level. Here, we focus on negative pressure under extremely challenging conditions such as those in developing countries.

1 Tensions in the Implementation of Inclusive Education

Tensions have been widely discussed as a characteristic of pedagogical practice (Helsper, 1996). It has been argued that such tensions are an inevitable part of pedagogical practice and cannot be simply dissolved in a one-sided manner. Helsper (2002, p. 68) argues that "under-complex relations" of scientific knowledge and practice are not satisfying. Instead, there is a need for ongoing negotiation between the different perspectives involved. Moreover, such tensions are subject to macro-level processes, which moderate or reinforce them.

Implementation strategies shape tensions related to pedagogical practice at the micro level. This is relevant to the process of realizing inclusive education (Kozleski, Artiles, Fletcher, & Engelbrecht, 2009). It is even argued that tensions are a specific phenomenon, especially with regard to inclusive education (Slee, 2009). At least, in can be stated that new forms of such tensions emerge. In the following sections, we will discuss the findings presented in the previous chapters with regard to tensions which are mediated or even reinforced by decisions-making and negotiation processes at different levels of the education system.

Although several types of tensions can occur in the process of realizing the goal of inclusive education, the following sections will focus on a tension in particular which have been identified in our research:

In both Guatemala and Malawi, our study revealed evidence of *tension between the emphases on educational access versus educational quality.* This tension must be considered as a relevant issue in developing countries because the prevalent idea is that providing educational access is a challenge, especially in developing countries. According to this understanding, educational access is a less dominant issue in developed countries, whereas it has been and still is a foremost issue in developing nations. We would like to discuss and challenge the underlying linear perspective which can be identified here.

Before doing so, we will explain our understanding of the relevant concepts on which our work was based. The concept of inclusive education referred to in our study differentiates three dimensions of inclusion: Access, acceptance and participation[1] (Artiles, Kozleski, Dorn, & Christensen, 2006, see also Introduction). Our research focused on the tensions associated with educational access and quality and thereby referred to relationships between the dimensions of acceptance and participation and the concept of educational quality. Educational quality is considered to be a crucial factor in the realization of inclusive education (Acedo, Ferrer, & Pàmes 2009; Clark, Dyson, Millward, & Robson, 1999; Rouse &

1 The original concept which we draw on here also comprises a fourth dimension, namely, learning achievement (Artiles, Kozleski, Dorn, & Christensen, 2006). Due to limited resources and time, this research project focused on only the first three dimensions (see Introduction).

Florian, 1996). This is so because the concept of inclusive education is not limited to integrating all students in regular school system (access), but also "extends well beyond school coverage for all children and adolescents within a particular area, as it also involves a transformation in learning environments" (Acedo et al., 2009, p. 230).

Although the term 'educational quality' is widely used, the concept of educational quality is hard to define. Definitions generally refer to aspects of input, output or processes of educational quality. Moreover, educational quality is understood in absolute terms or as an ideal which never can be reached fully (Adams, 1993; Cheng, 1997). Therefore, we focus on the concept of educational quality as a process:

> Quality as a process suggests that not only inputs or results but also the nature of the intra-institutional interaction of students, teachers and other educators, or 'quality of life' of the program, school or system, is valued. (Adams, 1993, p. 8)

According to this understanding, quality is a concept that is relative to its context as well as to the persons involved (Harvey & Green, 1993).

Our results show that, while there is a strong focus on access in the study countries, the dimensions of acceptance and participation are neglected. Although there is evidence that other dimensions are considered as well, they turned out to be weaker than access. Accordingly, factors like insufficient personnel and material resources lead to unfavourable situations such as overcrowded classrooms within schools. Classrooms are inadequately equipped to respond to students with diverse learning needs, including diagnosed and undiagnosed special needs. This is a particular challenge for teachers, who play a key role in supporting acceptance and participation in the classroom. This situation is reinforced by inadequate teacher training, low salaries, and low support. Teachers in Guatemala and Malawi lack adequate strategies to meet the heterogeneity of students' needs and call for continuous professional learning opportunities for teachers. Less teacher training and teacher support in practice means that teachers themselves are limited in their ability to provide of supportive structures for students. Teachers overwhelmed by such inadequacies in their pedagogical work are less able to adapt to students' individual needs.

This not only results in low educational quality, but also challenges access in terms of regular attendance and successful completion of primary school. Our results indicate that the most vulnerable children are affected the most. In both countries, we found that children face different challenges with regard to formal education. Many children in Guatemala and Malawi lack the financial means needed for school attendance, i.e., for school-uniforms or school materials. Others lack resources for the basic necessities of life, such as clothing and food. Additionally, the parents and guardians of many children do not encourage or even discourage their

attendance in school. In both countries, this is related to the role of formal education and its relationship to the tense living situations of most families as well as future perspectives. These findings indicate that vulnerable children are the ones most in need of support from their teachers and, hence, are the ones most likely to drop out of school.

The strong emphasis on access which challenges regular attendance is also confirmed in statistical data: There has been a huge increase in access to formal education in both Guatemala and Malawi over the last two decades. Guatemalan statistics show that in 2012, 95 % of children in the official age group attended first grade, according to the primary school adjusted net enrolment ratio (United Nations Educational, Scientific and Cultural Organization [UNESCO], 2015)[2]. Likewise, the primary school adjusted net enrolment ratio in Malawi was 97 % in 2011 (UNESCO, 2014)[3]. However, the statistical data show that Guatemala and Malawi have low educational quality. This is reflected in the fact that school dropout rates in both countries are very high. In 2011, the primary school completion rate was 71 % in Guatemala and only 49 % in Malawi (UNESCO, 2015)[4]. Accordingly, a low school completion rate is strongly associated with weak educational quality in both countries. Therefore, while enrolment rates are very high in both countries, educational quality remains a problem. The tensions between the dimensions of educational access and educational quality will be discussed in more detail below.

As highlighted in the beginning of this section, educational access is regarded as a challenge especially in developing countries and therefore needs a higher attention in developing than in developed countries. Various reasons for this argument can be identified in the discourse and will be presented and discussed below.

First, it has been discussed that global agendas made access their highest priority in the past, which has recently changed (Agert & Villaseca, 2013). Various global policy documents reflect this change in emphasis over the years. Although quality education is already mentioned as a particular goal in the Education for All Goals disseminated in 1990, one can find a recent change in emphasis from educational access to educational quality. Goal 2 of the Millennium Development Goals by United Nations (UN, 2000), for instance, emphasizes universal primary

2 The adjusted enrolment ratio is defined as follows: "Enrolment of the official age group for a given level of education either at that level or the levels above, expressed as a percentage of the population in that age group" (UNESCO, 2015, p. 408).

3 No statistical data in the global monitoring report provided for Malawi by the UNESCO (2015). In 2011 98 % of the official group attended first grade in Guatemala.

4 The survival rate by grade is defined as follows: "Percentage of a cohort of students who are enrolled in the first grade of an education cycle in a given school year and are expected to reach a specified grade regardless of repetition" (UNESCO, 2015, p. 409). This specified grade varies between Guatemala (6th grade) and Malawi (8th grade).

education[5]. In the Sustainable Development Goals (United Nations Development Programme [UNDP], 2015), the goal concerned with education now explicitly refers to 'quality education'. The UN's rationale for this change in emphasis refers to the success achieved in terms of increasing educational access in developing countries. Similarly, Barrett, Chawla-Duggan, Lowe, Nikel, & Ukpo (2006) identified different priorities for education in nations which they define as 'low-income', 'middle-income' countries as well as OECD[6]-countries. With regard to the priorities of 'low-income' countries, the authors identify a special focus on access and livelihoods (ibid., p. 14) with an emphasis on primary school education, whereas the priorities of OECD countries were identified to be "competencies, responsibility and lifelong learning" (ibid.). In Barrett et al. (2006), one can identify an underlying assumption emphasizing different priorities such as access, competencies, and lifelong learning as an expression of different stages of national development.

The second argument discussed is that such emphases are mainly rooted in national education policies and agendas. According to the Education for All Global Monitoring Report (UNESCO, 2015), school fee abolition is motivated by domestic policies and is even a popular election agenda in African countries. Primary education is now mandatory and free in both Malawi and Guatemala. Free primary education was implemented in Malawi in 1994. In Guatemala primary education has always been free (refie, 2015). Malawi was one of the first countries in sub-Saharan Africa to implement free primary education by abolishing school fees (Chimombo, 2009). According to Chimombo (2009), this decision can be regarded as Malawi's response to the Education for All Conference in Jomtien in 1990 and its recognition of the importance of primary education. Inoue and Oketch (2008), who investigated differences in the implementation of free primary education in sub-Saharan African countries by comparing strategies in Malawi and Ghana, found that Malawi prioritized quantity in implementing free primary education, while Ghana focused much more on educational quality.

In a nutshell, our findings in both study countries reveal a strong emphasis on educational access in the inclusive education implementation process. They also indicate that educational access and educational quality are strongly interrelated. Although the significant increase in educational access is an important step towards the successful implementation of inclusive education, it competes with other dimensions of inclusive education—acceptance and participation—which can be regarded as important indicators for educational quality.

5 This policy document reflects a broader understanding of access including the completion of primary education.

6 Organization for Economic Cooperation and Development (OECD)

Additionally, our results show that neglect of the dimensions acceptance and participation challenges educational access, especially for the most vulnerable children. Teachers who are overwhelmed by the situation are unable to provide the pedagogical support required to respond to students individually. Students who have little additional support outside of school are affected most by the situation. Hence, regular attendance and successful completion of primary school, two important indicators of the educational access in our broader understanding of the term, are affected. This means that the poorest boys and girls are the least likely to complete primary education (see also UNESCO, 2014). This process of exclusion is crucial because it is highly contradictive to the concept of inclusive education understood as "active combating of exclusion" (Ainscow, Booth, & Dyson, 2006). The results in both study countries refer to a challenge discussed as being characteristic of developing countries in particular. This emphasis on educational access can be regarded as a result of these states having to deal with limitations, such as those occurring due to the tense economic situation in these countries (see chapter 5). States like Guatemala and Malawi are forced to decide which issues should be considered the most urgent in the process of implementing inclusive education.
There are several possibilities for interpreting this result. For example, in the developmental perspective identified work of Barrett et al. (2006). In this perspective, different priorities (access, competencies or lifelong learning) are understood as an expression of different national developmental stages. However, we do not want to follow this approach here, but instead stress an ecological perspective. Such tensions revealed at the micro level must be regarded as resulting from different levels of decision-making in the respective education system. Hence, the discussed tensions result in peculiarities in the implementation process, which will be illustrated below.

2 Recontextualization of Inclusive Education on Different System Levels

In this section, we use a governance theoretical perspective based on the multi-level model and concept of recontextualization of Fend (2008) to elaborate on the relations and interdependencies of all levels of the education system and draw conclusions regarding measures for the successful implementation of inclusive education. We will also examine the ways in which the recontextualization of inclusive education is taking place in developing countries like Malawi and Guatemala, where there is a severe scarcity of resources.
According to the governance theoretical approach, all governance processes in the educational system, ranging from educational policy-making, educational

management to school development and implementation of the curricula, must be considered. The governance theoretical perspective examines all system levels as a whole and focuses on determining how these levels are inter-linked. This analytical approach requires two kinds of data sources: Those that provide information on the relevant regulations, requirements and legal conditions, and those describing actions in practice. These two kinds of data sources contribute to the development of a 'dual reality' analysis (Fend, 2008, p. 18). In the *refie* research project, this was accomplished by conducting document analyses as well as problem-centred interviews and focus group discussions with educational stakeholders from the national, district, community and school level and participatory observations within schools.

As it can be assumed, policy decisions made on the macro level are not always perceived and implemented in schools in exactly the same way as the policy-makers might have intended them. Requirements are not simply adopted in unchanged form; instead, each level adjusts the prescribed requirements as suits their contextual conditions. According to Fend (2008, p. 26), the concept of recontextualization stresses the roles played by all actors on each level. This concept implies that framework conditions must be adapted to the respective environment.

Actors on each level look 'upstream' as well as 'downstream' to other levels of the system. On the one hand, every level looks 'upstream' for specific requirements, rules and expectations and recontextualizes the framework conditions from the level above to the own level. On the other hand, actors on one level look 'downstream' as actors note that subsequent levels anticipate the own impact. Therefore, the consequences of actions on their own level for the following level(s) must be considered. The concept of recontextualization highlights the fact that every level develops specific perspectives of action depending on its particular environmental conditions, including specific competences, intervention instruments, responsibilities and jurisdictions.

The implementation of inclusive education takes place on the macro, meso and micro level. Applying Fend's concept of recontextualization (Fend, 2008, p. 27) to the implementation of inclusive education, we can conclude that:

1. The discussion of the concept of inclusive education is in present consciousness at every level. Official requirements derived from international papers are present on the national, regional and local level.
2. The framework specifications, which are relatively unspecific regarding inclusion, are adapted to the specific conditions of action on each level.
3. Their adaptation is influenced by institutional requirements (e.g., selection processes, ratings in schools), reflexive processes of self and external perception, task fulfilment and situational constellations.
4. This leads to specific methods, competencies and responsibilities on each level.

5. Pressure from lower levels can arise if institutional requirements complicate their own task accomplishment or lead to problematic results.

We considered the following levels to be relevant to this analysis: Supra-national level (level of international and global agreements, conventions and policies), macro level (national level in Malawi and Guatemala), meso level (districts and departments) and micro level (each school and its surrounding community).

Both Guatemala and Malawi have signed United Nations Conventions such as the UN Convention on the Rights of the Child and the UN Convention on the Rights of Persons with Disabilities. The Millennium Development Goals, which include the goal of achieving universal primary education, were adopted by both countries as well. In both countries, perceptions of the concept of inclusive education often varied significantly between participants at the macro level. Some perceived inclusive education as a broad concept aiming at reducing barriers to education for all children, while others use it was a narrow concept that focuses mainly on children with disabilities, corresponding to a special needs approach to education.

This lack of a mutual understanding of the concept of inclusive education is also present in educational policy documents in Guatemala and Malawi. The term 'inclusive education' can be found in relevant policy papers in both countries. Guatemala has an explicit inclusive education strategy addressing the 'Population with Special Educational Needs with or without Disabilities' (Ministerio de Educación, 2008). Malawi aims to develop an inclusive education strategy within the next years (Government of Malawi, 2014). Although both countries use the term 'inclusive education' in their discourses, they assimilate and recontextualize the concept of inclusion into the existing special needs education structures.

National governmental and non-governmental organizations (NGOs) in both countries show a strong tendency to categorize by specific target groups. Professionals and organizations often focus on a specific group that is excluded or at risk of being excluded (e.g., girls/women, indigenous groups, people with disabilities, poor persons). However, such a specific target group orientation can lead to isolation or even competitiveness between organizations—two effects observed in both countries. For instance, we found that NGOs focusing on specific target groups competed for recognition, awareness and funds from their governments or international organizations.

We found that macro-level stakeholders in Guatemala and Malawi have recontextualized the global discourse on inclusive education in mainly terminological contexts. Because they merely borrowed the term 'inclusive education' from the supra-national level and included it in their national education policy documents without a critical analysis of the concept of inclusive education, implementation is not taking place according to their specific country contexts. Furthermore, specific target group orientation is a strongly established practice in both countries.

The fact that inclusive education is a concept that addresses all groups – especially those at risk of being excluded—is hardly recognized by stakeholders in either country.

That shows in their effort to integrate international requirements such as UN conventions into consistent national development plans in order to meet the requirements of donor countries for development cooperation. Likewise, the calls for inclusive education affect consistent structures. This applies, for example, to different measures for extending and protecting the educational participation of specific groups, which—according to national and regional policies—include children and adolescent with disabilities, girls, indigenous ethnic groups, school dropouts, and orphans etc. The concrete adaption of new requirements in the face of previous structures is challenging. Existing demarcations, responsibilities and intervention instruments are questioned. Recently established institutions with a focus on special education needs without any clear inclusive perspective are criticized. This leads to the demand of an 'own way of inclusion' based on existing structures.

At the national level, tensions and ambiguities regarding inclusive education arise from the necessity to comply with international requirements, which affect one's relationship with donor countries. Compliance with international requirements is realized by integrating the international terminology in national papers. A look downstream from the macro level perspective shows that the existing structures cannot simply be adapted to be inclusive. The stakeholders are aware that it is hardly possible to adapt the existing resource allocation structures to very high demands and requirements of inclusive education. This leads to a reserved approach to handling the new requirements in which Inclusive education terminology is adopted in national policy documents without giving explicit instructions for implementation to stakeholders on the subordinate levels.

The meso-level stakeholders in both countries are in a difficult situation. The demands from higher authorities are very ambitious yet unspecific. Inclusive education, meaning the best support for all pupils in a school for all, leads to high requirements for school development. However, the aims communicated from upstream are unspecific and there are no concrete recommendations for action at the regional level. Meso-level stakeholders predominantly deal with administration and distribution issues and have a relatively weak position in the governmental hierarchy. Our study showed that representatives at the meso level are highly aware of the challenges at the micro level (school/community), but are very limited in their ability to respond; moreover, they can only do so in the context of administration and distribution (see chapter 2.2). Although relevant exceptions exist, one can generally observe a low level of innovation, coordination and self-initiative at the meso level. The weak role of the meso level was also reflected in the statements by actors on the meso level. While looking 'downstream', the

stakeholders at the meso level recognize the actual difficulties on the local level. However, they have little or no resources and can only encourage and implement inclusive education to a very limited degree. Caught between divergent yet abstract and demanding aims and restrictions on their ability to act, they are caught in a difficult 'sandwich position'.

On the other hand, the micro-level stakeholders recontextualize inclusive education in their own way, using cues from the supra-national and macro levels for orientation. The target group-specific orientation typically visible on the macro level is also apparent on the micro level during the implementation of specific measures. However, micro-level stakeholders, who have a broader understanding of inclusion, challenge the macro level's narrow focus on specific target groups. The question of whether this broad understanding originates from the international and national agenda or from experiences on the micro level remains open. However, this shows the need to focus on the system as a whole, and not on specific target groups alone.

This analysis highlights what happens when a concept like inclusive education is passed down from higher levels without recontextualization. The implementation of fundamental reforms in developing countries like Guatemala and Malawi is obviously due to the fact that they not only look to the international community for guidance, but also feel pressure from the international level. Therefore, there is a particularly great need for recontextualization in developing countries.

Two interwoven aspects were carved out of this analysis are that the strong focus group orientation observed on all levels of the education system results in isolated approaches to the implementation of inclusive education, but micro-level stakeholders who believe that inclusive education targets all learners and requires changes in the system as a whole occasionally challenge this orientation. Therefore, we conclude that it is necessary to strengthen bottom-up approaches of change and to adapt structures within the educational system instead of supporting specific target groups alone. Awareness of this necessity has become present in the discourse on inclusive education in developing countries. This might have specific consequences, but the fundamental structures of inclusive education do not differ between developed and developing countries.

3 Inclusive Education: From Negative Pressure to Positive Pressure

According to Fullan (2010, p. 119), the implementation of an inclusive education system requires 'tri-level reform' at the level of the school and its community, the district, and the government. Hence, fundamental changes to the whole education system are necessary for successful implementation of inclusive education. That is why the implementation of inclusive education is such an extremely difficult and complex task, especially under the challenging conditions in developing countries. Fullan suggests the use of *motivational* pressure and support policies and actions in such school system development efforts. On investigating which elements are needed for sustainable development, he identified five forms of negative pressure (Fullan, 2010, p. 121):

1. Blind sense of urgency
2. Pressure without means
3. Punitive pressure
4. Groupthink
5. Win-lose competition

A blind sense of urgency leads to unproductive actionism that is driven by anxiety, anger and frustration. Pressure without means is pressure without a theory of action or strategy to achieve defined goals; it shows failures and goals but no way of getting there. Punitive pressure refers to the threat of punishment for failure to achieve defined goals. 'Groupthink' is a term coined by Janis (1982, cited in Fullan, 2010, p. 121) that describes "a mode of thinking that people engage in when they are deeply involved in a cohesive in-group, when the members' striving for unanimity overrides their motivation to realistically appraise alternative courses of action". In win-lose competition, certain groups or individuals win, but at the expense of the system (Fullan, 2010, p. 121).

After analyzing our data based on Fullan's criteria, we found that 'pressure without means' was highly visible in the development of inclusive education in the investigated countries. The goals of inclusive education are very demanding on all levels of the education system. Moreover, the fact that resources in Guatemala and Malawi are extremely limited has a negative impact on capacity-building. A strong 'blind sense of urgency' was also evident on the macro level in both study countries, where the national levels are strongly oriented towards the international level and have a sense of urgency for integrating the international agenda in their national agendas.

The lack of clear communication of specific steps or strategies for the implementation of inclusive education has left stakeholders feeling overwhelmed and frustrated. There are possible losers in this process. For example, institutions which

focused exclusively on children with disabilities are now noticing that their methods do not meet the requirements of inclusive education.
Conversely, Fullan (2010) identified five forms of positive pressure that are central to sustainable system change:

1. Sense of focused urgency
2. Partnerships and peers
3. Transparency of data
4. Nonpunitive accountability
5. Irresistible synergy

A sense of focused urgency is "moral purpose with a focus: A confident but humble sense of real hope that this can be done, ideas for acting on the goals; a wrap-around sense that there is no time to waste; and a can-do attitude that this will be achieved by the whole team through engaged partnership" (Fullan, 2010, p. 122). Partnerships and peers centres around transparent leadership and participation: "The idea is to learn about implementation from peers during implementation. Knowledge flows and a sense of identity grows with wider circles of peers" (ibid.). Transparency of data on results and practice "is about assessment of learning … and the link to precise, high-yield instructional practices that produce such learning for all students" (ibid.). Nonpunitive accountability "plays down 'judgmentalism' in favor of high expectations in your face. Achievement data, effective practices act as (effective) accountability, but accountability per se in not the main point. The value of relentless nonpunitive accountability is a powerful strategy for improvement with external accountability as a natural by product." (ibid., p. 123). Regarding irresistible synergy, Fullan (2010) stated: "The previous four pressure points when pursued in an integrated fashion create relentless synergy. Strategies are focused, aligned, comprehensive, and based on partnership" (ibid., p. 128).
Transferred to the context of the implementation of inclusive education in developing countries, this indicates among other things a need for a clear definition of the concept of inclusive education. This definition should contain clearly delineated criteria for inclusive schools and the quality of inclusive teaching. Moreover, it would be a substantial step to define realistic goals for school development processes that are useful and practical under the given circumstances. Higher and abstract goals can then be concretized if all school system levels are considered. This also implies the need for analysis of existing conditions on the meso and micro level. The central dimensions of access—acceptance, participation and achievement—should be considered in analyses of inclusive and exclusive processes. Finally, the impact of the resulting interventions must be observed and then adjusted or changed as needed.
Positive pressure can be an effective tool in the implementation of inclusive education in developing countries. If all participating stakeholders, especially teachers,

parents and pupils, have positive, concrete and achievable goals, they can perform even under the conditions of limited resources.

4 Conclusions

The process of realization of inclusive education is a complex enterprise which creates tensions of various kinds. Drawing on Slee (2009), it can even be stated that tensions are inevitable, especially in the process of implementing inclusive education. Our results confirm this. The tension between education access and educational quality observed in our research refers to implementation issues. Accordingly, it is necessary to draw attention to the nature of the implementation processes that we elaborated in this chapter: In retrospect, it becomes evident that the affected stakeholders have no shared concept for handling the existing differences and the discrimination and inequities that result from them. Recontextualization of the concept of inclusive education is a necessary, multi-level process, which should lead to the development of concrete, realistic and achievable goals for all actors on each level of the education system. This serves to produce positive pressure that is motivational. Negotiation of the concept of inclusive education and its implementation is a relevant process that requires intensive communication. Feasible goals serve to prevent negative pressure.

The challenges associated with the implementation of inclusive education in 'developed' and 'developing countries' are comparable. Stakeholder perceptions of the concept of inclusive education vary from broad to narrow understandings of the term. This is evident in discourses in both developed and developing countries. The tensions observed in the implementation of inclusive education have similar structures but different manifestations. However, many factors and conditions challenging developing countries are very context-specific: Strong structures of inequality, public services crippled by a lack of human, financial and material resources, and post-colonial formal education systems that often do not meet the expectations of modern society.

Comparisons of inclusive education situations in developing and developed countries have revealed specific conditions, comparable challenges and context-sensitive approaches to implementation. However, despite all the similarities, it is also evident that intervention approaches and strategies cannot be simply transferred from developed countries to developing nations without recontextualization (Artiles & Dyson, 2005; Miles & Singal, 2010; Mitchell, 2005). Therefore, instead of transferring 'Northern' concepts to developing nations in a 'top-down' manner, successful strategies for the implementation of inclusive education in de-

veloping countries must enable autonomous recontextualization processes, which are crucial to the development of suitable solutions.

When attempting to implement inclusive education in any context, especially in developing countries, we should stop considering inclusive education as an ideal status because ideals are usually connected to unspecific and unrealistic goals. Instead, inclusive education should be conceived as a concept designed to maximize educational access, acceptance and participation and minimize discrimination in order to promote the psychological, social and personal development and achievement of all children. Such an approach can serve as a scaffold for critical reflection on approaches for the successful implementation of inclusive education.

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5 Reflections on the Future of Inclusive Education

The preceding chapters focused on research on the contextualization of the global movement of inclusive education in Guatemala and Malawi and on the research questions of *how* the concept of inclusive education is constructed at different levels of the system and *which* success factors and barriers to inclusive education systems exist and can be used to draw conclusions for further development of cooperation measures. To do this, we presented detailed results based on two contrasting case studies from both countries addressing the issues of success factors and challenges and discussed these success factors and challenges theoretically. In this chapter, we reflect on the future of inclusive education against the background of the research findings, with specific reference to the themes identified in the preceding chapters. Three future perspectives derived from our findings which we consider to be essential to the implementation of inclusive education in developing nations will be presented in the following sections. Finally, we will discuss the question in the title of our book: *Keeping the promise?*

First, we would like to clarify the meaning of the future perspectives which we will present in the following. We hope that by calling them 'future perspectives', concrete recommendations will not be expected. As has been highlighted previously, discourse on inclusive education in developing countries is critical for several reasons. Research on the development of education and inclusive education tends to reflect concepts and ideas exported to developed countries (see chapter 2.1). Additionally, a general lack of research on inclusive education in developing countries can be identified (see chapter 1). Against this backdrop, the appropriateness of existing recommendations has to be questioned. Our findings confirm that the notion of appropriate recommendations that are valid for every context at all times is not only an illusion, but is not at all desirable. Therefore, the future perspectives presented in the following sections will challenge conventional recommendations by explicitly arguing that realizing inclusive education means being aware of the complexities involved, on the one hand, and of the specific solutions that this requires, on the other. It also means accepting inclusive education as an ongoing reflective process and being aware of underlying tensions and ambiguities.

Future Perspective #1: Using Situated Models of Inclusive Education

Like most developing nations, both countries studied in the *refie* project look back on a history of colonization. Legacies of colonization are characterized, *inter alia*, by the permanence of stratification structures and processes that perpetuate the division of people into privileged and disadvantaged strata. Fundamental precepts of the concept of inclusive education encompass aspects such as appreciating the diversity of all humans and believing in equal rights for everyone. These different views on human individuals and societal values constitute a categorical contradiction. Due to many factors, ideas based on an understanding of the privileged and the disadvantaged still exist in part and in several facets, even in post-colonial societies, and are now challenged by concepts related to inclusive education (Grech, 2011). Implementation of inclusive education in such contexts reveals the overwhelming inequalities present in all nations, particularly in developing countries. As discussed earlier, implementing educational change in what 'countries of the North' regard as 'developing countries' or 'countries of the South' is a diverse and complex issue. Not only do these countries have different socioeconomic and cultural-historical profiles, but also diverse external and internal influences have shaped their trajectories of educational change, including the introduction of inclusive education (Chisholm & Leyendecker, 2008). As pointed out in chapter 1, the term 'developed' or 'developing' country has become shorthand for highlighting the overwhelming and complex set of inequalities and dependencies between countries, specifically with reference to fundamental economic inequalities (Singal & Muthukrishna, 2014).

As stated in chapter 1, the concept of inclusive education is on the global agenda and is mainly being exported from developed countries to developing countries. Both Malawi and Guatemala are confronted with international pressure to respond to global policies on inclusive education that do not acknowledge the developing nature of the economy and the challenges facing the mainstream education systems in both countries. Donor agencies have played an overwhelming and decisive role in shaping policy goals related to inclusive education in both countries, but the actual realities of schools in rural and remote parts of both countries have not been taken into account in these policy developments. As a result, different international, national and local discourses on inclusive education are competing with one another in the implementation of inclusive education at the national and district level in both countries (Chisholm & Leyendecker, 2008). Our focus on inclusive education has made the overwhelming complexity of inequalities and socio-cultural-historical baggage visible, especially at the ground level. Research on international educational discourses and their implementation shows a continued divergence from discourse at the level of local practice (ibid.).

For example, studies on policy and curriculum implementation indicate that it does not follow the usual predictable path of formulation-adoption-implementation-reformulation in either developed or developing countries, but it is recontextualized through multiple processes and mechanisms, and that the available capacities as well as local cultural values, beliefs and teacher competencies shape the outcomes of implementations (ibid.). Our own research on the implementation of inclusive education in both Guatemala and Malawi has confirmed that the way to understand implementation is therefore to start by examining local practices and the unique economic and social structures that significantly constrain educational development and equality within an emerging inclusive education system, such as that in our two study countries with a history of colonialism and its legacies. This has been emphasized by various researchers, e.g., Singal and Muthukrishna (2014).

In our research, we identified several dimensions of inequality resulting in disadvantages with regard to education, namely: Gender, ability, socioeconomic status of the family, place of residence (rural vs. urban), family structure (orphans), ethnicity (indigenous vs. non-indigenous), and language. However, it is not sufficient to exclusively focus on single dimensions of inequality as the intersections between these singular dimensions require further clarification and recognition of the development of mainstream education. This would enable developing countries to find ways to commit to the development of locally relevant inclusive education practices in a global era of increased diversity and diminishing economic resources rather than becoming mired in a single dimension like racial inequality, as is often the case, for example, in the USA (Ferri, 2015).

Despite the overwhelming lack of resources and clarity regarding what is meant by inclusive education and who it should therefore include, powerful enablers within some of the case schools were identified. Respect for local solutions, ethics and values is essential for the development of locally adapted inclusive education approaches, as was stated previously, e.g., by Singal and Muthukrishna (2014). Both Guatemala and Malawi have diverse local grass-root initiatives at the school and community level and a developed sense of ownership at the local administrative level. These initiatives address various needs of different disadvantaged groups. Aggregation, coordination and scaling-up of these initiatives would contribute significantly to the implementation of inclusive education.

Inclusive education is linked to socio-historical structures and conditions in national and regional contexts (Artiles & Dyson, 2005). Therefore, implementation efforts have to be context-sensitive. No global 'one-size-fits-all solution' for the implementation of inclusive education can be developed. On the contrary, local solutions, ethics and values must be taken into account and communicated between all levels (especially from the micro to meso and macro level) if the gap between policy and practice is to be overcome (Engelbrecht Nel, Nel, & Tlale,

2015; Srivastava, de Boer, & Pijl, 2013). However, a critical analysis of inclusive education policies in Malawi and Guatemala (see chapters 2 and 3) indicates that policy tends to be based on broader, ambiguous vision and goal statements with little resource commitment or clear implementation strategies based on the realities, for example, in distant rural schools (Hardy & Woodcock, 2015; Singal & Muthukrishna, 2014).

Future Perspective #2: Considering the Importance of Educational Quality in the Process of Realizing Inclusive Education

The realization of inclusive education is dynamic and highly complex process. Moreover, it is inevitable that such a complex process will lead to tensions at each level. As demonstrated by our findings, these tensions can challenge educational quality within the classroom. Neglecting such tensions can negatively impact supportive structures within the system. For this reason, we emphasize the interrelatedness of educational quality and the process of successfully implementing inclusive education.

The process of implementing inclusive education is strongly related to processes referring to other 'principles' (Acedo, Ferrer, & Pàmes, 2009; Clark, Dyson, Millward, & Robson, 1999; Rouse & Florian, 1996), such as equity and educational quality (Grimes, Savarath, & Outhaithany, 2013). Furthermore, the relationship between the process of implementing inclusive education and educational quality is ubiquitous, as has been explained by investigators such as Heimlich (2013). The emphasis of international policy documents and other related literature has changed from increasing access to further developing the educational quality of inclusive education (Kyriazopoulou & Weber, 2009; see also chapter 4). However, the relationship between inclusion and quality remains indeterminate. According to Lei and Myers (2011, p. 126), "inclusive education provides the international community with a blue print for quality education". They argue that quality is a consequence of inclusive education (Lei & Myers, 2011), whereas Kyriazopoulou and Weber (2009) hold that quality is a precondition for inclusive education. These two contrasting positions underline the complexity of this relationship and reflect the ambiguity of the underlying concepts. Depending on the respective definition, the two concepts can be understood as either equivalent (Grimes, Savarath, & Outhaithany, 2013) or contradictory (Peters & Oliver, 2009). The concept of educational quality can be viewed as either descriptive or normative. Furthermore, it can be understood as referring to input, process and/or output variables, and may refer to different system levels, as explained by Fend (2008), Klieme and Tippelt (2008) and others. Varying definitions of the

relationship of inclusive education and educational quality can be regarded as an inevitable consequence of this.

When we speak of the relationship between inclusive education and education quality, we refer to educational quality in terms of dynamic and relational educational processes occurring in a particular classroom (Adams, 1993; Fend, 2008; Harvey & Green, 1993). In this sense, educational quality is related to our underlying conception of inclusive education: Based on our understanding of inclusive education, we do not focus on educational access alone, but also consider the dimensions of acceptance and participation of students within a given school. With regard to implementation processes, we therefore refer to the situations experienced by a particular student in his or her classroom and at his or her school and focus on the supportive structures existing within his or her school against this backdrop.

Using this as the basis of understanding, we will detail specific tensions that emerged in this study. For example, as a result of the enormous efforts to increase educational access in both Guatemala and Malawi, which were also observed in our study, almost all children in the official age group attend first grade, as stated by the United Nations Educational, Scientific and Cultural Organization (UNESCO, 2015a). However, our study revealed that insufficient personnel and material resources lead to unfavourable situations that challenge the dimensions of acceptance and participation at the schools. This indicates that access in terms of continuous school attendance is strongly related to the dimensions of acceptance and participation within the school. Hence, according to our understanding of educational quality, as elaborated above, educational quality is challenged as well (see chapter 4).

A reduction of educational quality means that supportive structures are weakened while selective structures within a school are reinforced. Selective tendencies are exclusive processes and, as such, are in contradiction to the term *inclusive education*, which involves the "active combating of exclusion" (Ainscow, Booth, & Dyson 2006). Stratification processes in relation to school have been intensively discussed by scholars such as Durkheim (1984), Parsons (1951; 1970) or Bourdieu and Passeron (1971). Though their arguments differ, they agree that schools and education systems as a whole contribute to stratification processes. This means that schools accept that different students have different outcomes and types of status they can achieve within society. Drawing on Parsons (1951), Fend (1980) defines the three main functions of school as qualification, selection/ allocation and integration/ legitimation, and characterizes the way they are related to society. Accordingly, every education system integrates selective tendencies and contributes to stratification processes. Both inclusive education and stratification processes are integral parts of schools and education systems but can be regarded as potentially competitive.

Nevertheless, theoretical perspectives and empirical results from developed countries cannot simply be transferred to developing countries (Buchman & Hannum, 2001). Stratification processes are important in both developing and developed countries. There are similarities—for example, the relationship between family background and educational achievement is evident in both developed and developing countries (ibid.), but also huge differences—e.g., the role and concept of family differs between developing and developed countries as well as between developing countries (ibid.). Our results confirm that the relationship between family background and formal education is a crucial factor. As it has been shown, the economic situation within a country not only shapes the situation of families, but also influences that of their communities and schools. Moreover, the values, aspirations and orientations that predominate in families and their respective communities are also of relevance. Formal education must prove itself relevant with regard to improving the realities within families and improving the future prospects of students (see chapters 2.2; 3.2).

In this respect, it can be stated that selective processes in both study countries refer to the challenge of regular attendance. Our study showed that low educational quality, which corresponds with weak dimensions of acceptance and participation, poses challenges to regular attendance and completion of primary school. This leads to a divide between children inside and outside the school. Our results suggest that the children who are most vulnerable in terms of health, financial resources and family support are those affected most by this situation. This indicates that a strong emphasis on educational access while neglecting educational quality results in challenges to educational access.

The emphasis on educational access refers to deep economic inequalities. Due to resulting financial limitations, states like Guatemala and Malawi cannot afford to consider all dimensions at the same time. Barrett, Chawla-Duggan, Lowe, Nikel and Ukpo (2006) argue that an emphasis of education policy on educational access relates to the overall situation and developmental stage of a country. Consequently, they regard educational access and educational quality as chronological steps in such an approach. Conversely, Inoue and Oketch (2008), who compared different intervention and implementation strategies between countries, challenge the validity of this linear perspective. In this regard, we emphasize the importance of using an ecological approach which captures negotiation processes at all levels as well as between levels in order to understand the consequences of such negotiations for access, acceptance and participation. Although the achievement of inclusion is a great challenge, governance policy-makers must be aware of the contribution of all dimensions. Because these interrelated dimensions react to their surrounding contexts, societal processes as a whole as well as intervention strategies directed towards the education system shape this specific relationship. Education policy mediates, reinforces and/or mitigates the conditions of the over-

all society in this sector in particular. Therefore, an ecological perspective that takes processes on all system levels into consideration must be adopted in order to address these complex realities.

Future Perspective #3: Creating Positive Pressure

Inclusive education means a promise of education for all people despite their individual characteristics, their starting point before entering the education system, or their particular living conditions. In a global world, this promise implies that any country's citizens, although from different backgrounds, can be expected to develop similar competencies for life in order to achieve personal and collective well-being through education. Therefore, the global goals established by international organizations provide a common frame of reference against which educational systems from different countries can be measured and compared.
One example of the international frame for education is reflected in the two commitments stated in the Incheon Declaration "Education 2030: Towards inclusive and equitable quality education and lifelong learning for all" (UNESCO, 2015b), which aims to promote inclusive education:

> 1) "We commit with a sense of urgency to a single, renewed education agenda that is holistic, ambitious and aspirational, leaving no one behind. This new vision is fully captured by the proposed SDG 4 *'Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all'* [emphasis in original] and its corresponding targets."
>
> 2) "Inclusion and equity in and through education is the cornerstone of a transformative education agenda, and we therefore commit to addressing all forms of exclusion and marginalization, disparities and inequalities in access, participation, and learning outcomes. No education target should be considered met unless met by all. We therefore commit to making the necessary changes in education policies and focusing our efforts on the most disadvantaged, especially those with disabilities, to ensure that no one is left behind."

Based on evidence from the *refie* project, which was carried out in two developing countries (Malawi and Guatemala), we identified two complexities in the implementation of inclusive education, which will be described below.
First, as proposed by Fullan (2006) and supported by evidence from the *refie* project, commitments such as those of the Incheon Declaration exert negative pressure on education systems in developing countries. Because negative pressure is pressure that is "ad hoc and extraneous to the system culture" (Fullan, 2010, p. 120). As a consequence, it "doesn't motivate" or even "get capacity building"

(Fullan, 2006, p. 9). According to the previous estimates, the Malawian and the Guatemalan education systems must progress as fast as they can in the next 15 years in order to be able to provide quality education to all their citizens without any type of exclusion. In both countries, enormous effort and flexibility in different areas (e.g., bilingual education, poverty reduction, rural educational services, and non-formal education programmes) will be required to meet these goals and to guarantee inclusive and continued access to education for all people, including girls, working children, and over-age students, among others.

Concerns about how inclusive education can be achieved in states with insufficient financial resources were echoed in comments by *refie* project participants. For example, the lack of financial resources has determined the way in which educational policies have been managed so far in a country like Guatemala, where—according to Asturias de Barrios, Escobar, & Sazo de Méndez (2011, p. 7)—policy decisions are made on a "selective assignment" basis, i.e., by means giving priority to the most urgent educational topics. Therefore, other important are not met by the state, and the exclusion of some groups is as an unavoidable result.

On the other hand, when developing countries sign declarations like those described above, they confirm their commitment and determination to move toward development and to fight with dignity and hope against the possibility of always staying behind developed countries. Evidence from our study revealed that across the three levels of the education systems of both study countries, there are enablers who show great commitment and effort to make changes and generate opportunities to promote education for all.

Therefore, the evidence shows that there is a contradiction between the negative pressure that occurs when developing countries are pushed to fulfil commitments far beyond their capabilities, and the positive pressure that developing countries experience when they demonstrate their own commitment to develop and improve their situation so they can achieve the desired progress.

As Fullan (2006) pointed out, tri-level engagement is needed for systems reform, and such engagement is characterized by 'permeable connectivity' within and across levels. The results of the *refie* project, as evidenced at the macro level, showed that decision-making processes were oriented towards the expectation of achieving projected goals and in consideration of the gaps facing the target population. First, macro-level stakeholders in the study countries were making efforts to ensure that their educational policies, programmes, plans, strategies and standards were aligned to fulfil national and international commitments like the Millennium Development Goals. Next, stakeholders at the meso level played intermediation roles in order to adapt these goals to local needs and cultural norms and to properly communicate these goals to diverse populations and stakeholders. Finally, micro-level stakeholders from the educational community interpreted

these goals based on their own experiences and strived to fulfil them based on the resources available to them.

A common view shared by stakeholders on all three levels was the belief that education leads to collective development. The tension between positive and negative pressure was reflected by stakeholders who expressed the hope that every child should be able to attend and succeed at school despite the economic conditions limiting the affordability of education for all. Parents feel negative pressure when economic constraints make it difficult to impossible for them to give their children an education when they wish to do so. Most of the parents who participated in the *refie* research project believed that making the effort to send their children to school was very important for their future and was something that the children really deserve. Their doubts were mainly related to the ability of the education system to give all children a quality education, especially those with particular needs (e.g., language, special educational needs, age), or to the relevance of what is taught in schools.

This tension between negative and positive pressure was also present among school teachers and headmasters. Teachers, for example, felt negative pressure when they were expected to include children with special educational needs in their classrooms although they did not have the training and tools to do so. However, some of them interpreted this as a challenge that should be addressed in a proactive way, e.g., by encouraging teachers to find learning opportunities for all of their students. Nonetheless, the dynamics of this negative and positive pressure facing the management of the education system causes division or a lack of articulation between the different levels of the educational systems; this also applies to some other state institutions that are responsible for implementing social policies intended to support education.

Evidence from the *refie* project indicated that there was not only a lack of articulation between the current strategies toward inclusion, but also a lack of a shared understanding of what inclusive education meant within and between levels of the educational systems in both countries. Therefore, measures dictated at the macro level were not always fulfilled or only partially implemented at the micro level. Moreover, a lack of intersectoral communication and coordination was leading to misunderstandings and fragmented approaches to inclusive education.

The main explanation for the negative pressure on developing countries resulting from the aforementioned goals is that these nations have limited financial resources to provide quality education for all within the expected time. The challenge for developing countries is to figure out how to best integrate inclusive education policies from their disadvantaged starting points in order to achieve implementation at the same speed as most developed countries. If developing countries do not reach standards equal to those of other countries, the existing gaps caused by underdevelopment will increase. Moreover, it should be remembered that devel-

oped nations benefitted from the fruits of colonialism for centuries and used these resources to attain their current levels of development across sectors. Ironically, most development agendas seem to ignore this fact and expect developing nations to implement these changes in significantly shorter time frames and with far fewer resources.

Leadership and ownership at all levels are important keys for the successful implementation of inclusive education in developing countries. Moreover, implementation strategies must be carefully discussed from the perspective of developing countries in order to reduce negative pressure and increase positive pressure while moving forward towards achieving the goal of inclusive education.

Keeping the Promise?

It has been shown that inclusive education is a highly complex, multifaceted concept and agenda. Stakeholder perceptions range from a narrow to a broad understanding of inclusive education. Therefore, the implementation of inclusive education includes diverse aspects of marginalization, such as ability, language, culture, and gender. The inclusive education discourse takes place at different levels, e.g., global, national, regional and school-specific. Because the process of implementing inclusive education is deeply intertwined and embedded in societal structures, the implementation of inclusive education sometimes creates paradoxes and stands in contradiction to existing historical societal structures. Moreover, inequalities with deep roots in society can act as barriers to inclusive education. This is especially true of economic inequalities that limit investment in the education system.

In this respect, inclusive education is strongly interrelated with educational quality. Educational quality is a holistic concept and dynamic process related to important aspects ranging from the supply of learning materials and learning media, professionalism of teachers, and curriculum development to quality management and quality development. The above-mentioned aspects show that the implementation of inclusive education should not be regarded as a short-term initiative, but as a long-term process. Moreover, the specificity of implementation with regard to developing countries has to be taken into consideration as well as the specific characteristics of the respective country in which inclusive education is to be implemented. Experiences from developed countries cannot simply be transferred to developing countries due to differences in their socio-historical backgrounds, which become evident at all system levels. Implementation approaches based on simply transferring one country's experiences to another bear the risk of generating high levels of 'negative pressure'.

In conclusion, we would like to emphasize two aspects which we regard as essential to the future perspectives of inclusive education: First, the use of an ecological perspective that considers all relevant system levels (macro, meso, micro) and their interrelation is necessary to develop an awareness of the interactions between levels and sensitivity to potential by-products of the implementation process. Developmental processes cannot be conceptualized as simple top-down or linear processes. Recontextualization and negotiation processes on each level have to be considered. Moreover, the use of an ecological perspective is a suitable strategy for recognizing horizontal processes and backlashes on each level. Finally, inclusive education must be implemented in a context-sensitive manner, i.e., by following an approach that is sensitive to the existing cultures, traditions, practices and structures of the specific setting. Again, this calls for the use of an ecological perspective.

According to our understanding of inclusion as a long-term process, inclusive education should be understood as a scaffold for critical reflection. Such a reflective perspective is needed to respond adequately to diverse situational and contextual conditions in a given education system and is thus necessary for achieving the goal of inclusive education. This means that rather than focusing on high yet abstract aspirations and goals, concrete implementation steps, responsibilities and actions must be defined. Accordingly, local tensions must be taken into consideration, especially structures resulting in the systematic discrimination of specific groups and persons. Such processes take place within every single school. Related processes can be characterized by the three-way model of school development, which comprises the domains of organizational development, personnel development and learning and teaching development (Rolff, 2012). These three domains help to define and structure responsibilities and actions by stressing various aspects of implementing inclusive education. Florian and Black-Hawkins (2011) also emphasize the need to differentiate between inclusive education and inclusive pedagogy. Inclusive pedagogy is a normative notion that stresses that inclusive education should be realized by extending what is available and achievable for all. In this respect, inclusive education can be used as a scaffold for critical reflection in a concrete institution. Hence, it is neither an abstract goal nor an instruction manual for implementation. Instead, it should be regarded as a strategy or vehicle for critical reflection on existing structures, practices and cultures. Such reflection processes can then lead to the inductive development of locally and regionally valid goals, responsibilities and actions.

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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.

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

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