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Developing inclusive education systems: pathways and barriers

Abstract ▪ This chapter focuses on a major challenge facing education systems across the world, that of finding ways of including all children and young people in schools. Faced with this challenge, there is evidence of an increased interest internationally in the idea of making schools more inclusive and education systems more equitable. Using examples from the authors' current work, the chapter presents a collaborative research approach that is intended to make direct contributions to thinking and practice in the field. Significantly, the approach makes use of resources that are already available in every school in the world: teachers, students, families, and other stakeholders. In this way the chapter seeks to contribute to ongoing debates about finding ways of ensuring that educational research has an impact on thinking and practice in the field.

Keywords ▪ Inclusion; equity; collaboration; voices; system change

1 Introduction

Over the last 30 years there have been major international efforts to encourage inclusive educational developments. In particular, the United Nation's Education for All (EFA) movement has worked to make quality basic education available to all learners. The importance of this being inclusive was emphasised in the Salamanca Statement, published just over 30 years ago (see: UNESCO, 2024).

The year 2016 was particularly significant in taking this global reform agenda forward. Building on the Incheon Declaration agreed at the World Forum on Education in May 2015, it saw the publication of the Education 2030 Framework for Action. This emphasises inclusion and equity as laying the foundations for quality education.

The introduction of the concept of equity into these international policy debates was significant in that it pointed to the importance of fairness, leading to the need to address all forms of exclusion and marginalisation, disparities and inequalities in access, participation, and learning processes and outcomes. In this way, it is made clear that the international EFA agenda has to be about *all*.

Despite these developments, a Global Monitoring Report points out that an estimated 258 million children, adolescents and youth are still not in school (UN-

ESCO, 2020). Meanwhile, the OECD (2021) reports that the poorest learners, living in the poorest areas, achieve less well than their wealthier peers, with these patterns found across higher and lower income countries. It also found that race, gender and a host of other factors, intersect and deepen these entrenched economic and spatial inequities.

Adding to this, UNICEF reported recently that, globally, nearly two-thirds of 10-year-olds are unable to read and understand simple text¹. Meanwhile, many young people leave school with no worthwhile qualifications, whilst others are placed in special provision away from mainstream education and some choose to drop out since the lessons seem irrelevant (OECD, 2012). What, then, can be done to in response to these global challenges? How education systems can be developed to support schools in becoming inclusive?

In this chapter we describe an approach for promoting inclusion and equity that we have developed through our research. Significantly, the approach makes use of resources that are already available in every school in the world: students, teachers, families, and other stakeholders.

2 Perspectives

The tendency in many countries is still to think of inclusive education as being concerned with students with disabilities and others categorized as having ‘special educational needs’. Furthermore, inclusion is often seen as simply involving the movement of students from special to mainstream contexts, with the implication that they are ‘included’ once they are there.

In contrast, we see inclusion as a never-ending process, rather than a simple change of state, and as dependent on continuous pedagogical and organisational developments within schools. The implication is that every school is inclusive to some extent and that all schools have to continue a never-ending process of finding ways of reaching new students who bring with them new challenges.

The approach is radical in the way that difficulties in education are defined and addressed (Ainscow, 2024). It argues that the aim of inclusive education is to eliminate exclusion that is a consequence of attitudes and responses to diversity in race, social class, ethnicity, religion, gender and ability. As such, it represents a challenge to existing policies. This change is difficult to introduce, however, not least because traditional perspectives and practices associated with the field of special education continue to dominate thinking in the field in many countries, encouraged by what Sally Tomlinson (2012, p. 2) refers to as “an expanded and expensive SEN industry”.

1 For more information see the Unicef press release: <https://www.unicef.org/press-releases/unicef-warns-shockingly-low-levels-learning-only-third-10-year-olds-globally>

Our work is focused on putting a broader view of inclusion into action. It is also concerned with the roles that research and researchers should play within such efforts. In what follows we provide two illustrative examples of how this approach has been used, focusing first of all on the development of inclusive schools and then on the implications for system reform. In each case, the focus is on finding pathways for addressing contextual barriers experienced by students.

3 Developing inclusive schools

The research we report focusses attention on making more effective use of available human resources to promote inclusion in schools. It places teachers and the development of their practices at the centre of these efforts. It follows that teacher professional learning is crucial for promoting inclusion (Messiou & Ainscow, 2015).

There is, however, another set of human resources that are often overlooked when thinking about the development of inclusive schools: that of children and young people themselves. This leads us to ask: what roles can they take to lead to the improvement of teaching and learning?

In our work, inclusion and student voice are seen as being interconnected ideas (Messiou, 2019), with inclusion referring to the identification and removal of contextual barriers to the presence, participation and achievement of all learners. Two interconnected international studies have helped us develop a strategy for implementing this perspective.

The first study involved eight secondary schools in cities in England, Portugal and Spain (Messiou et al., 2016). Building on the findings of this research, the second study involved a two-stage collaborative action research study, carried out with 30 primary schools in five countries (i. e. Austria, Denmark, England, Spain and Portugal). All the schools were invited to take part because they were known to have diverse student populations (Messiou & Ainscow, 2020). Teams of researchers from local universities supported these developments.

The approach that evolved from this programme of research, which we call 'Inclusive Inquiry', involves a series of interconnected processes, as shown in Figure 1. Central to the approach are discussions amongst teachers and their students about how to make lessons more inclusive, ensuring all children's participation and achievement. This involves some students who are seen as hard-to-reach in becoming researchers, who learn how to use research techniques to gather the views of their classmates, as well as by observing lessons (the project materials can be found in various languages at the ReHaRe Website (<https://reachingthehardto reach.eu/>)).

The dialogues that this encourages are focused on learning and teaching. More specifically, differences amongst students and teachers are used to challenge exist-

ing thinking and practices in ways that are intended to encourage experimentation in order to foster more inclusive ways of working. This, in turn, sets out to break down barriers that are limiting the engagement of some learners, not least by challenging taken-for-granted assumptions about the capabilities of particular students.

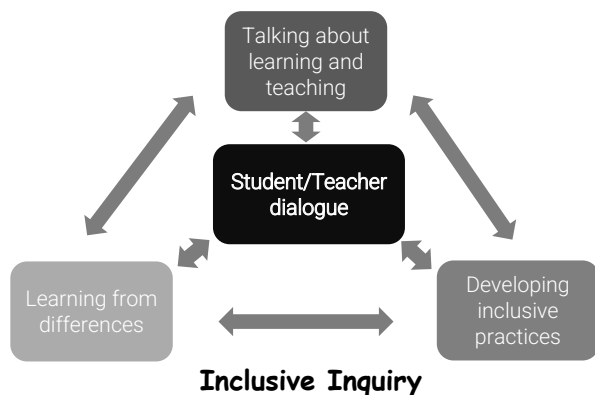


Fig. 1: Interconnected processes of Inclusive Inquiry (own illustration)

In practical terms, Inclusive Inquiry involves trios of teachers cooperating to find ways of including all students in their lessons, particularly those who are seen as ‘hard to reach’. These might be, for example, migrants, refugees or students with disabilities, as well as others that are receiving special attention. They might also include learners who teachers feel are being overlooked, perhaps because they are quiet or shy.

There are three phases to Inclusive Inquiry (i. e. planning, teaching and analysing), all of which encourage dialogue amongst children and teachers. These phases each require teachers to follow a set of steps. We found that the implementation of these steps can be challenging, not least because of the difficulties of finding the time that is required. There is also a related worry that the approach will be watered down in ways that will reduce the impact and, as a result, lead the approach to be discredited.

In response to these concerns we developed a way of monitoring implementation based on an approach that we had used in previous projects. Influenced by work carried out in Texas many years ago (Hall et al., 1975, p. 52), it involves a ‘levels of use’ instrument, which attempts to “assess what the individual innovation user actually does in using an innovation”. This enables trios of teachers to determine how far they have used the approach. We also found it helpful for university

researchers to join this process in a way that further encourages critical reflection, collaborative learning and mutual critique, as recommended by Wasser and Bresler (1996).

Our monitoring of what happened in the schools involved in the research led us to assess the impacts (Messiou & Ainscow, 2020). Most significantly, there was evidence from all the countries that the involvement of students in Inclusive Inquiry led to students being more engaged in lessons and more positive about themselves as learners, as well as becoming more resilient through their active participation in learning processes.

These impacts were most noticeable amongst those students who had taken the role of researchers. However, in some schools, teachers reported how they had noticed similar impacts on other members of their classes. It was explained that students, in general, seemed to see themselves as having more active roles within classroom activities. This was a result of contributing ideas to the way lessons were designed, as well as sharing their thoughts at the end of each lesson.

The evidence from these studies supports our earlier research which suggested that classroom-based research carried out by practitioners can be a powerful way of moving practice forward within a school (e.g. Ainscow et al., 2012). What is distinctive, however, is the added value that comes from engaging students themselves in the process.

At the same time, it is important to stress that the use of Inclusive Inquiry can meet various organisational obstacles. In particular, it sometimes proved to be challenging of the status quo within schools. Consequently, greater collaboration is needed amongst teachers in order to support the introduction of new practices. This requires organisational flexibility and the active support of senior staff, prepared to encourage and support processes of experimentation. Indeed, it implies the need for cultural change within a school, which is likely to have deeper and longer-term benefits in relation to the promotion of inclusion in schools. This also points to the importance of developing education systems that encourage such changes.

4 Promoting equitable education systems

An ongoing project in the Scottish city of Dundee points to some promising pathways for reforming education systems in relation to inclusion and equity. Launched in January 2021, *Every Dundee Learner Matters* is an ambitious attempt to bring about a change in the way a whole education system goes about addressing the challenge of inclusion and equity. The conditions for achieving this are encouraging in the sense that there is a high-level mandate for the strategy within Dundee.

The guiding vision of *Every Dundee Learner Matters* is of a high performing education system that is at the forefront of developments to find more effective ways of ensuring the education of all students, particularly those who are most vulnerable to underachievement, marginalisation or exclusion.

The strategy is driven by the principle of equity, defined as:

'A process of improving the presence, participation and progress of all children and young people by identifying and addressing contextual barriers'.

It is envisioned that the development of a more inclusive system within the city will be achieved by building the capacity of schools to be self-improving. This involves developing a culture that embraces innovation and increasing practitioner leadership for working together, using inquiry-based approaches to the development of practice, a strategy that had proved to be effective in earlier projects (see: Ainscow, 2024). A strategy group made up of headteachers coordinates and monitors the strategy. This group also has local authority and University representation. In order to provide a clearly defined improvement agenda, *Every Dundee Learner Matters* is focussed on 'Three Ps':

- *Presence* – ensuring that all students attend regularly and promptly;
- *Participation* – creating a climate within schools where all students feel welcome and valued; and
- *Progress* – developing policies and practices that maximise the achievement and ambitions of all students.

In developing the strategy in relation to these outcomes, the following assumptions were made:

- Dundee schools already do well for many students – the aim is to improve the learning of *all* children and young people; and
- Within the schools and their communities there is considerable expertise that can be mobilised to address this agenda – the aim therefore is to move this knowledge around so that it is made available to *all* students, in every school.

Drawing on international research evidence and the insights of local practitioners, *Every Dundee Learner Matters* is built around a series of interconnected design features (Fig. 2).

Contextual analysis is a key feature across the strategy. This involves determining barriers that are preventing the progress of some learners and the resources that can be mobilised in order to overcome these barriers.

With this in mind, the strategy involves a form of school-based collaborative action research that is explained in a guide that schools have been encouraged to follow. This involves attempts to make better use of the existing expertise of teachers and other stakeholders. Importantly, it requires schools to have greater flexibility, within a common framework, to determine how resources are used to address local circumstances.



Fig 2: The design features (own illustration)

The strategy also builds on research which suggests that when teachers are involved in decision-making this is likely to promote a stronger culture for learning within educational settings (Schleicher, 2010). With this in mind, a strategy group made up of headteachers coordinates and monitors the strategy. This group also has local authority and university representation.

The early phase of *Every Dundee Learner Matters* took place during a period of unprecedented challenges, as schools struggled to cope with the continuing impact of the COVID pandemic. During this period, a group of university researchers collected and analysed evidence regarding its implementation. These data indicated high levels of implementation of the strategy across the city's schools:

- Across the education system there is widespread awareness of the strategy and what it sets out to achieve;
- All the schools have established one or more inquiry groups;
- These groups have used collaborative action research to identify and address barriers to the presence, participation and progress of some of their students;
- All schools are members of an improvement partnership set up to share experiences and encourage innovations;
- Education officers and members of the university research team have worked together to support these school-led improvement efforts; and

- A programme of workshops and conferences has taken place to provide support and advice for key people in the field.

The second and third years were seen as the implementation phase. This meant moving the strategy on from what might have seemed like a ‘project’, running alongside the core business of schools, to an approach that is at the centre of each school’s improvement agenda. With this mind the following actions were taken:

- Attention was given to ensuring that school leaders are taking a central role in using inquiry-based strategies to strengthen classroom practices;
- Peer inquiry procedures were introduced that involve senior staff in schools in visiting each other to support and challenge their efforts;
- A professional development programme was introduced to support local authority officers in developing their roles in response to improvement strategies that are increasingly led by schools themselves; and
- Occasional research summaries were used to inform all stakeholders regarding progress in implementing the strategy.

At the same time, further efforts were made to develop the capacity of the head-teachers within the strategy group to take on the role of system leaders. During the third year, this led to a recognition that school attendance had become an increasing concern across the city. With this in mind, the strategy group took action to encourage schools to collaborate in finding ways of addressing this challenge.

The evidence indicates that *Every Dundee Learner Matters* has brought about significant changes in thinking and practice in schools across the city. There is also evidence of impact on student outcomes, as indicated by statistical evidence generated in the summer of 2024. This includes: improvements in overall school attendance; and higher gains in literacy and numeracy at the primary school stage than across the rest of Scotland.

The big challenge now is to ensure that these improvements become sustainable and have an even greater impact on the presence, participation and progress of all learners. This implies developments in organisational cultures based on forms of collaboration that encourage and support problem-solving.

5 Implications for research

The challenging agenda we address in this chapter has particularly important implications for the research community. With this in mind, our own work seeks to contribute to ongoing debates about finding ways of ensuring that educational research has an impact on thinking and practice in the field.

We connect our work to the growing movement towards building *research-practice partnerships* (Sharples et al., 2023). This momentum has largely been fuelled by the recognition that educational change and the construction of more equitable

education structures requires different educational actors to be active participants in the process. The overall aim is to create new forms of knowledge and feed these into systems through social learning approaches.

As a result of their analysis of recent developments in the field, Farrell et al. (2021) define a research-practice partnership in education as:

A long-term collaboration aimed at educational improvement or equitable transformation through engagement with research. These partnerships are intentionally organized to connect diverse forms of expertise and shift power relations in the research endeavor to ensure that all partners have a say in the joint work. (Farrell et al., 2021, p. iv)

Using this definition, Farrell and colleagues go on to highlight the differences between research-practice partnerships and other kinds of collaboration in education in that they are: long-term; work toward educational improvement, or equitable transformation; feature engagement with research as a leading activity; are intentionally organized to bring together a diversity of expertise; and employ strategies to shift power relations in research in order to ensure that all participants have a say.

As in the examples we have presented, the prolonged contact that such partnerships involve enables us to gain a detailed knowledge of the locality, as well as the institutions and systems – and the assumptions inherent within these – that structure local activity. This time spent in the field also allows the researcher to identify and explore problems of practice, as well as test out and refine potential solutions, in ways that create knowledge and understanding as to “why, how, and under what conditions programmes and policies work” (Gutiérrez & Penuel 2014, p. 1).

Meanwhile, for practitioners this prolonged contact not only enables them to understand aspects of their local contexts in confronting their own professional assumptions. They are also likely to have a greater understanding of research findings generated where they have been actively involved in this process. Furthermore, they have ready access to guidance and support in terms of applying research-informed solutions into local development strategies.

6 Final thoughts

The forms of collaborative research described in this contribution are intended to have a direct impact within particular contexts, whilst, at the same time, generating ideas that have wider relevance. Within such projects, we see our role as working alongside practitioners, students and others in developing the best possible propositions about what will promote inclusion within a given situation and develop more resilient education systems.

What emerges from attempts to act on these propositions is not a finely tuned and context independent set of practices that can be transferred wholesale to

other sites. Rather, the practices developed in one place, together with their underpinning rationale, become an elaborated set of ideas and examples to be put forward for consideration in other contexts. In this way, barriers to participation and learning are addressed and improvement pathways are developed through the collective efforts of the various stakeholders involved, creating more resilient education systems.

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