Inclusive Education in Situated Contexts: A Social Constructivist Approach

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We inhabit a universe that is
characterised by diversity.

DESMOND TUTU

Abstract (English)

The presented publication-based dissertation analyses inclusive education in situated contexts and takes on different perspectives on the complex phenomenon of inclusive education in diverse contexts. Social constructivism serves as epistemological approach to the inquiry and enables exploration of different constructions of diverse actors. This work uses a dilemmatic approach to inclusive education and explores tensions and dilemmas in this field. The research questions of how inclusive education is implemented in specific contexts, how inclusive education is constructed by different stakeholders, and how inclusive education is constructed through research are investigated. This work highlights that both research and practice need to acknowledge the ambiguity, fluidity, and complexity of inclusive education instead of looking for easy solutions on how to do inclusion. At the same time, a discourse is needed about what qualifies as inclusive education – and what cannot be legitimately declared as inclusive practices.

Keywords: inclusive education, global North, global South, Malawi, Guatemala, social constructivism, dilemma

Abstract (Deutsch)

Die vorliegende kumulative Dissertation setzt sich mit inklusiver Bildung in unterschiedlichen Kontexten auseinander und nimmt verschiedene Perspektiven auf das komplexe Phänomen inklusive Bildung ein. Der Sozialkonstruktivismus dient als grundlegender erkenntnistheoretischer Zugang und ermöglich es, verschiedene Konstruktionen unterschiedlicher Akteure von inklusiver Bildung zu erforschen. Diese Arbeit verwendet einen dilemmatischen Theorieansatz und untersucht Spannungsfelder und Dilemmata in der inklusiven Bildung. Die Forschungsfragen wie inklusive Bildung in spezifischen Kontexten umgesetzt wird, wie inklusive Bildung von verschiedenen Akteuren konstruiert wird und wie inklusive Bildung durch Forschung konstruiert wurden untersucht. Die vorliegende Arbeit stellt heraus, dass Forschung und Praxis die Ambiguität und Komplexität von inklusiven Bildung anerkennen müssen, anstatt nach konkreten Vorgaben für die Umsetzung zu suchen. Gleichzeitig ist ein Diskurs darüber erforderlich, was als inklusive Bildung gilt – und was nicht rechtmäßig als inklusive Praktiken deklariert werden kann.

Schlagworte: inklusive Bildung, globaler Norden, globaler Süden, Malawi, Guatemala, Sozialkonstruktivismus, Dilemmata

Contents

List of Abbreviations

AIDS	Acquired Immune Deficiency Syndrome
BMZ	Bundesministerium für wirtschaftliche Zusammenarbeit und Entwicklung/Federal Ministry for Economic Cooperation and Development
CBR	Community-Based Rehabilitation
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
HIV	Human Immunodeficiency Virus
IE	Inclusive Education
Refie	Research for Inclusive Education in International Cooperation
SADC	Southern African Development Community
UN	United Nations
UNESCO	United Nations Educational, Scientific and Cultural Organization
WHO	World Health Organization
NGO	Non Governmental Organization

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Summary

This work originates from the international research project *Research for Inclusive Education in International Cooperation (Refie),* which was conducted between 2013 and 2015 in Guatemala and Malawi. The presented publication-based dissertation analyses inclusive education in situated contexts and takes on different perspectives on the complex phenomenon of inclusive education in diverse contexts. Social constructivism serves as epistemological approach to the inquiry and enables exploration of different constructions of diverse actors. This work uses a dilemmatic approach to inclusive education and explores tensions and dilemmas in this field.

The following overall research questions are investigated:

- How is inclusive education implemented in specific contexts?
- How is inclusive education constructed by different stakeholders?
- How is inclusive education constructed through research?

The findings of the single publications can be condensed to the following dilemmas:

- **Dilemma of shared understanding and contextualisation**: As no unanimous notion of inclusive education exists, multilevel discourses on the understanding and implementation of inclusive education are needed. At the same time, the notion of inclusion needs to be developed context-specific and should not be imposed from one context to another.
- **Dilemma of uniqueness and commonality**: Human rights can be perceived as conflicting when experiences of exclusion and oppression exists. Some groups see their uniqueness at stake in an inclusive system and claim a right to exclusion.
- **Dilemma of promises and social reality**: The promises of education for economic prosperity and social participation remain unfulfilled in some contexts, and consequently the promise of inclusive education, which is built on the promise of social inclusion and justice, becomes elusive.

This work highlights that both research and practice need to acknowledge the ambiguity, fluidity, and complexity of inclusive education instead of looking for easy solutions on how to do inclusion. At the same time, a discourse is needed about what qualifies as inclusive education – and what cannot be legitimately declared as inclusive practices.

Zusammenfassung

Die vorliegende kumulative Dissertation entstand vor dem Hintergrund des internationalen Forschungsprojekts *Research for Inclusive Education in International Cooperation (Refie)*, das zwischen 2013 und 2015 in Guatemala und Malawi durchgeführt wurde. Diese Arbeit setzt sich mit inklusiver Bildung in unterschiedlichen Kontexten auseinander und nimmt verschiedene Perspektiven auf das komplexe Phänomen inklusive Bildung ein. Der Sozialkonstruktivismus dient als grundlegender erkenntnistheoretischer Zugang und ermöglich es, verschiedene Konstruktionen unterschiedlicher Akteure von inklusiver Bildung zu erforschen. Diese Arbeit verwendet einen dilemmatischen Theorieansatz und untersucht Spannungsfelder und Dilemmata in der inklusiven Bildung.

Die folgenden übergreifenden Forschungsfragen werden untersucht:

- Wie wird inklusive Bildung in spezifischen Kontexten umgesetzt?
- Wie wird inklusive Bildung von verschiedenen Akteuren konstruiert?
- Wie wird inklusive Bildung durch Forschung konstruiert?

Die Ergebnisse der einzelnen Beiträge kondensieren sich in folgenden Dilemmata:

- **Dilemma von einem gemeinsamen Verständnis und Kontextualisierung**: Da es keine einheitliche Vorstellung von inklusiver Bildung gibt, sind Diskurse über das Verständnis und die Umsetzung von inklusiver Bildung auf allen Ebenen des Bildungssystems notwendig. Gleichzeitig muss ein Verständnis von inklusiver Bildung kontextspezifisch entwickelt werden und sollte nicht von extern aufgezwungen werden.
- **Dilemma von Differenz und Gemeinsamkeit**: Menschenrechte können als miteinander kollidierend wahrgenommen werden, wenn Erfahrungen von Ausgrenzung und Unterdrückung existieren. Einzelne Gruppen sehen ihre Unterschiedlichkeit innerhalb eines inklusiven Systems in Gefahr und fordern ein Recht auf Exklusion ein.
- **Dilemma von Versprechen und gesellschaftlicher Realität**: Bildung verspricht soziale Aufstiegschancen. Inklusive Bildung geht noch darüber hinaus und fußt auf einem Versprechen von sozialer Gerechtigkeit. In einigen gesellschaftlichen Kontexten bleiben die Versprechungen von Bildung unerfüllt, somit wird auch das Versprechen der Inklusion illusorisch.

Die vorliegende Arbeit stellt heraus, dass Forschung und Praxis die Ambiguität und Komplexität von inklusiven Bildung anerkennen müssen, anstatt nach konkreten Vorgaben für die Umsetzung zu suchen. Gleichzeitig ist ein Diskurs darüber erforderlich, was als inklusive Bildung gilt – und was nicht rechtmäßig als inklusive Praktiken deklariert werden kann.

1 Introduction

The implementation of inclusive education is currently high on the agenda of most educational systems around the globe. At the same time, the concept and terminology of inclusion are ambiguous and the question of how to implement inclusive education remains open. This work is guided by the fundamental question: What is inclusive education? Many current discourses in the field of education centre explicitly or implicitly around this question. In these discourses, different theoretical references are used and the purposes and scope of inclusive education are variously defined. Different discourses and different forms of implementation evolved in various parts of the world, each influenced by its specific socio-historical, economic, and political context.

The starting point for this work formed the *Research for Inclusive Education in International Cooperation* project that was conducted between 2013 and 2015 and investigated inclusive education in Guatemala and Malawi. Based on this project, I am exploring in the hereby-presented work how inclusive education is **implemented** in Guatemala and Malawi, how inclusive education is **constructed** by different stakeholders in these two countries, and how inclusive education is **researched**.

This publication-based dissertation takes on different perspectives on the phenomenon of inclusive education. Several dimensions of inclusive education and subthemes in different contexts are explored with the use of various theoretical approaches and methods. Multiple perspectives of stakeholders on several levels of the education systems contributed to the multidimensional research design. This leads to knowledge construction on several degrees. Social constructivism provides an appropriate structure to actualise this complex approach.

Both German-speaking scholars from Germany and Austria and English-speaking scholars from Africa, Australasia, Europe, and North America inform this work. From my point of view, it is relevant for this work to include all these perspectives and at the same time to be aware of each perspective's background. As a German-native speaker going through academic training mainly in Germany, my approach to research is originally influenced by discourses, concepts, and terms from German-language literature. As this work is published in English and draws on studies and discourses of English-speaking scholars, it is also necessary to refer additionally to English literature in the theoretical and methodological discussions. The role of scholars from southern Africa becomes especially relevant in the parts of this work that describe the southern African context in general and (inclusive) education in this region in particular.

This work is organised in the following way. Chapter 2 begins by clarifying key terms. This terminological elaboration foreshadows pitfalls of binary descriptions and how power can be exercised through language. The chapter then goes on to outline **how** the research object is approached, that is, social constructivism as epistemological approach. Subsequently, a detailed description of the research object presents **what** is investigated in this work. The chapter closes with mapping out several theoretical approaches to inclusive education and describing the perspectives and definition on which this work is based.

Chapter 3 turns to research on inclusive education and discusses challenges for research as a result of the terminological and theoretical ambiguities. Furthermore, this chapter explores how inclusive education is constructed through research.

Due to the focus described in chapters 2 and 3, it is necessary to position this work in the field of Comparative and International Education. Chapter 4 introduces this field and outlines key characteristics and their effects on the research design.

Chapter 5 presents the research design and first maps out how the single publications emerged from the *Research for Inclusive Education in International Cooperation (Refie)* project. Second, the overall research questions are presented in terms of how they relate to the specific questions in the single publications. Third, this chapter describes how research itself is a process of constructing knowledge and points out to what degree of knowledge construction each research question refers. Lastly, this chapter states the overall methodological approach of the study and examines aspects regarding the relationship of theoretical and empirical considerations.

Chapter 6 introduces each of the five publications that are fully included in chapter 7. The publication Hummel, Engelbrecht, and Werning (2016) reformulates the Refie research results on Malawi and presents emerging tensions from the findings. In Hummel (2016), the Malawi results are reconsidered in the light of the educational governance approach. This is the only publication in German; an English summary is inserted after the original publication. The two following publications (Hummel & Engelbrecht, 2018; Hummel & Werning, 2016) are a new analysis of data from the research project under new thematic orientations. Hummel and Engelbrecht (2018) looks at constructions of diversity in the context of Malawian teacher education programmes and Hummel and Werning (2016) aims at portraying the specifics of inclusive education in Guatemala and Malawi. The last publication (Hummel, submitted) develops a new research question based on the previous findings and analyses data newly collected through a literature review. This publication assesses how the

definitions of inclusion and the rationale for inclusion are constructed in the academic discourse in southern Africa. Four of the five articles are already published and three of those are peer-reviewed.

The final chapter draws upon the entire thesis, tying up the various theoretical and empirical strands. First, it summarises the empirical results of the publications, structured according to the three overall research questions. Subsequently, the results are related back to the international discourses and existing knowledge base and interpreted according to identified dilemmas and tensions emerging from the findings. After a critical self-reflection on the work, the chapter concludes with a discussion of the implications of the findings for research and practice.

2 Theoretical Framework

This work revolves around inclusive education in different contexts. A regional focus of this work is on Guatemala, Malawi, and southern Africa – countries that are often described as *developing countries*. As the term *development* is inevitable in this context, the first section of this chapter deconstructs this term, criticises its use and introduces the terminology applied in this work. Other pivotal terms in this context are *international*, *global*, and *universal*, which are often used synonymously. The section clarifies these terms in their fundamental meanings. The second section outlines social constructivism and its consequences for qualitative research in general and this work in particular, as this work applies a social constructivist perspective as epistemological approach. The following section explores the overall object of analysis and describes the divergent geneses of inclusive education in different parts of the world. Different definitions and categorisations regarding inclusive education are presented and debated. This section goes on to debate the implementation of inclusive education in southern Africa by drawing on the current international discourses of the field. Finally, this chapter maps out several theoretical approaches to inclusive education and describes the perspectives and definition on which this work is based.

2.1 Terminology

Describing and comparing characteristics of different countries usually results in grouping these countries according to predominating aspects. During the Cold War, the world was divided into a Western, capitalist bloc that was called the First World and the Eastern, socialist bloc also known as the Second World. All non-aligned countries formed the so-called Third World. This categorisation became obsolete after the fall of the Berlin Wall and the collapse of the Soviet Union.

Nowadays, a *development* terminology is in predominant use, in particular in the area of politics, describing countries as *developing* or *developed*. However, this terminology is highly contested as it carries a strong normative orientation (Kendall, 2009). The use of the term *development* needs to be contemplated before two fundamental questions: What defines development? Who defines development?

Even though no generally acknowledged definition of development exists, definitions consistently draw on historically Western concepts, such as linear progress, nation-state, individualism, and state-organised mass schooling (Kendall,

2009). These underlying conceptualisations are transferred through the term *development* to other regions, measuring and assessing the (lack of) achievement by other countries. Singal and Muthukrishna (2014) describe the so-called *developing countries* as being characterised by a complex set of inequalities, dependencies, and colonial legacies. The interrelation of colonialism and development is framed by Kothari as "where colonialism left off, development took over" (cited in Watts, 2005, p. 55). In summary, development can be perceived as a construction of the *so-called developed world*, using it over the *so-called less developed*.

Considering *development* as a "construct rather than an objective state" (Gardner & Lewis, 1996) derives from post-colonial, post-modern, and feminist theories, which are grounded in the common intent to "challenge earlier assumptions about the nature of knowledge and progress" (Robinson-Pant, 2001; see also section 2.2). Through this theoretical tradition, development became regarded as discourse. This perspective enables us to discuss questions like: What are legitimate ways of talking and acting? Who legitimates and controls discourses? What can be said and what is excluded in the development discourses? How do development discourses construct the object of development (Grillo & Stirrat, 1997)? Deconstructing the dominant development discourse is one way of challenging the hegemonic nature of the development concept. Other writers (e.g., Engelbrecht & Green, 2018a; Kalyanpur, 2016; Singal, 2010; Singal & Muthukrishna, 2014) vote for using alternative terms to describe the "stark inequalities and dependencies between countries divided not only by geographical boundaries, but also by fundamentally different economic and cultural histories" (Engelbrecht & Green, 2018a, p. 4).

The alternative denomination of countries as *global North* and *South* is increasingly applied in order to avoid the contested terminology *development*. Though geographically incorrect, North America, Japan, Western Europe, and Australasia are usually counted to the North, whereas Africa, Asia, Eastern Europe, Latin America, the Caribbean, and the Pacific form the South (Sutcliffe, 2005). The core of the Northern countries "were the imperial powers and now continue to be the major centers of global capitalism. These countries control key mechanisms of global economic and political decision-making" (Singal & Muthukrishna, 2014, p. 294), whereas the countries of the South „share the legacy of having been conquered or controlled by modern imperial powers, resulting in a continued legacy of dependency, poverty and exploitation" (Singal & Muthukrishna, 2014, p. 293f).

This terminology is widely criticised for the obvious inaccuracy of its geographic reference. Another major criticism of all binary labels is that they "assume and fix the focus of developmentalist debates on states at a time when divisions between rich and poor, 'North' and 'South' are as great or greater within countries as across them" (Kendall, 2009, p. 421). All binary categorisations neglect the heterogeneity between countries of one category and even, as mentioned above, within one country.

These terminological pitfalls and the lack of a widely acknowledged term that takes the previously discussed criticism into account becomes visible in the used terminology in the different publications of this research. In some publications (Hummel, 2016; Hummel, Engelbrecht, & Werning, 2016; Hummel & Werning, 2016) the co-authors and I apply the terminology *so-called developing countries*. The use of this terminology follows the widespread use of the development terminology, but indicating through the prefix *so-called* a certain distancing and no unconditional acceptance of the implications of the terminology. In other publications (Hummel & Engelbrecht, 2018; Hummel, submitted) we use the terms *global North* and *South*. This inconsistency is founded in differing contexts of publications, each with its own influences, e.g., by editors. I fully agree with the above-mentioned criticism of generalisation though binary descriptions. I find the use of the terminology North/South as defined by Singal and Muthukrishna (2014) useful, as it stresses power relations between countries that are relevant to any kind of international cooperation. However, attributing countries to either the global North or South is only one dimension of a necessary multidimensional perspective. Therefore, the description and consideration of the respective contexts is essential for any research in an international setting (see section 4.2).

This section has gone beyond a mere terminological reflection and foreshadows the relevance of global power dynamics in economy, politics, and academia, which will continue to be relevant throughout this work.

Another set of terms essential for this research is *international, supranational, transnational, global*, and *universal,* which are partially oversimplified used as synonyms, sometimes in contrast to each other.

International traditionally refers to inter-governmental relations (Kendall, 2009). In this perspective the nation state acts as pivotal unit in, e.g., educational politics, but with a changing role over the last decades (Cowen, 2009; see chapter 4). *Internationalisation* as concept therefore is based on the existence of sovereign

nation states and the interrelation between them (Parreira do Amaral, 2011). In terms of education, UNESCO is an institution with a long history in promoting and facilitating internationalisation in education.

Supranationalisation describes processes where nation states pass aspects of their national sovereignty over to a higher level and binding decisions are made beyond the level of nation state. The Bologna process of the European Union is an example of a development that was initiated on the national level, but resulted in nation states being obliged to certain supranational requirements (Parreira do Amaral, 2011).

Global is widely used as synonym for *international*, but actually focuses on the increase and intensification of relations across boarders (Adick, 2008). *Globalisation* is a complex term with diverging meanings depending on the angle of consideration. As a collective term, *globalisation* describes economic, social, political, and cultural[1] processes of transformation of modern societies since the 1970s (Parreira do Amaral, 2011). *Globalisation* "can thus be defined as the intensification of worldwide social relations which link distant localities in such a way that local happenings are shaped by events occurring many miles away and vice versa" (Giddens, 1990, p. 64).

The *transnational* level came to the fore of education during the past ten to fifteen years. This level describes structures beyond and detached from the nation state (Adick, 2008). Again, this term carries various notions (Adick, 2005), which are too comprehensive to be unfolded here. Lately, the perspective of *transnational education spaces* as analytical lens in Comparative and International Education is increasingly discussed in the field (Gogolin & Sander, 2004; Möller & Wischmeyer, 2013).

Universal phenomena factually occur worldwide or at least claim to do so. Human rights, e.g., are claimed to have a universal validity (Adick, 2008).

Section 2.3.2 discusses the question in what ways inclusive education is an international, global, or universal concept.

[1] Numerous differing definitions of culture exist and several attempts of categorising definitions have been undertaken (e.g., Jahoda, 2012; Reckwitz, 2000). I apply a definition of culture according to Spencer-Oatey (2000): "Culture is a fuzzy set of attitudes, believes, behavioural conventions, and basic assumptions and values that are shared by a group of people, and that influence each member's behaviour and each member's interpretations of the 'meaning' of other people's behaviour" (p. 4). In this understanding, culture is related to social groups, however, two individuals within a group never share the exact same cultural characteristics (Spencer-Oatey & Franklin, 2009).

2.2 Epistemological Approach: Social Constructivism

Constructivism[2] is influenced by several different disciplines and serves as an umbrella concept for a number of programmes with diverse starting points (Flick, 2014a, p. 76). Basically, constructivism can be juxtaposed to positivism. The latter emerged from natural sciences and assumes that there is an external reality existing independently from our perceptions and descriptions. In a positivist view, this external reality can be objectively observed with rigorous scientific methods. Positivism insists on the use of the same methods of inquiry for both natural and social sciences and a value-free approach to all scientific actions (Bryman, 2008). Constructivism, on the contrary, views "knowledge and truth as created not discovered" (Andrews, 2012, p. 40). All constructivist approaches have in common that they challenge the relation to reality through looking at constructive processes in accessing this reality. Constructivists are concerned with how knowledge is formed and what criteria can be applied in evaluating it (Flick, 2014b).

Flick (2014a) subdivides constructivism into three main strands:

- Constructivism in the tradition of Piaget (1954) considers individual perception, cognition, and knowledge as constructs.
- Social constructivism in the tradition of Schütz (1971), Berger and Luckmann (1966), and Gergen (1985; 2015) focuses on social, cultural, and historical conventions in processes of perception and knowledge construction.
- Constructivist sociology of science inquires how social, historical, local, and other factors influence scientific knowledge creation in a way that scientific facts are considered as social constructs (Fleck, 1980).

The subfield of social constructivism is characterised by similar but varying positions as well. Burr (2015) formulates with reference to Gergen (1985) four key assumptions, which all social constructivist positions share:

- Social constructivism regards the production of knowledge as happening in the interaction between people. Therefore, social processes and in particular the role of language are of specific interest for social constructivists.
- Social constructivism challenges taken-for-granted ideas and knowledge. "It invites us to be critical of the idea that our observations of the world unproblematically yield its nature to us, to challenge the view that

[2] Some writers distinguish between constructivism and constructionism. However, this differentiation has not asserted itself and both terms are currently used mainly interchangeably (Andrews, 2012).

conventional knowledge is based upon objective, unbiased observation of the world" (Burr, 2015, p. 2).

- Social constructivism understands categories and concepts used in understanding our world, and therefore knowledge in general, as historically and culturally specific. "The terms in which the world is understood are social artifacts, products of historically situated interchanges among people" (Gergen, 1985, p. 267). Social constructivists therefore challenge the imposition of one knowledge system considered as superior over another. This can result in questioning existing conditions and statuses. This perspective forms in particular an adequate stance for research in the field of Comparative and International Education (see chapter 4).
- "Descriptions and explanations of the world themselves constitute forms of social action" (Gergen, 1985, p. 268). Socially constructed knowledge has an impact on social action. For example, how inclusive education is conceived by certain actors has a direct impact on how it is implemented. This knowledge impacts social actions, which then also affect power structures and relations. Through challenging taken-for-granted understandings of the world, existing power structures and relations can become unsettled.

All these assumptions underpin the post-modern philosophical position that no one can claim to have the ultimate truth and that the complexity of our reality can only be represented through several coexisting and legitimate descriptions (Ameln, 2004). Some implications of this position and subsequent possible dangers will be discussed in more detail later in this section.

The relationship between the individual and society forms one essential epistemic interest in social sciences in general. One conceptualisation of this relation in the perspective of social constructivism – and one often referred to as the foundational work of social constructivism – comes from Berger and Luckmann (1966), which informs in particular the analysis in Hummel (submitted). Berger and Luckmann (1966) debate the question of how on the one hand the individual constructs social reality and at the same time reality is perceived as objectively determined. The relationship between individual and society is conceived as dialectical process:

> human beings continually construct the social world, which then becomes a reality to which they must respond. So although human beings construct the social world they cannot construct it in any way they choose. At birth they enter a world already constructed by their predecessors and this world assumes the status of an objective reality for them and for later generations. (Burr, 2015, p. 210)

Therefore, the individual is considered as agentic, actively constructing and re-constructing reality, and constrained by society in the processes of construction and re-construction at the same time. The question of how constructed knowledge of different individuals evolves into a commonly shared understanding of reality is reflected in the hereby-explored research object of constructions of inclusive education.

Language plays a pivotal role in social processes of knowledge construction as language and thought interact in many ways and can not be regarded as inseparable. Some linguists even go as far as to claim that the language an individual speaks determines thoughts and actions and that some texts are fundamentally untranslatable to other languages (Sapir, 1973). Constructivists argue that concepts used do not pre-date language, in fact they are made possible by it (Burr, 2015, p. 53). Consequently, the concept of discourse is applied to be able to focus on language issues in the knowledge construction processes. The term is used in different theoretical understandings with several methodological implications. In the Foucaultian understanding, which is also applied in Hummel (submitted), discourse is defined not "as groups of signs (signifying elements referring to contents or representations) but as practices that systematically form the objects of which they speak" (Foucault, 2010, p. 49). Foucault includes in this understanding not only language, but also social practices in discourse and emphasises the relation between discourse and the material world. "Discourse, Foucault argues, constructs the topic. It defines and produces the object of knowledge. It governs the way that a topic can be meaningfully talked about and reasoned about. It also influences how ideas are put into practice and used to regulate the conduct of others." (Hall, 2001, p. 72).

Hacking (2003) expresses through his critical question *The social construction of what?* that nearly everything has been declared as socially constructed. Whereas categories such as gender, disability, and race are widely accepted as social constructs (Anastasiou & Kauffman, 2011; West & Fenstermaker, 1995), the description of, e.g., cancer, death, facts, quarks, or global warming as socially constructed usually triggers a strong and broad resistance. This leads to what is often referred to as realism-relativism debate (Burr, 2015, p. 101), in which constructivism allegedly denies the existence of an objective reality. Laclau and Mouffe (2001) reply thereto:

> The fact that every object is constituted as an object of discourse has nothing to do with whether there is a world external to thought, or with the realism/idealism opposition. An earthquake or the falling of a brick is an

> event that certainly exists, in the sense that it occurs here and now, independently of my will. But whether their specificity as objects is constructed in terms of 'natural phenomena' or 'expressions of the wrath of God', depends upon the structuring of a discursive field. What is denied [by discourse theory] is not that such objects exist externally to thought, but the rather different assertion that they could constitute themselves as objects outside any discursive condition of emergence. (p. 108, emphasis in original)

Gergen (2015) maintains this position as he argues: "constructionists don't try to rule on what is or is not *fundamentally* real. Whatever is, simply is. *However*, the moment we begin to describe or specify what there is – what is truly or objectively real – we enter a world of discourse" (p. 219, emphasis in original).

The question embedded therein of what can be described as objective truth has been widely discussed in public lately. Since the rise of populist movements during the past years in several countries around the world (Galston, 2017; Häusler, 2018; Sterne & Rama, 2017), generally recognised facts and customary ways of argumentation have been audaciously challenged. These populists use the same line of argumentation as constructivists: nothing can claim to be of ultimate truth. Thus they derive their right to claim as fact or truth whatever helps the respective political agenda. This development has caused constructivists and other postmodern scholars to ask, e.g., "Has Trump stolen philosophy's critical tools?" (Williams, 2017) or "Are we complicit? Talking social constructionism in the age of Trump" (Whooley, 2017). This public debate about truth-claims, the judgement of facts and the influence of emotions and opinions on (political) decision-making has just started to inform debates among scholars. The question of whether social constructivism in the so-called post-truth era is in an existential crises, whether positivist and realist perspectives are on the rise again, and what arguments constructivism can provide in the current debate, is at this point of time uncertain.

Glasersfeld (1995) states that "it is certainly not the case that 'anything goes'" (p. 118) and develops the concept of viability as quality criterion for knowledge. Because knowledge does not objectively portray reality in the constructivist perspective, it is not possible to assess whether our representation of the world matches with reality, and therefore whether our constructions are *true*. Viable knowledge describes concepts based on experiences that have proven to be useful and can survive further experiences. Corroboration by others helps to achieve second-order viability: knowledge that is not only useful for the individual, but also to others. Consensus of the respective community therefore is a crucial principle in the assessment of knowledge regarding viability.

Regarding knowledge as constructed, this applies consequently also for scientific knowledge. Therefore, research in itself is a process of construction. Schütz (1971) distinguishes between constructions of first and second degree: constructions of sociologists are therefore second degree constructions as these are constructions of constructions of the research subjects. Burr (2015) describes in this mindset her activities in publishing as "the social construction of social constructionism" (p. 15). I explicitly also declare the hereby-presented work as constructed in specific historical and cultural contexts. In section 5.3 I add a third level of constructions to Schütz's categorisation and put my research questions in relation to the levels of constructions. Section 5.4 discusses constructions of researchers in relation to validity of research results.

This section described *how* – that is, with what epistemological perspective – I approach the object of analysis. On this basis, the following section provides a detailed description of the object of analysis that relates to *what* is researched in this work.

2.3 Object of Analysis

This section is concerned with clarifying inclusive education, which forms the overall object of analysis, in its historical and terminological developments. Economic, political, and societal developments over the past decades also had significant influence on inclusive education, however, this section is limited to historical and terminological aspects. As these aspects are tightly interwoven, they are presented alongside each other in section 2.3.1 with a specific focus on divergent geneses of inclusive education in different parts of the world. This section is enhanced by discussing different definitions and categorisations of definitions regarding inclusion. Section 2.3.2 highlights the global dimension of inclusive education, whereas the following will elaborate on the situation in southern Africa.

2.3.1 Inclusive Education: Terminological and Historical Developments

The notion of inclusive education is both complex and elusive. In a nutshell, it means different things in different contexts to different people. On the one hand inclusive education is ubiquitous (Slee, 2009) and currently a highly influential concept (Göransson & Nilholm, 2014) and at the same time described as both ambitious (Artiles, Kozleski, Dorn, & Christensen, 2006, p. 67) and contentious (Opertti, Walker, & Zhang, 2014, p. 149). Some scholars imply that the meaning of inclusion

"conveniently blurs" (Armstrong, Armstrong, & Spandagou, 2010, p. 4) and therefore "may end up meaning everything and nothing at the same time" (Armstrong et al., 2010, p. 29).

Even though each country has developed its unique formal education system, that is influenced by a variety of contextual factors, certain similarities with regards to schooling of children who are perceived as outside the norm can be identified in the countries of the North. After a time of excluding these students from formal education, most countries established separate provisions for learners with special educational needs. Very differentiated and therefore resource-intensive segregated systems with special schools for different kinds of disabilities evolved over time (Artiles et al., 2006) and form still an integral part of many educational systems. This historically evolved system of segregation was eroded by integration initiatives as certain learners were moved under certain conditions to mainstream classrooms. Nowadays, these integration initiatives are partially declared as inclusive and partially criticised as not congruent with the principles of inclusion, because it is not given that "all learners have an unquestioned right to belong in a mainstream school and classroom" (Engelbrecht & Green, 2018a, p. 5). A multifaceted critique of the comprehensive segregated system with selected cases of integration led to initiatives for an inclusive education system in the North.

The discourses on inclusion initially originated focusing on children with disabilities, and in some notions of inclusion, this group still forms nowadays the main focus of inclusion efforts. Other notions expanded the focus and address all learners vulnerable due to being different in other dimensions, e.g., ethnicity, culture, language, migration experience. Given these different understandings of the concept of inclusion, Dyson (1999) points out that it could be appropriate to talk about *inclusions*. He elaborates that "these ambiguities arise from different discourses, through which different theoretical notions of inclusion are constructed" (p. 36). According to Dyson, the rationale for inclusive education originates, on the one hand, from a rights and ethics discourse that debates the interrelation of inclusion and social justice. On the other hand, the efficacy discourse discusses the question of whether inclusive schools are more effective educationally and cost-efficient compared to segregated special education.

These various definitions of inclusive education are categorised by Göransson and Nilholm (2014) and Ainscow, Booth, and Dyson (2006). Both categorisations share that definitions are situated between the poles narrow and broad. Narrow

definitions describe inclusion as placement of pupils with disabilities/in need of special support in general education classrooms. Broad definitions regard inclusion as a principled approach to education and society in general. Definitions which consider inclusion as meeting the social and academic needs of pupils from a specific vulnerable group, or of all students in their diversity, are located somewhere between these two poles.

Current initiatives towards inclusive education in countries of the South developed from a very different starting point. The major challenge in the second half of the last century for countries in the South, which are usually characterised by low national income, were great numbers of out-of-school children (United Nations Educational, Scientific, and Cultural Organization [UNESCO], 1990, p. 1). This has led governments to adopt the World Declaration on Education for All in Jomtien in 1990 with the overarching aim that "every person – child, youth and adult – shall be able to benefit from educational opportunities designed to meet their basic learning needs" (UNESCO, 1990, p. 3). Even though the terminology of inclusion is not used in the declaration, Miles and Singal (2009) conclude that "it acknowledged that large numbers of vulnerable and marginalised groups of learners were excluded from education systems worldwide" (p. 3) and the World Conference therefore was "a landmark conference in the development of thinking about inclusive education" (p. 3).

The Salamanca Statement and Framework for Action on Special Needs Education (UNESCO, 1994) is widely considered the most influential document in inclusive education for a majority of countries (Ainscow, 1999). Governments around the world signed the Statement, which was meant to address countries worldwide. It refers to the Education for All commitment and calls upon all governments "to improve their education systems to enable them to include all children regardless of individual differences or difficulties" (UNESCO, 1994, p. ix). The following Dakar Framework for Action confirms the Education for All goals and stresses that a "key challenge is to ensure that the broad vision of Education for All as an inclusive concept is reflected in national government and funding agency policies" (UNESCO, 2000, p. 14).

Kiuppis (2013) outlines how both programmes – the Education for All agenda and the inclusive education agenda – emerged within UNESCO, the "lead agency in multilateral education" (Jones & Coleman, 2012, p. 44), whereas the Education for All programme stems from the general education unit within UNESCO and the

inclusive education agenda originally developed from special education programmes. Kiuppis analysed the use of the inclusion terminology within UNESCO and comes to the conclusion that the Salamanca Statement

> did not only leave leeway for different implementations of the objectives formulated therein, but was, in fact already before the moment of its endorsement, open for contradicting interpretations. Hence, the current variety of meanings attributed to inclusive education cannot be considered as resulting from a diversification of meanings due to different paths of development with the same starting point. Instead, the data suggest that already the start of the 'new thinking' in special needs education at the conference in Salamanca entailed different meanings in terms of differing uses of the word 'inclusive education'. (Kiuppis, 2013, p. 754)

A further milestone in the history of inclusion is the UN Convention on the Rights of Persons with Disabilities, which obligates the signatory states to "ensure an inclusive education system at all levels" (United Nations [UN], 2006, p. 16). On the one hand, the Convention significantly contributed to the promotion of inclusive education and proclaimed access to inclusive education as a legal right (Powell & Merz-Atalik, submitted). At the same time, however, it supported a focus on children, youth and adults with disabilities in the light of inclusion and therefore narrowed down the focus on this category of difference as a negative side-effect (Merz-Atalik, 2014, p. 26). This Convention and the subsequently published General Comment on Art. 24 (United Nations Committee on the Rights of Persons with Disabilities, 2016) contributed to the development of a globally shared understanding of inclusive education by turning inclusive education into an actionable human right.

In summary, inclusive education emerged from different challenges and serves different purposes in the North and South. The concept and terminology of inclusive education has emerged from educational reforms in the North. A critique of segregation and a discourse on efficacy lead to inclusion efforts in the North, however with varying understandings of inclusive education. In the South, inclusive education is mainly instituted to increase access to schools and to achieve Education for All. The South imported the inclusive education terminology through global declarations. As shown, inclusive education has multiple meanings constructed through discursive practices by different actors in different regions. Analysing different constructions, their formation and their relation to inclusive practices forms the core intention of this study.

2.3.2 Inclusive Education From a Global Perspective

Inclusive education is generally described as an international movement (Artiles & Dyson, 2005), global paradigm (Le Fanu, 2015), or global goal (Powell et al., submitted). Adick (2005) argues that descriptors like *international*, *global* and *universal* carry both a factual and a normative dimension (see also section 2.1). The *World* Conference on Education for All in Jomtien (UNESCO, 1990), the *World* Education Forum in Dakar (UNESCO, 2000) and the *World* Conference on Special Needs Education (UNESCO, 1994) emphasis the worldwide and therefore global nature of these conferences and the thereto related declarations. UNESCO claims that "these documents represent a *worldwide consensus* on future directions for special needs education" (UNESCO, 1994, p. iv, emphasis added). The participants of the World Education Forum in Dakar committed themselves "to the achievement of education for all (EFA) goals and targets *for every citizen and for every society*" (UNESCO, 2000, p. 8, emphasis added). With regard to these milestone documents, it can be concluded that inclusive education has a factual global orientation and a normative universal claim.

Artiles and Dyson (2005) reflect on inclusive education in the globalisation age and come to the conclusion that "inclusive education is both an outcome of global economic trends and itself an instrument of the globalization of educational policy and ideology" (p. 42). It is a very general debate if through globalisation people around the world become more alike, e.g., with regards to language, culture, and values (Steger, 2003). The global spread of the terminology and concept of inclusive education is described by Kalyanpur (2014) as "homogenization of such highly nuanced and complex issues [disability, inclusive education] into a monolithic paradigm dominated by western knowledge and practices" (p. 82). Le Fanu (2015) calls this process *global inclusionism*. Several commentators criticise the global inclusive education agenda as recolonisation (Grech, 2011) or international orthodoxy (Urwick & Elliott, 2010). The danger of the global spread lies in overlooking or negation of local differences and assuming that there is a one-size-fits-it-all concept for the implementation of inclusive education. Artiles and Dyson (2005) point out that inclusive education is both a local and global phenomenon at the same time. On the one hand, inclusive education became a global agenda; on the other hand, forms of inclusive educational practices "have a strongly local flavor" (p. 37).

Various scholars articulate the need to contextualise inclusive education (Miles & Singal, 2009; Mitchell, 2005a; Srivastava, Boer, & Pijl, 2013; Werning et al., 2016). Miles and Singal admonish that all educational programmes that address social and educational inequality need to be culturally and contextually appropriate (Miles & Singal, 2009, p. 2). Mitchell (2005b) concludes:

> Since there is no one model of inclusive education that suits every country's circumstances, caution must be exercised in exporting and importing a particular model. While countries can learn from each others' experiences, it is important that they give due consideration to their own social-economic-political-cultural-historical singularities. (p. 19)

The need for contextualisation makes research relevant on the question of *how* contexts mediate constructions and implementation of inclusive education. A first step in this overall research agenda can be to undertake single-country studies (e.g., Franck & Joshi, 2016; Kibria, 2005; Okkolin, Lehtomäki, & Bhalalusesa, 2010). Subsequently, a comparison of country-specific contextualisations can provide insights into patterns of characteristics across context (e.g., Biermann & Powell, 2016; Engelbrecht & Green, 2018c; Powell et al., submitted).

2.3.3 Inclusive Education in Southern Africa

Before discussing conceptions and implementations of inclusive education in southern Africa, a foundational look at education in the region in general is needed. It is beyond the scope of this work to discuss the overall role of education in the development of the individual or society. The following section outlines the very broad similarities of southern African[3] countries concerning the education sector. Of course, the educational systems of the single countries vary significantly, and overall descriptions should not be understood as homogenisation.

Indigenous education in southern Africa in the form of older members of the community passing on knowledge, skills, and values to younger ones has a tradition reaching back for centuries. The modes of transmission "include language, music, dance, oral tradition, proverbs, myths, stories, culture and religion" (Omolewa, 2007, p. 594). This way of learning formed part of daily life and did not need a specialised institution nor trained personnel. The institution of school was imported through missionaries and colonisers from the fifteenth century on (Brock & Alexiadou, 2014,

[3] In line with Hummel (submitted) southern Africa comprises in this context the SADC member states Angola, Botswana, Democratic Republic of Congo, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, Swaziland, Tanzania, Zambia, and Zimbabwe.

p. 134) and was therefore initially conceptualised to serve the purposes of colonisation. The countries of southern Africa have in common that they all share some kind of legacy of being colonialised. As a result, school systems developed in orientation to the respective system of the colonialising country. This relation manifested itself, for example, in curricula or textbooks.

The legacy of colonialism surely forms one factor in a complex set of causes for the current socio-economic conditions of the region. UN statistics categorise nine out of the fifteen countries as *low human development* (United Nations Development Programme [UNDP], 2016). This results in donor agencies (both governmental and non-governmental) influencing the receiving countries through financial and technical assistance, as well as in the education sector. Effects of this influence are discussed in (Hummel & Werning, 2016).

One characteristic of the advances in the education sector in southern Africa is the abolishing of primary school fees and the resulting enormous increase of enrollment rates (Harber, 2015[4]), supported through the Education for All agenda. However, this achievement usually did not bring an adequate increase of resources, which became visible in particular in the lack of qualified teachers, lack of school buildings, textbooks, and so on (Kalindi, 2015[5]). Consequently, the quality of education has decreased significantly, demonstrated for example in large numbers of children who drop out of school or who complete the full cycle of primary education without basic literacy and numeracy skills (Kalindi, 2015, p. 202). Many efforts have been undertaken to establish learner-centered teaching methods; however, a meta-analysis shows that teaching methods with learners being mainly limited to listening and repetition still dominate in many classrooms (Harber, 2015).

Southern Africa is in particular struck by the ongoing HIV/AIDS pandemic, the effects of which are multifaceted. The disease further contributes to the lack of teachers and other professionals and the breakdown of traditional family structures (Harber, 2015). Learners attend school irregularly or drop out completely, because they have to take over duties like caring for the sick or younger siblings and provide an income (Harber, 2015).

Just as formal schooling in itself, special education was introduced in Africa by foreign religious organisations and special educational services are even until today

[4] In this publication, southern Africa comprises Botswana, Lesotho, Madagascar, Malawi, Mozambique, Namibia, South Africa, Swaziland, and Zimbabwe.
[5] The author refers to sub-Saharan Africa, which comprises 41 countries.

provided to a large extent by churches and humanitarian organisations (Abosi, 2007[6]; Chitiyo & Chitiyo, 2007[7]; Pather & Nxumalo, 2013[8]). In a context of huge challenges for the education system in general and an enormous lack of resources, special education did not form a priority on governments' agendas until the last decade (Chitiyo & Chitiyo, 2007). The few special schools – usually with residential provision – are therefore run by charity organisations.

Bearing in mind all the named challenges of educational systems in southern Africa, the implementation of inclusive education can seem like "raising an umbrella against a storm" (Charema, 2010, p. 87[9]). However, commentators and international donor organisations argue that establishing a special school system in the South would be more cost-intensive than an inclusive system (e.g., Armstrong et al., 2010[10]). On the other hand, Wapling (2016[11]) notes that care is to be taken in using cost-effectiveness as an argument for inclusion, as there is hardly any empirical evidence that supports this argument. Kisanji (1998[12]) suggests that the absence of an established system of special schools was even conducive for the development of inclusive education.

As described above, the concept of inclusive education emerged in the North from a multifaceted critique of a separate special education system. Inclusive education was imported to the South, much like formal schooling and special education were previously. The main purpose for inclusive education in the South was to increase access to education. Scholars from both regions criticise the transfer from North to South without due consideration of contextuality and discuss whether and how inclusion is an appropriate and feasible approach for regions like southern Africa (e.g., Engelbrecht & Green, 2018a[13]; Grech, 2011[14]; Kisanji, 1998; Pather & Nxumalo, 2013; Urwick & Elliott, 2010[15]).

[6] The author refers to Africa.
[7] The authors refer to Zimbabwe, Zambia, Botswana, Namibia, Lesotho, and South Africa.
[8] The authors refer to southern Africa without exemplifying single countries. Subsequently, the authors focus on Swaziland.
[9] The author refers to sub-Saharan Africa without exemplifying countries.
[10] The authors describe this regarding developing countries without naming countries.
[11] The author refers to *low and middle income countries* and bases her definition on the UNDP Human Development Report 2014.
[12] The author refers this paper to *non-Western countries* but mainly focuses on Africa.
[13] The authors refer to SADC and present examples on Botswana, Lesotho, Malawi, Namibia, South Africa, and Zimbabwe in the edited volume.
[14] The author refers to the *non-West* and the *global South* without exemplifying single countries.
[15] The authors refer to Lesotho.

Croft (2006) argues that societies of the North have a highly individualistic orientation and thus encourage individual difference, whereas in educational systems based on a more collective orientation, individual interests and needs are subordinate to the interest of the whole group. From this perspective, treating a class of students as a homogenous group might be considered the most equitable approach. In this perspective, inclusive education conflicts with collectivism. In contrast, other voices from the region argue that the values of inclusion are particularly embedded in traditional African culture (Kisanji, 1998; Okeke, 2014[16]; Omolewa, 2007[17]; Phasha, Mahlo, & Dei, 2017[18]). Kisanji (1998) outlines the principles of indigenous African education, namely absence or limited differentiation in space, time, and status, relevance of content and methods, functionality of knowledge and skills, and community orientation. He presents how inclusion is embodied in these principles and concludes that inclusive education is a "return to the basics" (Kisanji, 1998, p. 64). Some African scholars (e.g., Okeke, van Wyk, & Phasha, 2014[19]) relate inclusive education to *ubuntu*. The Afrocentric theory of ubuntu is best expressed in its catchphrase "a person is a person through others" (Phasha, 2017, p. 4[20]). Ubuntu is therefore a paradigm of commonality and interdependence of its members. The collective orientation of belonging in the ubuntu philosophy is therefore interpreted as aligning with the principles of inclusion. The paradoxical relation between individualism and collectivism in the light of inclusion foreshadows one dimension of dilemmas, which are further discussed in section 2.4.

Describing the various ongoing developments regarding inclusion in the several southern African countries, certain tendencies and main challenges can be identified. First, the notion of inclusive education is mainly related to physical placement in mainstream education (Engelbrecht & Green, 2018b). This is described earlier as a narrow definition of inclusion. Second, the enormous lack of resources becomes visible in different facets. A lack of research funding leads to shortcomings regarding local research results (Charema, 2007). Therefore, the import of Northern theories and evidence continues and impedes southern African-developed approaches. Further flaws reflected in anything from inadequate school facilities to missing learning and teaching materials are reported frequently (Charema, 2007;

[16] The author refers to Africa.
[17] The author refers to Africa.
[18] The authors refer to Africa.
[19] The authors refer to Africa.
[20] The author refers to Africa and elaborates on South Africa as an example.

Eleweke & Rodda, 2002[21]; Pather & Nxumalo, 2013). However, it is worth mentioning remarkable examples of parents, teachers, head teachers, and communities taking over ownership and making up for a great deal of the limitations (Engelbrecht & Green, 2018b). The lack of resources is connected to the situation of professional qualification and deployment. Charema (2007) argues that training programmes for professionals like physiotherapists, speech and language therapists, audiologists, and counsellors are largely missing. Additionally, teacher education programmes are often inadequate (Eleweke & Rodda, 2002; Pather & Nxumalo, 2013). Furthermore, scholars mention an absence of enabling policy and legislation for the cause of inclusion in several countries (Charema, 2007; Eleweke & Rodda, 2002; Pather & Nxumalo, 2013). Discriminatory attitudes, which are partially grounded in traditional beliefs and held against persons with disabilities, further restrain actions towards inclusion (Pather & Nxumalo, 2013).

It is widely acknowledged that no global one-size-fits-all solution for inclusion is possible (Engelbrecht & Green, 2018b). For inclusive education to be meaningful and successful local solutions taking contextual factors like values into account need to be developed. Promising approaches of local ownership and contextualisation are reported (Caballeros, Artiles, Canto, & Perdomo, 2016[22]; Dart, Khudu-Petersen, & Mukhopadhyay, 2018[23]; Rothe, Charlie, & Moyo Chikumbutso, 2016[24]).

Several scholars identify levers for the future implementation of inclusive education in southern Africa. Understanding inclusive education in a broad sense implies a fundamental system change. In this respect, society needs to negotiate the meaning of and attitudes towards difference, diversity, and inclusion (Engelbrecht & Green, 2018b). As in change processes for inclusion in any context (Booth & Ainscow, 2016), collaborative partnerships between schools and communities – this includes parents, interest groups, the general public – are vital (Charema, 2007; Eleweke & Rodda, 2002; Srivastava et al., 2013). Both teacher education and policy and legislation are further fields of necessary intervention (Eleweke & Rodda, 2002; Pather & Nxumalo, 2013). As a specific approach for southern African contexts, Community-Based Rehabilitation (CBR) is discussed as an effective and established strategy which can be expanded and connected to the implementation of inclusive education, particularly in rural areas. CBR is an approach developed by WHO in the

[21] The authors refer to *developing countries* without specifying the countries.
[22] The authors refer to Guatemala.
[23] The authors refer to Botswana.
[24] The authors refer to Malawi.

late 1970s in order to “improve access to rehabilitation services for people with disabilities in low-income and middle-income countries, by making optimum use of local resources” (World Health Organization [WHO], 2010, p. 1). An essential principle of CBR is the involvement of and implementation through the members of the immediate community. Charema (2007) concludes that “if inclusive education was to be implemented in the way of CBR, families and members of the community could be trained and then be fully involved in supporting community schools that run inclusion programs” (p. 93). In addition, Eleweke and Rodda (2002) point out that

> if adequately planned and implemented CBR could facilitate the tackling of many of the challenges of IE [inclusive education] in DCs [developing countries]. There is, however, no ‘quick fix’ in the development and implementation of appropriate CBR programmes. Each country must, through reforms in the education system, discover what works *best* for it. (p. 122, emphasis in original)

In summary, challenges for education systems in southern Africa are enormous; however, notable improvements have been achieved over the past decades. In the light of these challenges, the situation of learners with special needs only received marginal attention. Southern African countries, just like other countries of the South, have often taken over the concept of inclusive education without a context-appropriate adaptation. Nevertheless, African commentators argue that the principles of inclusive education align well with traditional African orientations. With CBR, experience gained through community-based change processes shows the potential to be linked to the implementation of inclusive education in southern African contexts. Some scholars consider the fact that no extensive government system of special schools is established as conducive condition to create an inclusive system.

2.4 Theorising Inclusive Education

It is widely acknowledged that no coherent theory of inclusive education exists and that the concept of inclusion is informed by a variety of different theoretical approaches, assumptions, and principles (Clark, Dyson, Millward, & Robson, 1999; Slee, 2011; Boger, 2017). Several different theoretical approaches are applied, which contributes to the variety of definitions developed over time. This section commences with reflections on difference, as it is only through constructions of difference that inclusion becomes a meaningful concept. It then goes on to portray briefly some theoretical perspectives on inclusive education and to introduce the hereby-applied approaches of social constructivist and dilemmatic perspectives. Lastly, the definition of inclusive education that informs both the *Research for Inclusive Education in International Cooperation* (Refie, see section 5.1) project and this research is presented and debated in light of the theoretical approaches.

Generally speaking, inclusion (not only in the education sector) can be considered as resulting from perceived differences among human beings. Section 4.1 elaborates on social comparison as an essential human urge (Festinger, 1954; Mau, 2017). Comparison is only possible through the definition of a *tertium comparationis* (Prengel, 2001). Hence, the criterion for differentiation builds the category of difference. Differentiating, building categories, and categorising themselves and others is a necessary strategy of people to reduce complexity of the environment. According to West and Fenstermaker (1995) difference is an “ongoing interactional accomplishment” (p. 9).

Not every category of difference leads to inequality; these are described as horizontal differences (Lutz & Wenning, 2001). Vertical differences categorise humans hierarchically and assign higher or lower value to members of the respective group. The categories of difference are usually binary in structure, e.g., disabled/non-disabled, male/female, resident/foreigner, Black/White. These absolute binaries ignore nuances in between that are apparent in each category. These binaries of human difference appear to be complementary, but are in fact hierarchical. One side is declared as norm, the other side as abnormal and therefore inferior (Katzenbach, 2015; Lutz & Wenning, 2001). Hence, the mentioned examples are vertical differences, even though they are not obviously declared so.

Central questions in light of inclusion are: What is difference? How is it created? How is difference dealt with? Why do some categories of difference lead to discrimination and exclusion and others don’t?

These questions can be debated and examined from different theoretical perspectives. In the following, some major possible approaches are described:

- A system theoretical approach (Luhmann, 1994) focuses on the differentiation of a social system and its environment. Social systems can be regarded at the interactional and the organisational level (Werning, 2003). In this perspective, it becomes relevant to ask: Who is part or not part of a certain organisational and/or interactive system?
- In the social constructivist perspective, categories of difference are considered as socially constructed. The slogan *Doing Difference* (West & Fenstermaker, 1995) describes this process of constructing differences. Constructivist perspectives focus on the processes of constructing differences and the social aspects in these processes. Whether a certain category of difference is rated as vertical or horizontal difference and therefore leads to inequality, discrimination, and exclusion depends on the specific socio-economic context and can change over time. Inclusion in this perspective is an answer to the effects of social constructions of difference.
- Conflict theories reach back to Marx and address unequal distribution of resources and power in society (Allan, 2007, p. 213). A wide range of conflict theories look at how power is exercised and how the interest of specific groups or individuals are imposed. Concerning inclusive education, conflict perspectives focus on the reflection of societal issues in the educational system. Conflict theorists look at how vertical differences are reinforced through the education system in general and through the perpetuation of a segregated special education system in particular.
- Intersectionality (Crenshaw, 2017; Winker & Degele, 2010) focuses on several dimensions of difference, their interaction, and the results of these interactions. This approach builds on conflict theories and asks how several categories of difference intersect and (re)produce inequalities. In doing so, intersectionality addresses systems and processes that produce and reproduce inequalities. Addressing the educational system, intersectional approaches intend to reveal and debate how the attribution of several categories of difference result in multidimensional disadvantage for certain learners.
- The dilemmatic approach addresses tensions, dilemmas, and contradictions which are described by several commentators with regards to inclusion (Boger, 2017; Ferdman, 2017), education (Helsper, 2004; Judge, 1981), or

inclusive education (Michailakis & Reich, 2009; Norwich, 2013). A dilemma in this understanding is a situation arising from tensions with two alternatives for action, where choosing either of the alternatives has both positive and negative effects. Norwich (2008) notes that all dilemmas of inclusion are grounded in one basic dilemma of difference: Does inclusion mean to recognise and respond to individual differences and therefore to emphasise differences? Or should inclusion stand for treating all people the same and stress commonality? The question whether inclusion reduces or intends to eliminate categories of difference, or whether inclusion reinforces categories of difference, is a conflicting subject of discussion among inclusion scholars (e.g., Dederich, 2016; Hinz & Köpfer, 2016). This differentiation-commonality-dilemma is reflected in several dimensions of inclusive education such as identification, curriculum, and placement decisions (Norwich, 2008). The publication Hummel and Werning (2016) addresses tensions in inclusive education in countries of the South. Its heading "same same but different" reflects the differentiation-commonality-dilemma.

I apply a combination of a social constructivist perspective and dilemmatic perspective on inclusive education to this research. As the social constructivist approach considers difference constructed within a specific historical and socio-economic context and allows us to understand differing constructions, it is of particular value for this work, because it intends to deepen the understanding of different constructions in situated contexts. Many stakeholders who implement inclusive education find themselves in dilemmas that seem unsolvable. No general decision towards one or the other alternative can be taken, instead stakeholders constantly have to tare both sides balancing the positive and negative effects of each side. For this reason, the dilemmatic perspective helps to understand the challenging situations of stakeholders and acknowledges that there is no easy way out. The combination of these two perspectives intends to accommodate the complexity of the research object.

As it is one intention of this work to investigate how inclusive education is constructed, both this research and the underlying Refie research project are based on a broad definition of inclusive education. With this definition, a limitation in focus on a certain group – or a certain category of difference – is avoided. Based on Artiles, Kozleski, Dorn, and Christensen (2006) and Kalambouka, Farrell, Dyson, and Kaplan (2005) the hereby-applied definition covers the following four dimensions:

- Access to/Presence in mainstream education of all learners
- Acceptance of all learners by teachers, school staff and other learners
- Participation in all activities of the school life
- Achievement in academic development of each learner

In this definition of inclusive education, another dilemma is inherent. The first three dimensions refer to social participation, dignity, and respect and carry therefore a value-driven, normative orientation. These three dimensions relate to the rights and ethics discourse (Dyson, 1999). The last dimension is evidence-oriented as it addresses the individual dimension of effective learning support. In Dyson's categorisation of inclusion discourses, this dimension emerges from the efficacy discourse (1999). Considering these four dimensions as elements of inclusion, a tension between the orientation towards values and an orientation towards learning achievement can arise in many different situations in education. Practitioners find themselves in situations where they have to decide whether to favour the focus on the implementation of values that goes hand in hand with social and emotional learning processes, or to create the most effective learning environment for academic development. My approach in this research acknowledges a fundamental dilemma within the understanding of inclusion.

Negotiations of the meaning of inclusive education and the implementation happen on all levels of the education system, reaching from the individual, to classroom, to school, to local, to regional, to national, to international level (Bray & Thomas, 1995). Consequently, both the Refie project and this research apply a multilevel perspective in analysing inclusive education. Section 4.2 describes the model of multilevel analysis suggested by Bray and Thomas (1995) for studies in the field of Comparative and International Education and outlines on which levels each publication focuses.

After outlining the historical and terminological developments, describing the context for inclusive education in southern Africa, and exploring the theoretical complexities in this chapter, the following chapter turns to research on inclusive education. It describes the challenges for research resulting from these terminological and theoretical ambiguities and explores how inclusive education is constructed through research.

3 Research on Inclusive Education

Taking existing research evidence into account is fundamental for every empiric study. Some reviews of inclusion studies attempted to provide an overview of existing research findings regarding inclusive education and, in doing so, map out theoretical and methodological challenges of inclusive education research. Instead of reviewing and presenting the evidence base in this chapter, the first section discusses reflections and conclusions on inclusive education research by scholars who undertook reviews on the topic. Based on the assumptions of a constructivist methodology, the research object is not only defined theoretically, but research itself constitutes the research object in a reciprocal process (Flick, 1999, p. 637). Hence, the second section reflects on the question of how research on inclusive education constructs inclusive education.

3.1 Annotations on the Theoretical and Empirical Conceptualisation of Inclusive Education

This section initially turns to reviews on inclusive education from the North (mainly USA and UK). Even though setting the North as starting point or benchmark is the opposite to my position, it feels necessary to demonstrate the methodological and methodological challenges from scholars of this region, as it has a longer tradition in inclusive education and therefore in inclusive education research.

Three major reviews of empirical research on inclusive education were undertaken over the past fifteen years in the North (Artiles et al., 2006; Dyson, Howes, & Roberts, 2002; Göransson & Nilholm, 2014).

Dyson, Howes, and Roberts (2002) investigated the empirical evidence that exists on how schools can become more inclusive at a time when inclusive education was still a young field. The authors focused on studies from the United Kingdom, but also included English-language literature from other countries. Even though there was no shortage of studies on inclusive education, the reviewers identified only a few that tested inclusion in schools against explicit criteria or traced the impacts on students. The empirical studies were lacking methodologically sound research designs and were weak on outcomes but rather descriptive in nature. Dyson (2014) concludes at a later stage that inclusion cannot be studied in the same way as practices or interventions, which can be specified more clearly. Measuring relations between interventions under the scope of inclusion and their effects is highly complex from his point of view. However, the

question of how to research relations between inclusive schooling and its effects is also left unanswered by him.

The review undertaken by Artiles, Kozleski, Dorn, and Christensen (2006) does not state a clear regional focus, but stresses that most of the available research stems from the United States and United Kingdom. The authors confirm the conclusions of the previous review in general and conclude that the reviewed studies present an emerging knowledge base with “significant gaps and limitations . . . in the conceptual and methodological bases of this research” (Artiles et al., 2006, p. 79). In particular, the authors criticise a lack of understanding of the complexities of inclusive education. The reviewers state that the conceptual ambiguity of inclusive education hampers establishing a coherent knowledge base. Whereas the theorisation of inclusion lately became further nuanced and complex, inclusive education research is lagging behind by being mainly descriptive and focusing students with disabilities.

The most recent review of Göransson and Nilholm (2014) aimed at investigating what definitions of inclusive education are used in inclusive education research and what empirical results are available regarding the implementation. The authors make no statement regarding the regional scope of their review; the list of references indicates that all reviewed studies are English-language. Again, the authors claim that it was difficult to find studies covering a process over time and measuring social and academic outcomes of students. The results of the review undertaken made the authors feel “quite uneasy” (p. 276) with the discordant relationship between abundant advice on how to make classrooms inclusive communities versus the lack of empirical evidence on how to successfully do so. The lack of sound empirical evidence is especially remarkable as “research is referenced as if such connections have been established” (p. 276). In line with the previous reviews, the authors conclude that more research is needed to test claims against empirical evidence regarding inclusive education in schools.

D'Alessio and Watkins (2009) also discuss the challenges inherent of researching inclusive education and comparing the evidence across the globe. The multiple meanings of inclusion lead to a lack of terminological, conceptual, and linguistic clarity and restrain comparability of results across contexts, in particular across countries. The comparison of statistics on inclusion/exclusion or persons with disabilities or special needs is especially problematic, as these definitions vary in different countries. The authors conclude that research on inclusive education requires “continuous conceptual re-definition depending on the context and the actors involved” (p. 245).

The hereby briefly outlined conclusions from reviews and the connected discourses on inclusive education research demonstrate specific challenges connected to research on inclusive education and several difficulties regarding the comparison of empirical results in this field of research. Turning to empirical knowledge regarding inclusive education in southern Africa, these theoretical and methodological challenges again become visible. Furthermore, it needs to be kept in mind that the history of inclusive education and inclusive education research is younger compared to the North and that the general lack of resources becomes visible in scientific infrastructure in southern Africa. It is therefore not surprising that many research activities on the topic are embedded in a North-South cooperation. Many single studies exist focusing on one particular aspect in one country or a region within a country, e.g., factors influencing school attendance of children with disabilities in Zimbabwe (Nyikahadzoi, Chikwaiwa, & Mtetwa, 2013), teachers' understanding of curriculum adaptations for learners with learning difficulties in Botswana (Otukile-Mongwaketse, Mangope, & Kuyini, 2016), the situation of girls with regards to educational opportunities in Malawi (Sankhulani, 2007), or perceptions of the impact of AIDS on access to and quality of education in Zambia (Robson & Kanyanta, 2007). These single studies all examine a particular facet of the complex phenomenon of inclusion and contribute to establishing a common knowledge base. However, trying to accumulate this body of research leads to the above-mentioned pitfalls of terminological and conceptual ambiguity.

Two major literature reviews intend to collate empirical results regarding the implementation of inclusion in the South.

Srivastava, Boer, and Pijl (2013) reviewed eleven publications, both academic studies and reports from international organisations, in order to examine what projects have been undertaken to include children with disabilities in education in developing countries[25] and what effects of these projects can be measured. The authors state that few studies on projects exist and most are small in scale. The limited body of research in general and on effects of interventions in particular is concerning.

On behalf of an international non-governmental organisation, Wapling (2016) reviewed the literature on children with disabilities in inclusive education in low and middle income countries[26]. The author analyses what approaches are used to increase access to education and improve academic outcomes of learners with disabilities, and how

[25] Terminology used by the authors
[26] Terminology used by the author

these approaches are evaluated. Overall, this study confirms a significant gap in the literature, as only one out of the 131 publications investigated educational outcomes.

The fact that the two reviews on inclusive education in the South both focus on children and youth with disabilities, and do not include other categories of difference, can be interpreted in two ways. Using a definition of inclusion that focuses on disability might be rooted in the attempt to reduce the complexity of the topic under study compared to applying a broader definition of inclusion. On the other hand, this can be regarded as an indicator for the prevalent understanding of inclusive education in the South.

The conclusions of the reviews stress that inclusive education is a highly complex phenomenon and that empirical research needs to acknowledge and tackle these complexities. The complexities arise from a lack of clarity and consistency in the concept of inclusion and the necessity of contextualisation. Therefore, several forms of inclusions exist and their effects are hard to compare. The concept of inclusion is broad and complex; hence, researching this phenomenon is complex. In the current research discourse, there is no conclusive answer on how these complexities can be tackled in theoretical and methodological ways. Research can therefore only select aspects of the overall complex phenomenon and focus on, e.g., specific dimensions of difference (section 2.4), specific dimensions of inclusion (section 2.4), or specific levels in the education system (section 4.2). This should not be interpreted as deficient, but as feasible way to take up the existing challenges in the field.

This work intends to take account of these inherent complexities of the research object. It therefore applies a multiperspective, multilevel design (section 5.1). Furthermore, different theoretical approaches and methods are applied in the single publications of this work and specific sub-topics are addressed, such as teacher education (chapter 6). In addition, this work attempts to take due consideration of these complexities in the research design, however, not all aspects can be included sufficiently at the same time. Neither the Refie project nor this work investigates the dimension of learning outcomes (see section 2.4), as this would result in an additional methodological approach beyond the scope of this work.

It is for these reasons, that I consider it of major importance to develop detailed descriptions of the various and potentially conflicting constructions of inclusive education. Such a thorough understanding is necessary to analyse the implementation of inclusive education in specific contexts. The general objective of this work is therefore to advance the understanding of various constructions of inclusive education and situated implementation.

3.2 Constructing Inclusive Education Through Research

The intention of this section is to analyse research on inclusive education in southern Africa through drawing on the data corpus and the results of the analysis in Hummel (submitted). This paper outlined the main strands of the academic discourses on inclusive education in southern Africa by applying a Sociology of Knowledge Approach to Discourse according to Keller (2016). Particularly, it analyses the rationale and definitions of inclusive education in the described discourses. This data corpus consists of 66 publications, of which 48 are empirical. These 48 studies are now used to explore empirical research on inclusive education in the region. It is not the intention of this analysis to review the empirical results in a meta-analysis, but to examine what research on inclusive education investigates. This is possible as one criterion in the process of establishing the corpus was that the publication has *inclusive* or *inclusion* as keywords. Hence, the authors themselves declared their publication as part of inclusive education research. By drawing on the results regarding the definitions of inclusive education, published in Hummel (submitted), and through looking at the empirical studies and exploring what is investigated, it is possible to see how scholars from southern Africa define inclusive education through their research.

The institutional affiliation of authors out of the 66 articles that form the final corpus for the analysis (Hummel, submitted) is distributed as follows: South Africa (47), Botswana (7), Zimbabwe (4), Swaziland (2), Zambia (2), Lesotho (1), Malawi (1), Namibia (1), and Tanzania (1). With the search criteria (see Hummel, submitted), no publications were found with authors with an institutional affiliation in Angola, Democratic Republic of Congo, Madagascar, Mauritius, Mozambique, or Seychelles.

Regarding the definitions of inclusive education, a considerable difference exists between publications from South Africa and the other southern African countries. In the first, mostly a broad definition of inclusion (Ainscow et al., 2006; see also section 2.3.1) is applied (Hummel, submitted). Based on the terminology in South African policy documents (e.g., Department of Education, 2001), the definitions in these publications focus on all learners in their individuality and barriers to learning within the educational system. The definitions used in the publications of other southern African countries, in contrast, vary widely and range from a concern of children with disabilities or special educational needs (e.g., Kuyini & Mangope, 2011) to all vulnerable learners (e.g., Hapanyengwi-Chemhuru, 2013) to all learners (e.g., Mudyahoto & Dakwa, 2012).

Several authors name groups at risk of exclusion from education (e.g., Gous, Eloff, & Moen, 2014; Hapanyengwi-Chemhuru, 2013; Mitchell, Lange, & Thuy, 2008).

Vulnerability due to being homeless, displaced, or affected by HIV and AIDS is of particular importance in southern African countries. In addressing specific vulnerable groups, a clear contextualisation to the conditions of southern African countries becomes visible in the analysed publications. Again, a difference between South Africa and the other countries emerges: scholars from the other countries emphasise the category of difference ability/disability more often than South African scholars.

Debating inclusive education, some publications do not name any specific group (e.g., Du Toit & Forlin, 2009; Ntombela, 2011); others stress that they cover all learners who experience barriers in learning (e.g., Geldenhuys & Wevers, 2013; Walton, 2013). If a certain group is addressed by a specific study, it is either learners with disabilities in general (e.g., Mudyahoto & Dakwa, 2012), learners with a specific form of disability (e.g., Bornman & Donohue, 2013) or learners with special educational needs (e.g., Mukhopadhyay, 2014). None of these publications from the field of inclusive education research focuses on ethnicity, language, gender, or HIV/AIDS. Studies on these topics exist (see section 3.1), but the authors do not label them with the key words *inclusive/inclusion* and therefore do not consider them part of inclusive education research.

Looking at the study participants of the 48 empirical studies (figure 1), it becomes obvious that a high concentration of the available research focuses on the individual school level. In-service teachers form the largest group of participants, represented in 30 out of the 48 empirical studies. This group is followed by learners, parents, and principals/head teachers. Only a few studies cover research topics concerning other levels of the education system.

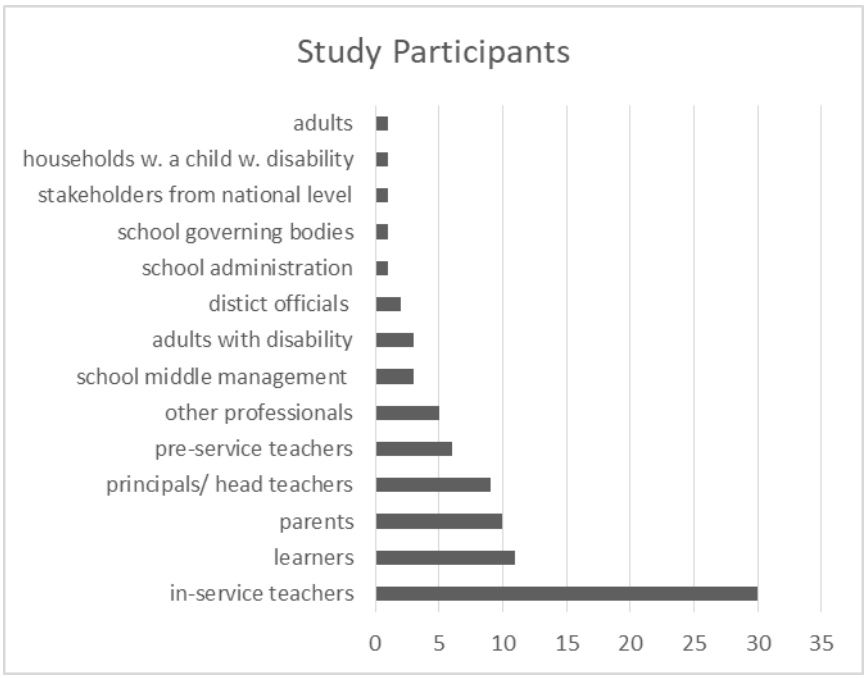

Figure 1: Study participants of the analysed empirical studies

In the empiric research of southern African scholars, several main themes emerge:

- Various studies investigate attitudes towards inclusive education. Eight studies explore attitudes of teachers or pre-service teachers (e.g., Donohue & Bornman, 2015; Kuyini & Mangope, 2011; Mdikana, Ntshangase, & Mayekiso, 2007). One case studies the attitudes towards difference and inclusion of learners (Walton, 2013).
- The understanding of inclusive education by different stakeholders in specific contexts is another topic covered by some studies (e.g., Gous et al., 2014; Meltz, Herman, & Pillay, 2014).
- Perceptions of the implementation of inclusive education from students, teachers, principals, parents, and school governing bodies form another object frequently under study (e.g., Engelbrecht, Oswald, & Forlin, 2006; Kaplan, Lewis, & Mumba, 2007).
- Another main strand of research is the development of inclusive schools and inclusive classroom practices. These studies focus on the implementation of inclusion and explore, e.g., what support teachers offer to learners who experience barriers in learning (Engelbrecht, Nel, Nel, & Tlale, 2015), how teachers adapt the curriculum in the classrooms (Otukile-Mongwaketse et al., 2016), and what processes support or challenge the inclusion of learners in mainstream schools (Ngcobo & Muthukrishna, 2011).

In summary, to a certain extent inclusive education research in southern Africa is still rooted in a traditional notion of including learners with disabilities. At the same time, a significant amount of research understands inclusion in a broad sense. Especially in South Africa, a commonly shared definition is established that focuses on all learners. In general, the meaning of inclusion is debated and negotiated – just like in the North (Göransson & Nilholm, 2014). Inclusive education research in southern Africa currently has a strong focus on the school level. The perspectives of teachers especially are in the centre of many studies. Hence, teachers are identified as key actors in the implementation of inclusive education. Other levels and forces outside of the school, such as community support, cultural influences, resource allocation, policy and legislation also have strong influences on the development of inclusive communities and are therefore relevant research objects in this field.

The specific focus of this work, which was outlined in chapter 2 and 3, makes it necessary to position my work in the field of Comparative and International Education in chapter 4. The debates and key characteristics of the field have effects on the research design that is presented in chapter 5.

4 Positioning Within the Field: Comparative and International Education

It is the purpose of this chapter to position my research within the field of Comparative and International Education. However, it is not the intention to provide a comprehensive overview of the field. This would imply looking at different positions regarding the self-conception of the field, including its various theoretical and methodological approaches, and different determinations of the object(s) of the field. The first section merely outlines the major characteristics of this particular field and focuses on presenting how these aspects influence my own research. The second section presents key characteristics of the field and how they are reflected in this work.

4.1 Introduction to the Field

The first conceptualisation of Comparative Education[27] – the initial name of the field – dates back to the early nineteenth century. Jullien de Paris called for the comparison of schools across Europe and an international exchange of experiences for the purpose of learning from others, interestingly enough at a time where national education systems were just about to emerge (Adick, 2008). The initial motivation of learning from experiences elsewhere still forms today the core subject matter of the field. As the first national and international scientific societies evolved, they carried the pivotal term *comparative* in their name. In the meantime, *international* also found its way into the self-descriptions of most of those societies (Adick, 2008). This twofold orientation in the present description of the field Comparative and International Education complicates aspirations of defining the field.

Among the actors of the field, Comparative and International Education is generally not perceived as a clearly contoured scientific discipline but rather a pluridisciplinary field of research and teaching (Parreira do Amaral & Amos, 2015, p. 7). Cowen and Kazamias (2009) even argue that "several comparative educations can be identified, both at any one particular time and over time" (p. 4). Many commentators agree that it forms a particular strength of the field to be pluridisciplinary and to be characterised by diversity and openness regarding methodological approaches, theoretical frameworks, and disciplinary identities (Parreira do Amaral & Amos, 2015, p. 8).

[27] *Education* in this context describes both *Erziehung/Bildung* and *Erziehungswissenschaft* in the German understanding (Amos, 2015).

To compare is an essential part of human perception and categorising of perceptions. According to Festinger (1954), there is a drive within every human to compare him-/herself with others. Mau (2017) argues that we are currently living in a global society of permanent comparison expressed through an increasing quantification of the social sphere. Furthermore, comparison as a means of analysis is implicitly or explicitly a fundamental principle of most scientific investigations. A truism in the perspective of comparative research is that thinking without comparison is unthinkable (Parreira do Amaral, 2015, p. 107). Transferred to education research, Comparative Education can – in a rather broad and overarching definition – therefore be understood as "the study of any aspects of educational phenomena in two or more different national or regional settings in which attempts are made to draw conclusions from a systematic comparison of the phenomena in question" (Phillips & Schweisfurth, 2014, p. 23). Adick (2008) argues that Comparative Education (she included international education in this concept) can be condensed as having otherness which is marked through natio-ethno-cultural differences[28] as its object.

Combined under one umbrella, Comparative Education and International Education are often described as twin fields that have merged (Crossley & Watson, 2006). "It is not always possible to tell where one ends and the other begins, and they are highly complementary" (Phillips & Schweisfurth, 2014, p. 53). Especially in the Anglophone tradition, the strand of International Education is assumed to be more applied and action-oriented than the more theoretical orientated Comparative Education (Crossley, 2001, p. 51).

Phillips and Schweisfurth (2014) list different aspects of International Education that can be categorised as concerning the research object and the researcher's/researchers' perspective. International Education on the one hand comprises studies on internationalisation of education. The Bologna Process can be named as one example for such a process (Phillips & Schweisfurth, 2014, p. 55), which forms in many different aspects the research object in International Education. Furthermore, international schools such as German Schools Abroad and international certifications such as the International Baccalaureate can pose areas of research interest in this field, and the analysis of international education frameworks such as the Education for All agenda. According to Phillips and Schweisfurth (2014) Education and Development Studies is a

[28] With reference to section 2.2 it needs to be stressed that these alterities need to be considered as constructions in my research context.

distinct sub-area that is concerned with researching various aspects of education in developing[29] countries.

Another aspect of International Education refers to the perspective researchers are taking. The focus of insider-outsider research is to look at the relationship between the researcher's background (especially in national and cultural aspects) and the cultural or regional area the research object is located (Crossley, Arthur, & McNess, 2016). An outsider perspective is present when a researcher from one national or cultural background is conducting a study in a different context.

The demarcation between the concepts internationalisation, transnationalisation, supranationalisation, globalisation as illustrated in section 2.1 is not reflected in the description of the field. International Education comprises all previously mentioned aspects without explicitly mentioning each of them.

Through these examples it becomes evident why "a comparative study is usually (though not exclusively) international in nature, and an international study is often comparative (though not necessarily or explicitly so)" (Phillips & Schweisfurth, 2014, p. 7). Mitter (1997) argues that in fact, Jullien de Paris included both the international and the comparative perspectives as constituting components in his programmatic publication *éducation comparée*.

The hereby-presented research positions itself predominantly in the area of International Education. The overall research object is the understanding, development and implementation of inclusive education in different contexts. The influence of global frameworks such as the Salamanca Statement and the United Nations Convention on the Rights of Persons with Disabilities and international discourses on national (Hummel et al., 2016; Hummel, 2016; Hummel & Engelbrecht, 2018; Hummel & Werning, 2016) or regional (Hummel, submitted) contexts forms a central analytical focus of this research. As this research explicitly looks at inclusive education processes in Malawi and Guatemala, it can be ascribed to the sub-field of Education and Development Studies.

Besides the research object being international, the research process also carries certain international aspects. The empirical data stems from the Refie project (see section 5.1). This project was conducted by an international team with members from different countries spanning several continents. Members from the two study countries and members from other countries comprise the overall team of researchers. Therefore, the

[29] For further reflections on the term *developing* see section 2.1. I am using the term *developing countries* here as it is the term used by Philips and Schweisfurth (2014, p. 64).

research project carries both insider and outsider perspectives. As characteristic for the field of International Education, some publications have an implicit comparative approach in addition to the international perspective (e.g., Hummel & Werning, 2016).

4.2 Key Characteristics of the Field and Their Relevance to This Research

The Relevance of Context

A key concept in Comparative and International Education is context. Scholars in the field take it as axiomatic that an education system can only be analysed with consideration of the context (Crossley & Watson, 2006; Steiner-Khamsi, 2015). "'Context' here can refer to the national context, but regional, local and institutional contexts may be equally important, as these may vary considerably within countries" (Phillips & Schweisfurth, 2014, p. 66). Contexts like culture, society, history, and language are used in the field as variables to explain differences between phenomena. These contexts are not to be considered fixed, but in constant mutation, influenced in particular by processes subsumed under the term *globalisation*. Dale (2015) describes how globalisation is affecting and transforming these existing contexts and therefore considers globalisation as context of the contexts.

In this respect, we outlined the socio-economic and historical contexts as relevant elements in the publications (Hummel, 2016; Hummel et al., 2016; Hummel & Engelbrecht, 2018; Hummel & Werning, 2016).

The Necessity to Look Beyond the Nation State

This methodological orientation problematises the concentration on nation states as the major unit of analysis in international and comparative studies. An interweaving of several levels and the analysis of relations between these levels is increasingly called for by scholars in the field (e.g., Phillips & Schweisfurth, 2014; Steiner-Khamsi, 2015). Bray and Thomas (1995) define seven levels, namely individual, classroom, school, local, regional, national, and international level. This categorisation is simplified, as intermediate levels could also be identified. They argue that many studies either focus on the national and international level or on school level and below. Both approaches lead to "unbalanced and incomplete perspectives" (Bray and Thomas, 1995, p. 472) as they lack a multilevel perspective. Hence, they introduce the framework for multilevel analyses in this methodological discourse. Each perspective on one or more levels creates different insights and is relevant for the overall analysis of, for example, the

complex phenomenon of inclusion. However, as the scholars state, too many studies in the field of Comparative and International Education lack a multilevel approach.

The hereby-presented research strives to apply this multilevel, multifocal perspective. The multilevel approach with regards to geographic levels was already embedded in the Refie (Research for Inclusive Education in International Cooperation, see section 5.1) research design and resulted in data collection at national, district, and school levels. The publications Hummel, Engelbrecht, and Werning (2016) and Hummel and Werning (2016) present an analysis of inclusive education from school to international level. The educational governance theoretical approach provides in particular a useful analytical lens for such multilevel analyses, e.g., through the concept of recontextualisation (Fend, 2008). Hummel (2016) applies this approach to analyse the recontextualisation of inclusive education from global to national to regional to local level in Malawi. Different perspectives form the research object in the respective publications, e.g., academic discourses (Hummel, submitted) and the teacher education sector (Hummel & Engelbrecht, 2018).

Research in a North-South Relation

Research in a North-South relation has to take legacies of colonialism, exploitation, and dependency and their continuing effects into account, which results in specific methodological, theoretical, and ethical considerations. On the concept of disability, Grech (2011) and Singal (2010) point out how this conceptual understanding has been constructed and framed in the North and has been transferred almost unquestioned to other contexts. Both call for a deconstruction of this particular concept and an intellectual decolonisation in general. This example shows how theoretical tenets and their implications need to be critically examined before application in a different context. A related concern in the transfer of concepts is language. “It is known that concepts do not always exist across cultures and languages” (Hsin-Chun Tsai et al., 2004, p. 22). Cross-language research often has to rely on translation of texts. As qualitative research in particular is based on language and communication, the act of translation is more than merely technical. Translators in a research project therefore become *active producers of knowledge* (Hennink, 2008) and this role needs to be acknowledged accordingly. In order to reduce linguistic, cultural, and other contextual barriers, *cultural brokers* (Liamputtong, 2008) can contribute significantly to research processes and outcomes by providing contextual insights and enabling access to study participants. In the context of cross-cultural education research, which confronts deeply ingrained cultural concepts, the transcultural knowledge of translators is even more relevant.

Diversity in terms of cultural and linguistic backgrounds was one vital aspect in the composition of the research teams in Malawi and Guatemala in the Refie project. It was a priority to include cultural brokers already from the beginning in the initial team structure. During the phase of data collection, the project additionally involved cultural brokers for some areas of the case study schools. This showed to be of vital importance as these persons from the respective communities created access to certain interest groups, put phenomena into context, and also proved to be an important support in organisational and logistical matters.

A focus on power relations and their implications on ethical questions is a necessary consideration in both North–South and researcher–research subjects (Tikly & Bond, 2013). According to Foucault (1980), power relations are everywhere and "production of knowledge is also a claim for power" (Ball, 2013, p. 13). Any research process that commences is therefore already situated in a complex set of power relations. As it is the aim of research to produce and disseminate knowledge, research can exercise power and, for example, reinforce – even unintentionally – existing power relations. This requires all researchers in general and researchers in any form of North-South relation in particular to have a reflexive attitude in all stages of the process. "Reflexivity demands steady, uncomfortable assessment about the interpersonal and interstitial knowledge-producing dynamics of qualitative research, in particular, acute awareness as to what unrecognised elements in the researchers' background contribute" (Olesen, 2018, p. 160).

Several meetings of the Refie team members during the course of the project created opportunities for intense discussions on the project setup and reflections on ethical questions. Nevertheless, power imbalances are inherent in such a project structure, as those between, for example, financing institutions and implementing institutions, team leaders and team members, team members from the study countries and team members from other countries. Even though a reflective research practice is of crucial importance for projects like this one, it would be naïve to believe that power dynamics based on historical legacies can easily be dissolved.

Becoming aware and reflecting on one's own contributing background and especially resulting privileges leads to the notion of positionality. "Positionality is thus determined by where one stands in relation to 'the other'" (Merriam et al., 2001, p. 411). Using this perspective overcomes the strict insider-outsider binary (see section 4.1) and positions the researcher as relatively inside or outside with respect to a complex set of status variables (Merriam et al., 2001). To include a statement of positionality especially

became meaningful in the publication Hummel (submitted). This publication analyses the academic discourses on inclusion in southern Africa and it was of particular importance to reflect on the impact of my personal background in this analysis.

Narayan (1993) stresses that to

> acknowledge particular and personal location is to admit the limits of one's purview from these positions. It is also to undermine the notion of objectivity, because from particular locations all understanding becomes subjectively based and forged through interactions within fields of power relations. (p. 679)

In this understanding, this work avoids any presumption of impartiality and instead recognises that research findings can never claim to be *true* or *only true*, but need to be regarded in the light of "wider questions around the construction of knowledge" (Robinson-Pant & Singal, 2013, p. 459; see section 2.2).

5 Research Design

This dissertation originates mainly from the international research project *Research for Inclusive Education in International Cooperation (Refie),* which was conducted between 12/2013 and 02/2015 in Guatemala, Central America and Malawi, southern Africa. The first section briefly presents this research project and points out how the single publications emerged from this project. The development process of the single publications can be considered a hermeneutic circle. The second section presents the overall research questions and how they relate to the specific questions in the publications. As research itself is a construction process, the third section describes to what degree of knowledge construction the overall research questions refer. The last section presents the overall methodological approach of the study and examines aspects regarding the relationship of theoretical and empirical considerations.

5.1 Embedding Within Refie Research Project

The Refie project was mandated by Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and funded by the German Federal Ministry for Economic Cooperation and Development (BMZ). Leibniz University Hannover and GOPA Consultants were responsible for the implementation of the research project[30].

The applied research project aimed "to advance our understanding about the development of inclusive educational systems in developing countries in order to improve inclusive policy and practice in technical cooperation" (Research for Inclusive Education in International Cooperation [Refie], 2014, p. 4). The applied research perspective aimed to show whether, where, and how changes in educational systems can be stimulated.

The overall research questions of the project were:

- "How is the concept of inclusive education constructed at the different levels (macro, meso, micro) from various perspectives in Guatemala and Malawi?
- Which success factors of and barriers to inclusive educational systems can be identified in order to draw conclusions for further developing countries?" (Refie, 2015, p. 12)

[30] Members of the research team Guatemala: Marta Caballeros, Héctor Canto, Magaly Menéndez, Cristina Perdomo, Gerson Sontay. Members of the research team Malawi: Dr. Grace Mwinimudzi Chiuye, Anderson Chikumbutso Moyo, Evance Charlie, Dr. Elizabeth Tikondwe Kamchedzera, Lizzie Chiwaula. International researchers: Prof. Dr. Rolf Werning, Myriam Hummel, Prof. Alfredo Artiles, Prof. Petra Engelbrecht, Antje Rothe.

The specific research questions were structured on the basis of the first three of the four dimensions of inclusion, namely access (also called presence), acceptance, participation, and learning achievement (Artiles et al., 2006; Kalambouka et al., 2005).

National teams of researchers in both countries were in charge of data collection and preliminary data analysis. Due to the multilevel and multiperspective approach of the study, data was collected on the national, district, school, and community level. Relevant stakeholders in the education sector like policy makers, representatives of nongovernmental organisations, academics, education administrators, head teachers, teachers, students, parents, and members from various communities within each country were interviewed through problem-centered interviews (Witzel & Reiter, 2012) or focus group discussions (Lamnek, 2005). Furthermore, participatory observations (Lamnek, 1995) of lessons were conducted at primary schools. Additionally, a document analysis (Wolff, 2015) of existing research results, policy papers, and practice papers was conducted for each study country (Refie, 2015). The transcribed data was analysed with open (Strauss, 1991) and thematic (Flick, 2014b) coding.

In the publication Hummel, Engelbrecht, and Werning (2016) we reprocess and present key empirical results from the Malawi country study. In Hummel (2016) I reflected the results from the Malawian country study in the light of a different theoretical approach. Certain parts of the overall collected data were excerpted and analysed under new research questions (Hummel & Engelbrecht, 2018; Hummel & Werning, 2016) in order to widen the scope of the initial data analysis. Hummel (submitted) was inspired by the Refie project but does not draw on its data or results. Figure 2 visualises this research process as hermeneutic circular process.

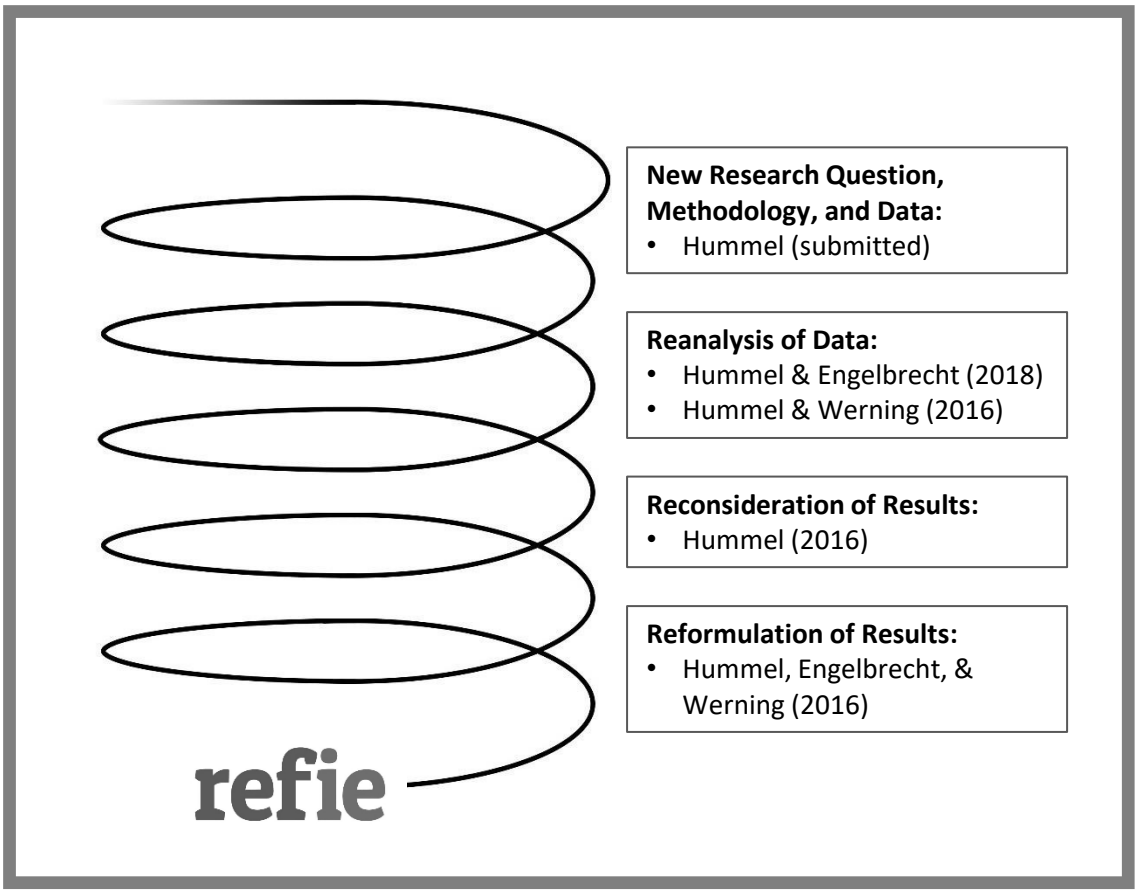

Figure 2: Research process as hermeneutic circular process

5.2 Research Questions

This publication-based dissertation intends to answer three overall research questions, namely:

- How is inclusive education implemented in specific contexts?
- How is inclusive education constructed by different stakeholders?
- How is inclusive education constructed through research?

In short, this research investigates the practice of inclusive education, the constructions of inclusive education by different stakeholders in specific contexts, the interrelation between implementation and these constructions, and the constructions of inclusive education through research. The specific research questions of each single publication can be categorised under these overall research questions. This attribution is presented in figure 3.

Not only the publications themselves, but also the dissertation framework contributes to answering the research questions. A synthesis of the results of the single publications is presented in chapter 8.

<table>
<tr><td></td><td colspan="3">Overall Research Questions</td></tr>
<tr><td></td><td>How is inclusive education implemented in specific contexts?</td><td>How is inclusive education constructed by different stakeholders?</td><td>How is inclusive education constructed through research?</td></tr>
<tr><td></td><td colspan="3">Specific Research Questions</td></tr>
<tr><td>Hummel, Engelbrecht, & Werning (2016)</td><td>Which success factors of and barriers to inclusive educational systems can be identified?</td><td>How is the concept of inclusive education constructed at the different levels from various perspectives in Malawi?</td><td></td></tr>
<tr><td>Hummel (2016)</td><td colspan="2">How is inclusive education in Malawi recontextualised on the respective levels?</td><td></td></tr>
<tr><td>Hummel & Werning (2016)</td><td colspan="2">What are the specifics (in understanding and implementation) of inclusive education in so-called developing countries at the example of Guatemala and Malawi?</td><td></td></tr>
<tr><td rowspan="2">Hummel & Engelbrecht (2018)</td><td>How do social dimensions of diversity manifest in Malawian primary schools?</td><td>How are dimensions of diversity constructed by the respective stakeholders in Malawi?</td><td rowspan="2"></td></tr>
<tr><td colspan="2">How do constructions of diversity and teacher education programmes interact?</td></tr>
<tr><td>Hummel (submitted)</td><td></td><td></td><td>How is the definition of inclusion and the rationale for inclusion constructed in the academic discourse in southern Africa?</td></tr>
</table>

Figure 3: Overall and specific research questions

5.3 Levels of Constructions

In section 2.2 I referred to Schütz (1971), who declares constructions of researchers, i.e., constructions of the constructions of the research subjects, as second degree constructions. This research constructs knowledge on different levels. The three overall research questions create knowledge on different levels of constructions. The first research question looks at the implementation of inclusive education and analyses the practice of inclusion in specific contexts. Findings on this question are therefore constructions by the researcher, meaning first degree constructions. The second question addresses the constructions of inclusive education of different stakeholders in the Malawian and Guatemalan education system and refers to the theoretical debate on the definitions of inclusive education. Investigating the constructions of the research subjects therefore leads to constructed knowledge on a second degree. The third question takes a broader view and asks how research constructs inclusive education. The research under analysis can either be research on inclusive education or research constructions of stakeholders on inclusive education. Hence, research on research can either create constructions on second or third degree. The figure below visualises these relations.

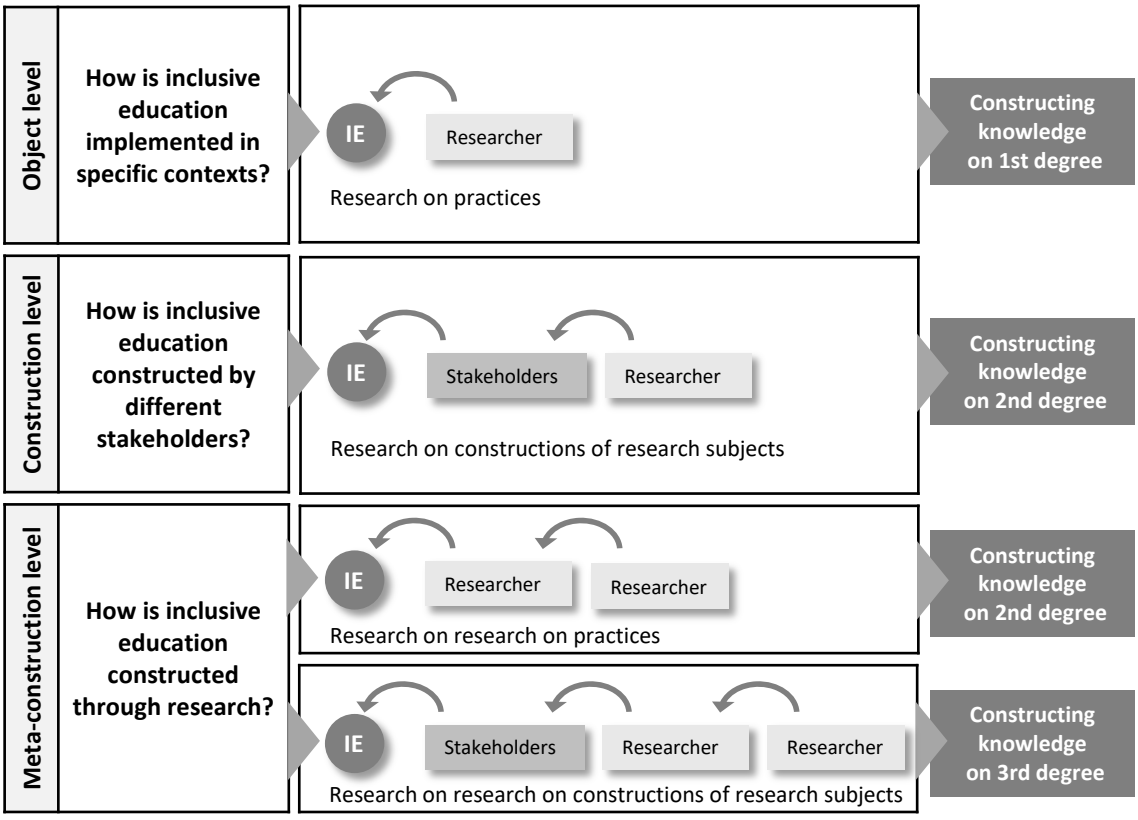

Figure 4: Relation between research questions and levels of knowledge construction

5.4 Overall Methodological Approach

This qualitative research is characterised by a multiperspective approach, as perspectives from persons with different roles and experiences in regard to the research object form a major part of the analysed data.

Principle of Openness

The overall research process was guided by the principle of openness. Being a general paradigmatic orientation in qualitative research, the principle of openness is present to varying extent within qualitative scholarly work. The most radical implementation of this orientation is formulated by Glaser and Strauss (1967). According to Hoffmann-Riem (1980, p. 343) the principle of openness means deferring the theoretical structuring of the research object through the researcher(s) until after the research object is structured through the empirical data. This results in avoiding the development of hypotheses ex ante, and instead considering the development of hypotheses as an aim of the research. Lamnek (1988, p. 22) categorises this open orientation as regarding the participants of the study, the situation of data collection, and the applied methods. The hereby-presented research did not start with one theoretical model to analyse the object, but rather progressed from the empiricism and related the results to concepts and theories. This approach regarding the relation of theory and empiricism can be described as empiricism-driven theoretical reconstruction (Friebertshäuser, Richter, & Boller, 2013, p. 386).

The principle of openness in this study resulted, e.g., in the continuous development of the research questions of the single publications. Different parts of the overall Refie project data were selected for further analysis under adjusted research questions. The results again led to new research questions and the use of additional methods and new material, e.g., in Hummel (submitted). As a result, the open approach leads to the application of triangulation. The multiperspective design of the study additionally contributes to the triangulation in this study.

Triangulation

Several early studies applied what we nowadays call the use of triangulation in qualitative research (Flick, 2018), but it was Denzin (1978) who provided the first systematisation of the approach. Flick (2007) describes the purpose and benefits of triangulation as follows:

> Triangulation . . . should allow a principle surplus of knowledge. For example, triangulation should produce knowledge at different levels, which means they go beyond the knowledge made possible by one approach and thus contribute to promoting quality in research. (p. 41)

Triangulation becomes relevant in the conception that the research object is (also) constructed through the applied methods (Flick, 2004). In his early works, Denzin (1978) constitutes triangulation as a strategy for validation:

> Triangulation, or the use of multiple methods, is a plan of action that will raise sociologists above the personalistic biases that stem from single methodologies. By combining methods and investigators in the same study, observers can partially overcome the deficiencies that flow from one investigator or one method. Sociology as a science is based on the observations generated from its theories, but until sociologists treat the act of generating observations as an act of symbolic interaction, the links between observations and theories will remain incomplete. (p. 294)

He defines different types of triangulation:

- Data Triangulation: Researchers use different data sources. In the hereby-presented study, interviews and focus group discussions, participatory observations, policy and practice documents, and academic publications formed part of the overall data corpus.
- Investigator Triangulation: Multiple observers are involved in order to avoid potential bias from a single researcher and to reach greater reliability. In the Refie study, national teams of researchers in both countries with complementary backgrounds, experiences, and skills collected the data. A continuous exchange between the national teams and the international research advisors complemented these perspectives.
- Theory Triangulation: “various theoretical points of view could be placed side by side to assess their utility and power” (Denzin, 1978, p. 297). Sustained by the principle of openness, the data was interpreted in the light of different theoretical approaches rather than by applying one single theoretical perspective on the research object.
- Methodological Triangulation: Each method has its strengths and weaknesses. The aim of methodological triangulation is to use different advantages by combining methods. Methods of data collection varied within the research project. Data was collected through interviews and focus group discussions, but also through observations and gathering documents.

Triangulation therefore intends to increase the quality of the research.

Quality Criteria

Discourses around quality criteria in qualitative research are far from conclusive (Flick, 2014a, p. 480). The classical criteria to evaluate research, namely reliability, validity, and objectivity, stem from quantitative research and generally accepted in this strand of research practice. Some scholars in the field of qualitative research (e.g., Kirk & Miller, 2005) intended to transfer and reformulate these criteria for qualitative research. The aspect of validity usually receives most attention in discussions within qualitative research, as "the question of validity boils down to a question of whether the researchers in fact see what they think they see" (Flick, 2014a, p. 483). Under a social constructivist perspective, validity is not about revealing reality, but assessing to what extent the constructions of the researchers are based in the constructions of the researched. A useful measure to achieve validity is the concept of communication validation, which aims to involve the research subjects in the overall study beyond mere data collection. After data collection, the research subjects are consulted for confirming preliminary findings, structuring the given statements, and, in some understandings, discussing the interpretation of their statements and research results (Flick, 2014b, p. 495). In the Refie research project, two validation meetings were undertaken in each study country to discuss initial and final results with the participants of the study. Initial results, which eventually led to the publication Hummel (submitted), were presented and discussed with peers at a conference in South Africa.

Mishler (1990) reformulates the concept of validity and stresses the process of validation. He defines validation as "social construction of knowledge" (p. 417). In this understanding, "validity claims are tested through the ongoing discourse among researchers" (Mishler, 1990, p. 415). Consequently, the major criterion for validation is whether the community of scientists evaluates research results as trustworthy. Peer reviews can therefore be regarded as one tool for validation. Mishler's reformulation of validation in a social constructivist perspective refers to a more overarching discourse on the possibility of criteria in general.

The next chapter briefly introduces the single publications that are fully included in chapter 7. Chapter 8 summarises the research results from the single publications and discusses the results in light of the previous chapters.

6 Overview of the Publications

Hummel, M., & Engelbrecht, P., & Werning, R. (2016). Developing an understanding of inclusive education in Malawi. In R. Werning, A. J. Artiles, P. Engelbrecht, M. Hummel, M. Caballeros, & A. Rothe (Ed.), ***Keeping the promise? Contextualizing inclusive education in developing countries*** **(pp. 29–46). Bad Heilbrunn: Julius Klinkhardt.**

Research Questions:

- How is the concept of inclusive education constructed at the different levels (macro, meso, micro) from various perspectives in Malawi?
- Which success factors of and barriers to inclusive educational systems can be identified in order to draw conclusions for further developing cooperation measures?

Approach and Method: Presentation of key results from the Refie study on Malawi

Data analysed: Refie data on Malawi

Levels of Analysis: Malawi: national – regional – local

Main Findings:

The results indicate underlying tensions and ambiguities in the implementation of inclusive education along the following poles:

- Malawi between special needs education and inclusive education
- Malawi between idealism of policy and reality in schools
- Malawi between traditional orientations, demands of daily living and formal education

Review Process: Internal review process through the editors of the book

Own Contribution: Based on the Refie research design and results, I developed an outline of the chapter and wrote the first full draft. Both co-authors commented on the manuscript and contributed to the contents. I took responsibility for revision and submission of the final manuscript.

Hummel, M. (2016). Die Entwicklung inklusiver Bildung in Malawi: Zwischen makro-politischer Deklaration und lokaler Umsetzung [The development of inclusive education in Malawi: Between macro-political declaration and local implementation]. *Zeitschrift für Inklusion*. (1). Retrieved from https://www.inklusion-online.net/index.php/inklusion-online/article/view/343

Research Question: How is inclusive education in Malawi recontextualised on the respective levels?

Approach and Method: Situating results from the Refie study on Malawi amidst the Educational Governance Approach

Data analysed: Refie results on Malawi

Levels of Analysis: Malawi: international – national – regional – local

Main Findings:

- Several categories of difference are acknowledged in the national policy documents, but do not explicitly refer to inclusion.
- Recontextualisation on macro level is predominantly focused on terminological aspects. Specific terminology from international papers and agreements is transferred without a local debate or adaptations.
- The meso level receives ambitious and abstract targets from the macro level and simultaneously has only very limited possibilities of acting.
- The micro level is characterised by an enormous lack of resources and classes with great diversity. Context-sensitive approaches in the support of deprived students are developed and implemented insularly.

Review Process: Multistage blind peer review process

Hummel, M., & Werning, R. (2016). Inclusive education: "Same same but different". Examples from Guatemala and Malawi. *ZEP – Zeitschrift für internationale Bildungsforschung und Entwicklungspädagogik, 39*(3), pp. 22-27.

Research Question: What are the specifics of inclusive education in so-called developing countries in the examples of Guatemala and Malawi?

Approach and Method: New analysis of data from Refie project

Data analysed: Refie data

Levels of Analysis: Malawi and Guatemala: national – regional – local

Main Findings:
Specifics characteristics in the understanding and implementation of inclusive education in Malawi and Guatemala are:

- Different understandings of the concept inclusion are in use in policy documents and by stakeholders. Inclusive education often reflects a traditional deficit approach of disability. But at the same time, various forms of differences which can lead to marginalisation are mentioned in education policy documents.
- The development of inclusive education in deeply segregated societies like Guatemala highlights fundamental contradictions.
- Formal education is in certain contexts not aligned with the living conditions. The promises of inclusion expose the failed promises of formal education in general.
- The presence of donor organisations creates specific dynamics of power and competition.

Conclusion: Inclusive education highlights and intensifies difficulties and tensions that have been present throughout.

Review Process: Multistage peer review process through two editors of this issue

Own Contribution: I conceptualised the outline, analysed the Refie data under the specific research focus of this publication, and wrote the first full draft. The co-author commented on the manuscript and contributed to the contents. I took responsibility for revision and submission of the final manuscript, communication with the editors, and incorporation of the peer-reviewers' feedback.

Hummel, M., & Engelbrecht, P. (2018). Teacher education and notions of diversity in Malawi. In Walton, E., Osman, R. (Ed.), ***Teacher education for diversity: Perspectives from the global South*** **(pp. 121–138). London: Taylor & Francis.**

Research Questions:

- How do social dimensions of diversity manifest in Malawian primary schools?
- How are dimensions of diversity constructed by pre-service teachers, in-service teachers, head teachers, and lecturers in teacher education in Malawi?
- How do constructions of diversity and teacher education programmes interact?

Approach and Method: New analysis of Refie project data

Data analysed: Selected data from the Refie project on teacher education in Malawi on macro, meso, and micro level

Levels of Analysis: Malawi: national – regional – local

Main Findings:

- Numerous forms of difference result in educational marginalisation. Education professionals, teachers and head teachers are aware of these differences and resulting marginalisation.
- In pre-service teacher education, a traditional expert/specialist model is employed. In the teacher education curriculum, the classification of learners in disability categories is based on a medical deficit approach.
- Most teachers believe that learners with special needs should be accommodated in mainstream schools. Special learning support, however, is mainly considered responsibility of special education teachers.

Review Process: Peer reviewed through the editors of the book and one external reviewer

Own Contribution: I conceptualised the outline, analysed the Refie data under the specific research focus of this publication, and wrote the first full draft. The co-author gave feedback on the manuscript and contributed to the contents. She was in charge in particular of the discussion section. I took responsibility for revision and submission of the final manuscript, communication with the editors, and incorporated the peer-reviewers' feedback.

Hummel, M. (2018). 'Inclusion and inclusions': Discourses on inclusive education in southern Africa. In M. Hummel, Inclusive education in situated contexts: A social constructivist approach. Publication-based dissertation, Leibniz Universität Hannover.

Research Question: How is the definition of inclusion and the rationale for inclusion constructed in the academic discourse in Southern Africa?

Approach and Method: Sociology of Knowledge Approach to Discourse (Keller 2001, 2013), Systematic Literature Review (Hart 1998, Cooper 1988)

Data analysed: 66 academic publications

Levels of Analysis: Southern Africa: academic discourse

Main Findings:

- Rationale for inclusion: A South African-specific discourse emerged, interweaving state development and the development of an inclusive society through education.
- The efficacy discourses draw on empirical results from the global North, normative statements like Salamanca Statement, and national policy. References to empirical evidence from southern Africa are nearly non-existent and Northern efficacy discourses are not contextualised.
- Definitions in use: In South Africa, discourses are marked by a terminology and notion of inclusive education from the national policy with a focus on barriers to learning within the system. In the other southern African countries, the definitions in use vary between a broad and narrow understanding.
- In the naming of categories of difference, a clear contextualisation to the conditions of southern Africa becomes visible.
- National discourses in southern Africa are not interrelated nor interacting. This becomes obvious as no cooperation exists within this region across countries in authorship and references are to scholars from the same country affiliation.

7 Publications

7.1 Hummel, M., Engelbrecht, P., & Werning, R. (2016). Developing an understanding of inclusive education in Malawi. In R. Werning, A. J. Artiles, P. Engelbrecht, M. Hummel, M. Caballeros, & A. Rothe (Eds.), *Keeping the Promise? Contextualizing inclusive education in developing countries* (pp. 29–46). Bad Heilbrunn: Julius Klinkhardt.

Myriam Hummel, Petra Engelbrecht and Rolf Werning

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 Child-care 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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7.2 Hummel, M. (2016). Die Entwicklung inklusiver Bildung in Malawi: Zwischen makro-politischer Deklaration und lokaler Umsetzung [The development of inclusive education in Malawi: Between macro-political declaration and local implementation]. *Zeitschrift für Inklusion*. (1). Retrieved from https://www.inklusion-online.net/index.php/inklusion-online/article/view/343

Myriam Hummel: Die Entwicklung inklusiver Bildung in Malawi: zwischen makro-politischer Deklaration und lokaler Umsetzung

Abstract: Inklusive Bildung wird im Rahmen von internationalen Konventionen und Zielvorgaben derzeit, geleitet von einem globalen Diskurs, in vielen unterschiedlichen Ländern umgesetzt. In diesem Beitrag werden empirische Befunde aus einem qualitativen, mehr-perspektivisch angelegten Forschungsprojekt unter einer Governance-theoretischen Perspektive dargestellt. Die Autorin stellt die Rekontextualisierung des Konzepts der inklusiven Bildung in Malawi auf den jeweiligen Ebenen des Bildungssystems dar und leitet daraus die besondere Bedeutung der Mikro-Ebene in der Umsetzung von pädagogischen Reformen ab im gegebenen Kontext ab.

Stichworte: Inklusive Bildung; Rekontextualisierung; Entwicklungsländer; Entwicklungszusammenarbeit; Malawi

Inhaltsverzeichnis

1. Einleitung

Inklusive Bildung wurde bereits vor fast 20 Jahren als globale Agenda betitelt (Pijl et al., 1997). Artiles und Dyson (2005, S. 37) beschreiben das Spannungsverhältnis von inklusiver Bildung durch globale und regionale Diskurse. Im globalen Diskurs wird inklusive Bildung als internationale Bewegung bezeichnet, die einerseits weltweit die nationale Politikgestaltung beeinflusst, andererseits getragen wird von internationalen Abkommen (vorrangig Salamanca-Deklaration 1994) und Organisationen (wie UNESCO, aber auch internationale Nichtregierungsorganisationen). Der regionale Diskurs wird in unterschiedlichen lokalen Kontexten umgesetzt, dies gilt auch für sogenannte Entwicklungsländer[1]. Dabei werden Ansprüche und Konzepte von inklusiver Bildung aus den sogenannten Industrieländern scheinbar direkt importiert. Im Folgenden werden Ergebnisse eines internationalen Forschungsprojektes vorgestellt, wobei insbesondere auf Grundlage der Forschungsperspektive der Educational Governance die Bedingungen der Umsetzung von Inklusion in der Mehrebenenarchitektur des Bildungssystems in Malawi näher beleuchtet werden.

2. Das Forschungsdesign

Das 14-monatige Forschungsvorhaben *Research for Inclusive Education in International Cooperation*[2] setzte sich zum Ziel ein Verständnis über die Entwicklung von inklusiven Bildungssystemen in sogenannten Entwicklungsländern zu erhalten. Insgesamt zielte das Projekt auf die Identifikation institutioneller Handlungsmuster ab, welche dazu beitragen können inklusive Bildungsprozesse zu fördern und beeinträchtigende Bedingungen zu minimieren.
Bei dem Forschungsprojekt stand die angewandte Forschung im Mittelpunkt. Diese Forschungsorientierung

zeichnet sich dadurch aus, dass neue Erkenntnisse gewonnen werden, um konkrete praktische Handlungsperspektiven für die Lösung aktueller Probleme zu entwickeln (Walker, 1985). Ziel war es, aufzuzeigen, ob, wo und wie etwas verändert werden kann, um die Wahrscheinlichkeit der Umsetzung von inklusiver Bildung in Malawi und Guatemala zu erhöhen. Die Zielsetzung war zunächst eine möglichst genaue, dichte und mehrperspektivisch fundierte Beschreibung der Sichtweisen der beteiligten Subjekte und ihrer subjektiven und sozialen Konstruktionen von benachteiligten Gruppen und inklusiver Bildung. Darauf aufbauend wurden die Differenzen und Übereinstimmungen der beteiligten Personengruppen innerhalb und zwischen den unterschiedlichen Systemebenen identifiziert . Darüber hinaus ging es darum, die hinter den Beschreibungen liegenden Begründungsmuster für spezifische Einstellungen, Perspektiven und Handlungsoptionen bzw. Handlungseinschränkungen zu untersuchen.
Die übergeordneten Forschungsfragen des Vorhabens waren:

- Wie ist das Konzept inklusiver Bildung auf verschiedenen Ebenen aus verschiedenen Perspektiven in Guatemala und Malawi konstruiert?
- Welche Erfolgsfaktoren und Barrieren bei der Umsetzung von inklusiven Bildungssystemen können identifiziert werden?

Die spezifischen Forschungsfragen orientierten sich an den vier Dimensionen von inklusiver Bildung: Zugang, Akzeptanz, soziale Partizipation und Leistungs- und Persönlichkeitsentwicklung (Booth et al., 2000; Kalambouka et al., 2005). Vor dem Hintergrund der zur Verfügung stehenden Zeit und Mittel fokussierte sich das Forschungsvorhaben auf die ersten drei Dimensionen.
Das Forschungsdesign war qualitativ und mehrperspektivisch angelegt und versuchte Makro-, Meso- und Mikroebenen zu verbinden. Nach den Annahmen des Paradigmas einer konstruktivistischen Methodologie prägt dabei nicht nur die theoretische Bestimmung des Gegenstandes, was beobachtet werden kann und wie das Forschungsdesign angelegt wird (Graue & Hawkins, 2005, S. 45), sondern der Gegenstand selbst wird in einem Wechselwirkungsprozess durch die verwendeten Methoden (mit-)konstituiert (vgl. Flick, 1999).
Diverse Methoden der Datenerhebung wurden angewendet:

- Dokumentenanalyse von länderspezifischen Dokumenten wie nationale Gesetzgebung, Politikpapiere und Strategien ebenso wie Praxispapiere (z.B. von Nichtregierungsorganisationen und Gebern) und existierende Forschungsergebnisse (Wolff, 2008);
- 54 Gruppendiskussionen (Lamnek, 1998) und problemzentrierte Interviews (Witzel & Reiter, 2012) mit Expertinnen und Experten unterschiedlicher Interessenvertretungen auf der Makro-Ebene in beiden Ländern;
- Problemzentrierte Interviews auf der Meso-Ebene mit ungefähr 50 Mitarbeiterinnen und Mitarbeitern der Schulverwaltung und Expertinnen und Experten von Nichtregierungsorganisationen aus den Distrikten der Fallstudien;
- Instrumentelle Fallstudien (Stake, 2005) in ausgewählten Schulen und deren umgebenden „Communities“, bestehend aus teilnehmender Beobachtung, Interviews und Gruppendiskussionen mit Schülerinnen und Schülern, Eltern, Lehrerinnen und Lehrern, Schulleiterinnen und Schulleitern und signifikanten Erwachsenen außerhalb der Schule. In Guatemala wurden sechs Fallstudien durchgeführt, in Malawi vier.

Die gesamte Datenbasis umfasst insgesamt ca. 245 Transkripte von Interviews, Gruppendiskussionen und Feldnotizen. In Anlehnung an das thematische Kodieren nach Flick (1996; 2004) und unter Einsatz von Techniken des offenen Kodierens nach Strauss (1994; Strauss & Corbin, 1996) wurden zunächst die einzelnen zuvor transkribierten und übersetzten Gruppendiskussionen, Interviews sowie die Beobachtungs- und Feldnotizen unter Nutzung von QDA-Software ausgewertet. Dieser Auswertungsprozess wurde durch

einen vorab entwickelten Kodebaum vorstrukturiert, der während des Auswertungsprozesses angepasst und erweitert wurde.
Die Datenerhebung und -analyse wurde durch ein nationales Forschungsteam in Guatemala und eins in Malawi in Kooperation mit internationalen Forscherinnen und Forschern durchgeführt[3]. Um der Diversität der Bevölkerung beider Länder, die für die Forschungsergebnisse eine elementare Bedeutung spielt, Rechnung zu tragen, wurde in der personellen Zusammensetzung der Forschungsteams auf Diversität hinsichtlich ethnische Zugehörigkeit, Sprachkenntnisse und Geschlecht geachtet. Die erhobenen Daten aus Interviews und Gruppendiskussionen verfügen über eine besondere Qualität, da Interviewende und Interviewte sich derselben sprachlichen und kulturellen Gruppe zugehörig fühlten, sodass u.a. die Teilnehmenden der Studie in ihrer Erstsprache sprechen konnten. Zugleich stellte der Aspekt Sprache eine erhebliche Herausforderung für dieses Projekt dar (Mertens, 2009). Die Mitarbeiterinnen und Mitarbeiter des gesamten Forschungsteams verfügten über unterschiedliche Erstsprachen, sodass auf Englisch als Sprache für die allgemeine Projektkommunikation zurückgegriffen wurde, obwohl diese häufig nur Zweit- oder Drittsprache der beteiligten Personen war. Die Daten wurden aus lokalen Sprachen (z.B. Chichewa, K'iche', Kaqchikel) von den beiden nationalen Forschungsteams ins Englische bzw. Spanische übersetzt. Daher musste jede Forscherin und jeder Forscher sorgfältig die eigene Interpretation der Daten und der spezifischen Konzepte überprüfen und ein tiefgreifendes Verständnis der umfassenden kulturellen Implikationen des Sprachgebrauchs entwickeln.
In diesem Beitrag werden die Forschungsergebnisse aus Malawi aus einer Governance-theoretischen Perspektive dargestellt. Die Darstellung und Zusammenführung der Ergebnisse beider Länder würde diesen Rahmen sprengen und erfolgt unter unterschiedlicher Fokussierung an anderer Stelle (Werning et al., i.E.).
Malawi ist in Bezug auf seine Bevölkerung und Landesgröße eine verhältnismäßig kleine Nation im südlichen Afrika. Die Unabhängigkeit von Großbritannien erreichte das Land mit vorwiegend friedlichen Mitteln 1964 (Dickovick, 2014). Auf dem 174. Platz von insgesamt 187 Ländern des Index der menschlichen Entwicklung (United Nations Development Programme, 2014, S. 159ff) zählt Malawi zu den ärmsten Ländern. Malawi ist ein Agrarland mit einem sehr hohen Anteil der Bevölkerung, der im ländlichen Raum lebt. Die Bevölkerung setzt sich aus verschiedenen ethnischen Gruppen zusammen, die insgesamt mindestens neun verschiedene Sprachen sprechen (Dickovick, 2014).
In Malawi umfasst eine abgeschlossene Primarschulbildung acht Jahre. In den staatlichen Primarschulen wurden 1994 Schulgebühren abgeschafft, was in einem enormen Anstieg der Einschulungsquoten resultierte (Inoue & Oketch, 2008). Die Unterrichtssprache ist in den ersten vier Klassenstufen Chichewa. In den darauffolgenden Klassenstufen wird auf Englisch unterrichtet. Wie im restlichen Sub-Sahara Afrika stellt eine hohe Schulabbrecher-Quote ein Hauptproblem im Bildungssektor dar: nur 31% der eingeschulten Erstklässler verbleiben in der Schule bis zur achten Jahrgangsstufe (Ministry of Education, Science and Technology, 2013, S. 21).

3. Inklusive Bildung im Mehrebenensystem: eine theoretische Kontextualisierung

Die Educational Governance-Perspektive betrachtet komplexe soziale Systeme, wie das Bildungssystem eines jeweiligen Landes, als Mehrebenensysteme und thematisiert insbesondere Fragen der grenzüberschreitenden Koordination zwischen den Systemebenen (Altrichter & Maag Merki, 2010, S. 24f). Die Fokussierung auf die Handlungskoordination zwischen verschiedenen Akteuren innerhalb einer Ebene und zwischen verschiedenen Ebenen stellt einen elementaren Forschungsansatz der Governance-Forschung dar. Das Konzept des Mehrebenensystems ermöglicht „einen auf Akteure und Institutionen bezogenen Analyserahmen zu entwerfen, mit dem sich die Interdependenz, die Interdependenzbewältigung und das Interdependenzmanagement der Akteure studieren lässt" (Kussau & Brüsemeister, 2007, S. 32). Die genaue Fassung der einzelnen Ebenen in Bildungssystemen wird im Fachdiskurs derzeit verschiedentlich

vorgenommen (vgl. Altrichter & Maag Merki, 2010, S. 25). In diesem Forschungsvorhaben wurde mit der Makro-Ebene die nationale Ebene, mit der Meso-Ebene die Ebene der Distriktverwaltung und der Mikro-Ebene die einzelne Schule inklusive der sie umgebenden „Community“ bezeichnet.

In der Betrachtung des Bildungssystems als Mehrebenensystems wird deutlich, dass auch die Umsetzung von inklusiver Bildung auf den diversen Ebenen des Bildungssystems stattfindet. Hierdurch erhalten die Akteure auf jeder Ebene eigene Handlungsperspektiven und aktive Gestaltungsmöglichkeiten. Jede Ebene hat dabei zum einen „den Blick nach oben“, der spezifische Vorgaben, Regularien aber auch Erwartungen umfasst; zum anderen betrachtet jede Ebene die nachfolgende, um spezifische Auswirkungen des eigenen Handelns zu antizipieren. Vorgaben werden somit auf keiner Ebene einfach übernommen. Jede Ebene adaptiert vielmehr die Vorgaben der jeweilig nächst höheren Ebene und passt diese aktiv an die eigenen Kontextbedingungen an. Das Konzept der Rekontextualisierung (Fend, 2008, S. 26) stellt damit heraus, dass auf den Ebenen – abhängig von den jeweiligen Umweltbedingungen – spezifische Handlungsperspektiven entstehen, die auf divergenten Handlungslogiken, Werthierarchien, „Sprachen“ und Aufmerksamkeitsprioritäten der jeweiligen Ebene beruhen (Altrichter & Maag Merki 2010, S. 25) und spezifische Kompetenzen, Handlungsinstrumente, Zuständigkeiten und Verantwortlichkeiten mit sich bringen .
Fend präzisiert das Rekontextualisierungskonzept anhand fünf Definitionsmerkmalen (vgl. Fend, 2008, S. 27), welche hier auf die Einführung inklusiver Bildung bezogen werden:

- Die Wirksamkeit des offiziellen Programms wird präsent gehalten. D.h. auf allen Ebenen wird das Konzept von inklusiver Bildung diskutiert. Die offizielle Anforderung, abgeleitet aus internationalen Papieren wird auf der nationalen, der regionalen und der lokalen Ebene präsent gehalten.
- Die Rahmenvorgaben, die bei Inklusion recht unspezifisch sind, werden auf den jeweiligen Ebenen mit den je spezifischen Handlungsbedingungen adaptiert.
- Die Adaption wird einerseits von institutionellen Vorgaben (z.B. Selektionsprozesse, Notengebung) und andererseits von reflexiven Prozessen der Selbst- und Fremdwahrnehmung, von Kompetenzen der Aufgabenerfüllung und von situativen Konstellationen beeinflusst.
- Letzteres lässt eigene Handlungsinstrumente, Kompetenzen und Verantwortungen auf den verschiedenen Ebenen entstehen.
- Auch von unteren Ebenen kann Druck entstehen, wenn institutionelle Vorgaben die eigene Aufgabenbewältigung erschweren oder problematische Ergebnisse provozieren.

4. Darstellung ausgewählter Forschungsbefunde aus Malawi

Die Republik Malawi hat alle relevanten UN-Konventionen wie das Übereinkommen über die Rechte des Kindes und das Übereinkommen über die Rechte von Menschen mit Behinderungen unterzeichnet und ratifiziert (United Nations Treaty Collection, o.D.a, United Nations Treaty Collection, o.D.b). Die durchgeführte Dokumentenanalyse hat gezeigt, dass die legislativen Voraussetzungen in Malawi das Recht auf Bildung für alle regeln und somit einen adäquaten Rahmen für die Umsetzung von inklusiver Bildung bilden. Darüber hinaus zeigt sich in den relevanten Politikpapieren ein Verständnis von unterschiedlichen existierenden Dimensionen der Benachteiligung, vorrangig in Bezug auf den Zugang zu formaler Bildung. Im aktuellen nationalen Plan für den Bildungssektor Malawis werden z.B. Maßnahmen besonders für jene, die aufgrund von Geschlecht, Armut, besonderen Bedürfnissen und geographischer Lage benachteiligt sind, formuliert (Ministry of Education, Science and Technology, 2008, S. 12).
Durch die Auswertung der malawischen Politikpapiere wird deutlich, dass ein uneinheitliches und unklares Konzept von inklusiver Bildung existiert (Research for Inclusive Education in International Cooperation, 2015). Die Begrifflichkeit der inklusiven Bildung wird in mehreren Papieren verwendet, allerdings umschreibt sie meist ein traditionelles sonderpädagogisches Verständnis, das auf ein medizinisches,

defizitäres Modell von Behinderung begründet ist. So ist das Gros der erwähnten Umsetzungsmaßnahmen auf Menschen mit körperlicher Behinderung, gehörlose und blinde Menschen ausgerichtet und umfasst vorrangig die Ausstattung mit medizinischen und technischen Hilfsmitteln, wie z.B. Mobilitätshilfen, Materialien in Braille, Verwendung von Gebärdensprache (Ministry of Education, 2009, S. 8). Ein Verständnis für unterschiedliche Benachteiligungsdimensionen – jenseits von Behinderung und sonderpädagogischem Förderbedarf –, die zu Exklusion in Bezug auf formale Bildung führen können (wie Geschlecht, Armut und geografische Lage), wird in den Politikpapieren deutlich, jedoch werden diese Aspekte nicht unter dem Begriff und dem Konzept von inklusiver Bildung gefasst.

Die durchgeführten Gruppendiskussionen mit verschiedenen Akteuren der Makro-Ebene zeigen, dass auch zwischen den unterschiedlichen Teilnehmenden der Studie das Verständnis von inklusiver Bildung stark variiert. Manche Studienteilnehmerinnen oder -teilnehmer lassen ein breites Verständnis von inklusiver Bildung im Sinne einer Reduzierung von Barrieren in Bezug auf Bildung für alle Kinder erkennen; wohingegen andere den Begriff inklusive Bildung verwenden, um einen sonderpädagogischen Ansatz der Förderung von Schülerinnen und Schülern mit Behinderung zu beschreiben.

Die Rekontextualisierung des globalen Diskurses über inklusive Bildung findet auf makro-politischer Ebene in Malawi vorrangig in einer terminologischen Weise statt. Die auf internationaler Ebene verwendete Fachterminologie wird übernommen, ohne eigene, kritische konzeptionelle Auseinandersetzung, ohne Anpassung auf den nationalen Kontext und ohne die Definition von konkreten Schritten der Umsetzung auf den untergeordneten Ebenen. Das Bemühen der nationalen politikgestaltenden Akteure könnte als Versuch internationale Vorgaben zu erfüllen verstanden werden. Das Bemühen und vielleicht auch die Notwendigkeit, internationale Vorgaben aufzugreifen und in bestehende nationale Entwicklungspläne zu integrieren, kann in den Anforderungen der Geberländern der Entwicklungszusammenarbeit begründet liegen. Der Blick der Makro-Ebene scheint stärker nach oben auf die internationale Ebene als auf die unteren lokalen Ebenen ausgerichtet zu sein.

Die Meso-Ebene ist in Malawi in einer diffizilen Situation. Auf der einen Seite mit „Blick nach oben“ sind die Herausforderungen sehr anspruchsvoll, denn inklusive Bildung stellt hohe Anforderung an die Entwicklung von Schulen. Gleichzeitig sind die auf Makro-Ebene formulierten Ziele eher unspezifisch gehalten und geben keine konkreten Handlungsperspektiven für die nachfolgenden Ebenen vor. Wenn die Akteure der Meso-Ebene „nach unten“ blicken, erkennen sie die konkreten Schwierigkeiten auf der lokalen Ebene. Da sie selbst über wenig oder keine Ressourcen verfügen, können sie nur begrenzt Entwicklungen anregen und umsetzen und verharren in einer verwaltenden Funktion. Viele Akteure der Meso-Ebene in Malawi beschreiben sich selbst im System als nahezu handlungsunfähig. In einzelnen Regionen werden zwar innovative Ansätze angestrebt, diese scheitern jedoch häufig an einer überwältigenden Ressourcenknappheit. Das Auseinanderklaffen von abstrakten und gleichzeitig sehr anspruchsvollen Zielvorgaben und den eingeschränkten konkreten Handlungsmöglichkeiten führt hier meist zu einer schwierigen „Sandwichposition“ der Akteure der Meso-Ebene.

Die Akteure auf der Mikro-Ebene sind mit vielfältigen Herausforderungen konfrontiert. Der überwältigende Mangel an Ressourcen (personell, finanziell, materiell) wird in den Schulen besonders deutlich und betrifft die Bildungsqualität aller Kinder in Malawi. Durchschnittlich kommen nach Angaben des malawischen Bildungsministeriums in der Primarschule in Malawi auf einen Lehrer oder eine Lehrerin derzeit 69 Schülerinnen und Schüler (Ministry of Education, Science and Technology Malawi, 2013, S. 19). Durch die teilnehmenden Beobachtungen der Studie wurden Klassengrößen von bis zu 160 Schülerinnen und Schülern dokumentiert. Aus der Sicht der Lehrkräfte bildet die hohe Klassengröße eine zentrale Herausforderung in ihrer Arbeit. Zudem sind die Klassen in Malawi durch eine hohe Heterogenität geprägt. Ein Aspekt der Heterogenität betrifft das Alter der Schülerinnen und Schüler in einer Lerngruppe. Daten des Bildungsministeriums belegen, dass im Schuljahr 2012/13 in der ersten Klasse der Primarschule Schülerinnen und Schüler im Alter zwischen 4 und 17 Jahren waren (ebd., S. 36).

Die durch die Studie identifizierten Barrieren sind auf den verschiedenen Ebenen des malawischen

Bildungssystems sehr ähnlich und umfassen vorrangig ein diffuses und uneinheitliches Verständnis von inklusiver Bildung und eine enorme Ressourcenknappheit. Die auf den jeweiligen Ebenen identifizierten Erfolgsfaktoren und Chancen hingegen variieren zwischen den Ebenen. Auch im horizontalen Vergleich der Erfolgsfaktoren innerhalb der Mikro-Ebene werden Unterschiede in den Erfolgsfaktoren der einzelnen Fallstudien deutlich. Einige Fälle von innovativer Problemlösung und einem Einsatz weit über die beruflichen Anforderungen hinaus konnten auf der Mikro-Ebene bei einzelnen Akteuren identifiziert werden. So gibt es einige Lehrkräfte, die für die herausfordernde Unterrichtssituation in großen, heterogenen Klassen mit mangelhafter materieller Ausstattung eigene innovative Unterrichtsmethoden und Präsentationsform entwickeln oder einzelne Kinder nach der Unterrichtszeit zusätzlich individuell fördern. Einen weiteren Erfolgsfaktor bilden die sogenannten Mother bzw. Father Groups (lose organisierte Gruppen von Erwachsenen aus der die Schule umgebenden „Community“), die verantwortlich Schulspeisungsprogramme unterhalten oder ehrenamtlich Reparatur- oder Bauarbeiten an der Schule vornehmen. Mädchen und junge Frauen, die aufgrund einer frühen Heirat oder Schwangerschaft den Schulbesuch abgebrochen haben, werden durch Mother Groups ermutigt und unterstützt den Schulbesuch fortzusetzen.
Die Forschungsergebnisse zeigen, wie von verschiedenen Akteuren auf Mikro-Ebene trotz der herausfordernden Kontextbedingungen Handlungsansätze entwickelt werden, die insbesondere benachteiligte Schülerinnen und Schüler adressieren und deren Verbleib im Bildungssystem und Lernentwicklung fördern. Diese Maßnahmen sind aus der unmittelbaren Notwendigkeit im jeweiligen lokalen Kontext entstanden und summieren sich in der Wahrnehmung der Akteure nicht unter der Terminologie ‚inklusive Bildung‘. In ihren Effekten tragen diese Handlungsansätze jedoch bezogen auf die zentralen Dimensionen Zugang, Akzeptanz, Partizipation und Lern- und Leistungsentwicklung (Booth et al., 2000; Kalambouka et al., 2005) zu einer Umsetzung von inklusiver Bildung im genannten Sinne bei. Durch die Forschungsergebnisse wird deutlich, dass der Mikro-Ebene eine besondere Bedeutung in der Umsetzung von pädagogischen Innovationen wie der inklusiven Bildung zukommt.

5. Perspektiven in der Umsetzung von inklusiver Bildung

Rolff beschreibt die Einzelschule als die Gestaltungseinheit und den entscheidenden Motor von Schulentwicklung (2006); eine Wahrnehmung, die sich auch in den Forschungsergebnissen von Malawi widerspiegelt. Unter Bezugnahme auf verschiedene Implementationsstudien hat Rolff (2006, S. 43) vier Gründe aufgeführt, warum zentral verordnete Interventionsstrategien scheitern:

- Gesamtsystem-Strategien gehen irrtümlicherweise davon aus, dass eine Innovation in vergleichbarer Weise auf alle Schulen angewendet werden kann.
- Gesamtsystem-Strategien sehen die Lehrkräfte als ‚Konsumenten’ neuer Ideen und Produkte an. Dabei geht man fälschlicherweise davon aus, dass die Schulen die Lösungen, die auf der Systemebene vorbereitet wurden, einfach übernehmen und umsetzen.
- Gesamtsystemstrategien nehmen an, dass Innovationen zielgetreu zu implementieren sind. Studien haben jedoch gezeigt, dass Änderungen in der Schule komplexe politische, soziale und organisatorische Prozesse sind, die einer eigenen Dynamik folgen.
- Die Systemtheorie konnte zeigen: Wenn von außen interveniert wird, dann entscheiden die Einzelsysteme, in diesem Fall also die Schule selbst, ob und wie sie diese Interventionen verarbeiten.

Daraus ergibt sich die Notwendigkeit eines Mehrebenendiskurses über die Umsetzung von inklusiver Bildung in Malawi. Unter der Beteiligung aller Ebenen des Bildungssystems sollten Kriterien, wie eine inklusive Schule und ein inklusiver Unterricht aussehen sollen, bestimmt werden. Das Konzept von inklusiver Bildung muss klar gefasst werden. Übergeordnete Ziele, die im Falle von inklusiver Bildung unspezifisch und hoch sind, können so konkretisiert werden. Auf der Meso- und Mikro-Ebene muss eine Analyse der bestehenden

Bedingungen vorgenommen werden. Ein wesentlicher Schritt besteht dann in der Festlegung realistischer Ziele für Schulentwicklungsprozesse, die unter den gegebenen Bedingungen sinnvoll und praktikabel erscheinen.

Um überhöhte Ziele im Diskurs über die Umsetzung von inklusiver Bildung zu vermeiden, sollte Inklusion – nicht nur in Malawi – weniger als Ziel, d.h. als idealer Status, den es zu erreichen gilt, betrachtet werden, statt als Prozess der Reflexion und Schulentwicklung. Das Konzept der inklusiven Bildung kann als kritische Reflexionsfolie dienen, durch die die Heterogenität der Schülerinnen und Schüler anerkannt, wertgeschätzt und bewusst im Unterrichtsprozess eingesetzt wird. Inklusion als Aufgabe der Minimierung von Diskriminierung und Maximierung von Zugang, Akzeptanz, Partizipation und Lern- und Leistungsentwicklung setzt somit den Fokus auf das System. In diesem Verständnis kann Inklusion als eine zielführende Perspektive angesehen werden, auch für sogenannte Entwicklungsländer wie Malawi.

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[1] Die Kategorisierung von Ländern als „entwickelt“ oder „unter-entwickelt“ ist höchst problematisch. Daraus resultieren Fragen nach der Definition und Messung von „Entwicklung“ und der damit verbundenen Deutungshoheit. Terminologische Alternativen, um die Ungleichheiten zwischen Ländern der Welt zu beschreiben, sind ebenfalls ungenügend (Werning et al., i.E.). Daher wird weiterhin der Begriff „Entwicklungsland“ unter Berücksichtigung der damit verbundenen Einschränkungen genutzt.

[2] Im Auftrag des Bundesministeriums für wirtschaftliche Zusammenarbeit und Entwicklung (BMZ) führte die Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) in Kooperation mit dem Institut für Sonderpädagogik der Leibniz Universität Hannover und GOPA Consultants das Forschungsvorhaben

Inklusive Bildung durch.

[3] Mitglieder des Forschungsteams Guatemala: Marta Caballeros, Héctor Canto, Magaly Menéndez, Cristina Perdomo, Gerson Sontay. Mitglieder des Forschungsteams Malawi: Dr. Grace Mwinimudzi Chiuye, Anderson Chikumbutso Moyo, Evance Charlie, Dr. Elizabeth Tikondwe Kamchedzera, Lizzie Chiwaula. Internationale Forscherinnen und Forscher: Prof. Dr. Rolf Werning, Myriam Hummel, Prof. Alfredo Artiles, Prof. Petra Engelbrecht, Antje Rothe.

English Summary of

Hummel, M. (2016). Die Entwicklung inklusiver Bildung in Malawi: Zwischen makro-politischer Deklaration und lokaler Umsetzung. *Zeitschrift für Inklusion*. (1).

The Development of Inclusive Education in Malawi: Between Macro-political Declaration and Local Implementation

1 Introduction

Inclusive education has been described as a global agenda for as much as 20 years (Pijl, Meijer, & Herarty, 1997). Concepts and objectives of inclusive education seem to be directly imported by so-called developing countries[1]. This paper presents results of an international research project. These results are interpreted on the basis of the educational governance perspective in order to consider conditions of the implementation of inclusive education in the multilevel educational system of Malawi.

2 Research Design

The 14-month research project Research for Inclusive Education in International Cooperation aimed to gain an understanding of the development of inclusive education systems in Guatemala and Malawi. The aim was to show if, where, and how something can be changed to increase the probability of implementing inclusive education in Malawi and Guatemala.

The research design was qualitative and multi-perspective and tried to combine macro, meso, and micro levels. There is currently disagreement in the relevant discourse on the exact definition of the individual levels in education systems (see Altrichter & Maag Merki, 2010, p. 25). In this research project, the macro level was the national level, the meso level the level of district administration, and the micro level the individual school including the surrounding community.

[1] The categorisation of countries as "developed" or "under-developed"/"developing" is highly problematic. This raises questions about the definition and measurement of "development" and the associated sovereignty of interpretation. Terminological alternatives to describe the inequalities between countries of the world are also inadequate (Werning et al., 2016). Therefore, the term "developing country" is still used, taking into account the associated restrictions.

Various methods of data collection were used:

- Document analysis of country-specific documents such as national legislation, policy papers, and strategies as well as practical papers (Wolff, 2008);
- Focus group discussions (Lamnek, 1998) and problem-oriented interviews (Witzel & Reiter, 2012) with experts from different interest groups at the macro level;
- Problem-centred interviews at the meso level with school administration staff and experts from non-governmental organisations in the districts of the case studies;
- Instrumental case studies (Stake, 2005) in selected schools and their surrounding communities, consisting of participatory observations, interviews, and group discussions with students, parents, teachers, headmasters, and significant adults outside school.

Following Flick's thematic coding (1996; 2004) and using Strauss' open coding (1994; Strauss & Corbin, 1996), the group discussions, interviews, observations, and field notes were analyzed using QDA software.

The research project was carried out in the two study countries Malawi and Guatemala. This article presents the results of research in Malawi from a governance-theoretical perspective. The presentation and consolidation of the results of both countries would go beyond this framework and take place elsewhere with a different focus (Werning et al., 2016).

Malawi is a relatively small nation in southern Africa in terms of population and size. The country achieved independence from Great Britain by predominantly peaceful means in 1964 (Dickovick, 2014). Malawi ranks 174th out of a total of 187 countries in the United Nations Development Programme (2014, p. 159ff) making it among the poorest countries in the world. Malawi is an agricultural country with a very high proportion of its population living in rural areas. The population is composed of different ethnic groups that speak at least nine different languages (Dickovick, 2014). In Malawi, primary school lasts eight years. School fees were abolished in state schools in 1994, resulting in an enormous increase in enrolment rates (Inoue & Oketch, 2008). As in the rest of Sub-Saharan Africa, a high drop-out rate is a major problem in the education sector: only 31% of first-year school attendees remain in school up to grade eight (Ministry of Education, Science and Technology, 2013, p. 21).

3 Inclusive Education in the Multilevel System: A Theoretical Contextualisation

The perspective of educational governance considers complex social systems, including the educational system of a particular country, as multi-level systems and deals in particular with questions of coordination between the system levels (Altrichter & Maag Merki, 2010, p. 24f). Focusing on the coordination of action between different actors at (horizontal) and between (vertical) different levels represents a fundamental research approach in governance research. The concept of the multi-level system makes it possible "to design an analytical framework related to actors and institutions with which interdependence, interdependence management, and interdependence management of the actors can be studied" (Kussau & Brüsemeister, 2007, p. 32; own translation).

Consequently, inclusive education is also implemented at the various levels of the education system. The actors at each level develop their own perspectives for action and options for action. On the one hand, each level "looks upwards", which includes specific guidelines, regulations, and expectations; on the other hand, each level looks at the subordinate level in order to anticipate specific effects of its own actions. Specifications are therefore not simply adopted at any level. Rather, each level adapts the specifications of the next higher level and actively adjusts them to its own context conditions. The concept of recontextualization (Fend, 2008, p. 26) thus emphasizes that specific perspectives for action arise at the levels - depending on the respective environmental conditions - which are based on divergent logic of action, sets of values, "languages" and priorities of the respective level (Altrichter & Maag Merki 2010, p. 25) and bring with them specific competencies, instruments of action, responsibilities, and responsibilities.

4 Presentation of Selected Research Results from Malawi

The Republic of Malawi has signed and ratified all relevant UN conventions such as the Convention on the Rights of the Child and the Convention on the Rights of Persons with Disabilities (United Nations, 1989; United Nations, 2006). The document analysis has shown that the legislative conditions in Malawi regulate the right to education for all and thus provide an adequate framework for the implementation of inclusive education. Furthermore, the relevant policy papers show an understanding of different existing dimensions of disadvantage, primarily in relation to access to formal education.

Furthermore, the analysis of the Malawian policy papers shows that there is an inconsistent and unclear concept of inclusive education (Research for Inclusive Education in International Cooperation, 2015). The term is used in several papers, but it usually describes a traditional understanding that refers to a medical-deficiency model of disability. Most of the implementation measures mentioned are aimed at people with physical disabilities, deafness, and blindness and primarily include the provision of aids (Ministry of Education, 2009, p. 8). An understanding of different dimensions of disadvantage - beyond disability and special educational needs - that can lead to exclusion in relation to formal education becomes clear in the policy papers, but these aspects are not conceptualized as part of inclusive education. The focus group discussions conducted with various macro level actors show that the understanding of inclusive education also varies greatly between the different participants in the study.

The re-contextualization of the international discourse on inclusive education takes place at the macro-political level in Malawi, primarily in a terminological manner. The technical terminology used at the international level is adopted without critical conceptual analysis, without adaptation to the national context, and without the definition of concrete steps for implementation at the subordinate levels. The efforts of national policy-makers could be seen as an attempt to meet international standards.

The macro level seems to be looking upwards to the international level rather than to the lower local levels. If the view of the macro level is directed downwards, it becomes clear that existing structures cannot simply be designed inclusively. It is clear to the actors that, for example, the resource situation makes a simple adaptation of inclusive education - which as an elaborate model places very high demands on schools - hardly possible.

The meso level is in a difficult situation in Malawi. On the one hand, the challenges are very demanding, because inclusive education places high demands on the schools. At the same time, the goals formulated at the macro level are rather unspecific and do not provide any concrete prospects for action at the lower levels. When the actors at the meso level look "down", they recognize the concrete difficulties at the local level. As they have little or no resources of their own, they can only stimulate and implement developments to a limited extent and remain in an administrative function. Although innovative approaches are sought in individual regions, these often fail because of an overwhelming scarcity of resources.

The actors at the micro level are confronted with many challenges. The overwhelming lack of resources (human, financial, material) is particularly evident in schools and affects the educational quality of all children in Malawi. According to the most recent statistics of the Malawian Ministry of Education, Science and Technology Malawi, average pupil-to-teacher ratio in primary school is currently 69:1 (2013, p. 19). The participatory observations of the study documented class sizes of up to 160 students. In addition, the classes in Malawi are characterised by a high degree of heterogeneity.

The barriers identified by the study are very similar at the different levels of the Malawian education system, and primarily include a diffuse and inconsistent understanding of inclusive education and an enormous scarcity of resources. The identified success factors and opportunities, however, vary vertically between the levels and also horizontally within the micro level. Some cases of innovative problem solving and an application far beyond the professional requirements could be identified on the micro level with individual actors.

Neither school administrators nor teachers can directly perform tasks "from above". Rather, they adapt, change, modify or negate requirements that they receive according to their own concretely existing or experienced conditions for action. School administrators and teachers are thus the "operative actors" in the education system (Fend, 2008, p. 34); their involvement in planning and decision-making processes is therefore an important aspect of securing innovations in the education system. The research results make it clear that the micro level is of particular importance in the implementation of pedagogical innovations such as inclusive education.

5 Perspectives on the Implementation of Inclusive Education

Rolff describes the individual school as the major unit and the decisive engine of school development (2006), a perception that is also reflected in the research results of Malawi. Referring to various implementation studies, Rolff (2006, p. 43) has listed four reasons why centrally prescribed intervention strategies fail:

- Overall system strategies erroneously assume that an innovation can be applied in a comparable manner to all schools.
- Overall system strategies consider teachers as "consumers" of new ideas and products. It is mistakenly assumed that the schools simply adopt and implement the solutions prepared at the system level.

- Overall system strategies assume that innovations must be implemented in a targeted manner. Studies have shown, however, that changes in schools are complex political, social, and organisational processes that follow their own dynamics.
- System theory has shown that when interventions are made from outside, the individual systems, in this case the school itself, decide whether and how they process these interventions.

Hence, the need for a multi-level discourse on the implementation of inclusive education in Malawi becomes striking. With the participation of all levels of the education system, criteria should be defined as to what an inclusive school and inclusive education should look like. Overarching goals that are unspecific and high in the case of inclusive education can thus be clarified. At the meso and micro level, an analysis of the existing conditions must be carried out. An essential step will then be to set realistic goals for school development processes that appear meaningful and practicable under the given conditions.

In order to avoid excessive goals in the discourse on the implementation of inclusive education, inclusion should be regarded less as an objective, i.e. as the ideal status to be achieved, than as a process of reflection and school development. The concept of inclusive education can serve as a critical reflection foil through which the heterogeneity of the pupils is recognised, valued, and consciously used in the learning and teaching process. In this understanding, inclusion can be seen as an effective perspective, even for so-called developing countries such as Malawi.

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Myriam Hummel/Rolf Werning

Inclusive Education: "Same same but Different". Examples from Guatemala and Malawi

Abstract
Inclusive education is a global paradigm implemented across a range of different local contexts. Inclusion is a manifold concept with several and ambiguous meanings. This article is based on a yearlong research project in Guatemala and Malawi and is exploring the question: What are the specifics of inclusive education in so-called developing countries at the example of Guatemala and Malawi. After a theoretical embedding we are presenting the research results on the above mentioned question. The results bring forth tensions in the concept and implementation of inclusive education.

Keywords: *Inclusive education, developing countries, Guatemala, Malawi*

Zusammenfassung
Inklusive Bildung ist zu einem globalen Paradigma geworden, das in unterschiedlichen lokalen Kontexten umgesetzt wird. Das Konzept Inklusion ist vielschichtig und ist in unterschiedlichen Definitionen gefasst. Dieser Artikel basiert auf einem einjährigen Forschungsprojekt in Guatemala und Malawi und untersucht die Forschungsfragestellung, welches die Spezifika von inklusiver Bildung in sogenannten Entwicklungsländern am Beispiel von Guatemala und Malawi sind. Nach einer theoretischen Einbettung werden die Forschungsergebnisse dargestellt. Durch die Ergebnisse werden Spannungsfelder im Konzept und in der Umsetzung von inklusiver Bildung deutlich.

Schlüsselworte: *Inklusive Bildung, Entwicklungsländer, Guatemala, Malawi*

Introduction: Notions of inclusion

Inclusion is a manifold concept with several and ambiguous meanings. Artiles and Dyson describe inclusion as "slippery concept" that means different things in different systemic, socio-economic and cultural contexts (2005, p. 43). This is explicitly true for different regions in the world, and there are diverse differences in implications between so-called developed and developing countries[1] (Srivastava, de Boer & Pijl, 2013; Armstrong, Armstrong & Spandagou, 2011). In the overall ambivalence and plurality of notions of the concept inclusion, Ainscow at al. offer a typology of the notions of inclusion (2006, pp. 15):

- inclusion as a concern with disabled students and others categorized as 'having special educational needs': this understanding is often centred around constructions of individual defects and the question of placement;
- inclusion as a response to disciplinary exclusion: this understanding targets students temporary or permanently excluded from schools due to 'bad behaviour';
- inclusion in relation to all groups seen as being vulnerable to exclusion: an increasing trend to work with this notion of inclusion can be observed and is often described as 'broader perspective';
- inclusion as developing the school for all: this notion is reflected in developments to abolish the allocation of students to different schools according to their attainment; according to the authors this notion is about "a mutually sustaining relationship between schools and communities that recognizes and values diversity" (ibid., p. 21);
- inclusion as 'Education for All': this notion has developed from global targets primarily focusing on participation in education in developing countries;
- inclusion as a principled approach to education and society: this approach is characterized by being concerned with all children and youth in schools and stresses the never-ending process of implementing inclusion.

This typology helps to understand different approaches to inclusion and the ambiguity that comes with it. Another categorization of the concept of inclusion used in research is provided by Göransson and Nilholm (2014), who identified four categories in a hierarchical relation. Without presenting them here in detail, it can be stated that the four categories are roughly compatible to the typology of Ainscow et al. and that they range from a definition concerned with placement to a definition looking at community development. Given the fact that the outlined plurality of notions is presented and elaborated mainly by authors from so-called developed countries, it appears worthwhile to consider the constructions and notions of inclusion in so-called developing countries and the specifics that come along with the example of Guatemala and Malawi.

In the following, we will explore the question of what specific characteristics define the understanding and implementation of inclusive education in developing countries like

Malawi and Guatemala. In doing so, we will draw on the results from our one-year research project.

Research project

Background: refie project

The Research for Inclusive Education in International Cooperation (refie) project[2] was conducted between 12/2013–02/2015 in the two countries Guatemala and Malawi. Teams of national researchers implemented the qualitative, multi-perspective design in close cooperation with an international research team.[3] This publication focuses on one aspect of the overall research project. The comprehensive research results on success factors and barriers in the implementation of an inclusive education system in Guatemala and Malawi and notions of the concept of inclusion in both countries are presented at Werning et al. (2016).

Research countries

The fact that both Malawi and Guatemala are partner countries of the German development cooperation with regards to the education sector and the wish to have countries from different continents in the research project contributed to the selection of Guatemala and Malawi as reference countries by the contracting authority, Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH. Malawi is a landlocked country in Southern Africa which, compared to its neighbouring countries, is relatively small in terms of population and area. Ranked 174 out of 187 countries on the 2014 Human Development Index (United Nations Development Programme, 2014, pp. 159), Malawi is one of the world's poorest countries. It is a primarily agriculture-based economy with a largely rural population. The population comprises various ethnic groups with at least nine different home languages (Dickovick, 2014). In Malawi, a full cycle of primary education takes eight years (World Bank, 2010, p. 13; Ministry of Education, Science and Technology, 2015, p. 6). In its state-run primary schools, school fees were abolished in 1994, which led to an enormous increase in enrolment rates ever since (Inoue & Oketch, 2008). As in the rest of Sub-Saharan Africa, school dropout is a major issue: 64.5 % of students enrolled in the first grade (Standard 1) stay in school until Standard 5 and only 32 % of the age cohort stay in school until Standard 8 (Ministry of Education, Science and Technology, 2015, pp. 49).

Guatemala is a Central American country with a history of armed conflicts, the most recent of which lasted 36 years (1960–1996). Major causes of tension are inequity in the distribution of assets and capital, especially the distribution of land, and the discrimination of indigenous peoples (UNICEF, 2015). Guatemala ranks 125th on the Human Development Index and is thus classified as a country with "medium human development" (United Nations Development Programme, 2014). 40 % of Guatemalans identify themselves as indigenous people. There are 24 languages in the country, 21 of which are Mayan (Instituto Nacional de Estadística de la República de Guatemala, 2015a). A recent national survey indicates that 51 % of the population is younger than 20 years old (Instituto Nacional de Estadística de la República de Guatemala, 2015b). 59 % of Guatemala's primary schools are monolingual, with Spanish as the only language of instruction (Dirección de Planificación Educativa, 2014). Primary Education in Guatemala takes six years and is completed by 97 % of the students (Ministerio de Educación, 2013). 21 % of students in primary education are over-aged[4] with a higher proportion of male students (23 %) than female students (19 %) (ibid.).

Both Guatemala and Malawi have signed and ratified the UN Convention on the Rights of the Child (United Nations Treaty Collection, n.d. a) and the UN Convention on the Rights of Persons with Disabilities (United Nations Treaty Collection, n.d. b).

Malawi and Guatemala have little in common despite their similar population size and although both are partner countries of German development cooperation. Malawi is in general a poor country; most of its population lives in extreme poverty. Guatemala is categorized as in average a country with medium human development, but there are enormous gaps between its rich and poor, indigenous and non-indigenous people – just to name a few. Therefore, it comes without saying that the described research results do not always apply equally to both countries. The results presented here are valid for both countries, but some aspects can be more distinct for one country than the other.

Research question and methodology

The research question we want to elaborate here is what specific characteristics there are in the understanding and implementation of inclusive education in the developing countries Malawi and Guatemala.

Data was collected at all levels of their educational systems through problem-centred interviews (Witzel & Reiter, 2012), focus group discussions (Lamnek, 1998) and participatory observations with different stakeholders of the educational system. Additionally, a document analysis (Wolff, 2008) focusing on existing country-specific research results, policy papers and practice papers was conducted for each country. The transcribed data was analyzed with thematic coding (Flick, 1996; 2004) and open coding (Strauss, 1994; Strauss & Corbin, 1996).

Research results

Inclusive education and special needs education

Our document analysis revealed the lack of a unanimous concept of inclusive education in the educational policy framework of Guatemala and Malawi. In both countries, the term inclusive education is used in relevant policy documents which, however, often reflect a traditional medical deficit approach towards providing special needs education. For example, many of the strategies to be implemented with regards to special needs learners mainly target students with sensory or motor impairment. Both national policy frameworks acknowledge various differences that can lead to marginalization or exclusion, but do not contain provisions addressing these target groups under the concept of inclusion. The notion of inclusion in the educational policy framework in Guatemala and Malawi is mainly the one Ainscow et al. describe as "inclusion as a concern with disabled students and others categorized as 'having special educational needs'" (Ainscow, Booth & Dyson, 2006, p. 15). In the newly released National Strategy on Inclusive Education of Malawi this momentum is also perceived and

reflected by the authors, as it is stated that "the concept of inclusive education is often linked with children with disabilities in mainstream schools. However, the concept of inclusive education has a broader meaning and does not only refer to a single group of learners in an education system" (Ministry of Education, Science and Technology, 2016, p. 12).

Furthermore, the study showed that, there is neither a commonly shared concept of inclusive education among the major stakeholders in Malawi nor in Guatemala. Their perceptions range from a narrow understanding of disability inclusion to a broad understanding comprising the minimization of discrimination and the maximization of social participation and educational opportunities. The following quote from a Malawian educational administration authority shows how special needs learners are equated with learners with sensory or motor disabilities and how inclusive education is understood mainly as disability inclusion:

"The special needs learners, because they are of different disabilities – and others do not have the opportunity to see and we have others who have got hearing problems, others have got difficulties in mobility – we need to co-opt them into the system" (District Education Manager in a rural area of Malawi).

Conversely, another administration authority at the same system level in Malawi had a broader understanding of inclusive education, detached from a target group-specific approach and oriented towards reducing barriers to learning for all learners:

"We cannot talk of productive school environment looking at only a particular group of people, but rather its education for each and every one, so that whatsoever is taking place in productive school environment, we have to involve each and every one in whatever status one is, whatever condition one is in. We have to involve each and every one" (District Health and Nutrition Coordinator in a rural area of Malawi).

Drawing back on the above introduced typology of inclusion, this notion can be described as "Inclusion as developing the school for all" (Ainscow et al., 2006, p. 15). Another orientation was found in Guatemala where, traditionally, certain marginalized target groups have been addressed, resulting in the omission of others. This results in discussions about different target groups and considers inclusion in relation to all groups seen as being vulnerable to exclusion:

"But it is important to go beyond the indigenous and rural subject, because nowadays we are talking about a school that does not accept poor children who come from marginal areas or that turn these children into victims or unwanted persons within the school" (Academic, Guatemala).

Referring to the typology of inclusion it becomes apparent that no common understanding of the concept of inclusive education is shared between relevant stakeholders in education between all levels of either country. As the understanding of inclusive education in the main policy documents in Guatemala and Malawi used to be mainly linked to learners with special educational needs and disabilities, a broader variety of understandings of inclusive education is evident in the perspective of the stakeholders. In the currently developed National Strategy on Inclusive Education in Malawi this divergence is named for the first time and shows a critical appraisal of the used concepts of inclusion. The divergence in the notions of inclusive education is not unique for Guatemala and Malawi. As Göransson and Nilholm (2014) and Ainscow et al. (2006) have outlined, different definitions of inclusion are also existent in the European context.

Inclusive education and inclusive society

As mentioned above, Guatemala is a country with a high proportion of indigenous people and a history of discrimination of indigenous groups. When addressing the topic of education of the indigenous population in Guatemala, the topics of home language and culture also become relevant. Study participants showed resistance towards using the concept of inclusive education in relation to indigenous population:

"So I think it is complicated to mingle the issue of disability with the issue of indigenous peoples, who are a majority in this country … So I believe it is extremely complicated to mingle the ethnic theme with the disability theme. Because these are completely different issues; one is a problem related to the structural racism of this country, resulting in having the indigenous populations outside public services, in particular education, which is one of the basic structures of our country, sadly. So addressing this as a matter of exclusion seems, a lot, complicated to me. I would never mix the two" (Academic, Guatemala).

This statement shows the understanding of inclusion as a concern with disabled students and others categorized as "having special educational needs" (Ainscow et al., 2006, p. 15). In this perception inclusion is not concerned with indigenous peoples and not aiming at developing a school for all or even an inclusive society. Several stakeholders' perception of inclusive education was linked or limited to disability and therefore incompatible with a discourse on inclusion of indigenous population into the education system. This makes it clear that unsolved societal conflicts and unrealized social inclusion issues have a direct impact on the implementation of inclusion in the education sector. A segregated society renders inclusive education ad absurdum.

The topic of indigenous people in Guatemala fundamentally challenges some presuppositions of the international discourse on inclusion. In Guatemala, people raised questions of whether inclusion is desirable for everyone and whether it can collide with human rights issues:

"The concept of inclusive education has shades. When introducing for example the topic of inclusive education and indigenous peoples, there are deterrents, because here we have individual and collective rights, language rights. Up to what point can I use inclusion? There could be a certain desire for autonomy: I do not want to be included or integrated. I want to have my own system. The concept of inclusion could clash with the issue of rights" (Representative of an international organization, Guatemala).

Certain groups (such as the indigenous groups in this case) might demand a 'right to exclusion' if, for instance, they prefer to have their own educational system with cultural-specific content and language. In any case, the topic of indigenous people in Guatemala reveals drastically how inclusion in education cannot be considered apart from a country's profound societal structure:

"Being a racist country, inclusion begins in part by understanding the country's cultural diversity. Including someone different from my culture, my language, my way of thinking and of behaving, means that I need to respect, it means I need to be tolerant, but the National Education System has done the opposite. It has been an eminently excluding education system" (Leader of Teachers Union, Guatemala).

These aspects were explicitly located in Guatemala – a country where most of the population identifies itself as indigenous people who historically experienced many repressions; another group is the co-called 'Ladinos', who are of Spanish descent. The population of Malawi is also composed of various ethnic groups who to some extent speak different languages. However, our research results from Malawi did not show the above-mentioned aspects that we identified in Guatemala.

Formal education and living environment

The relation between formal education and the respective living environment became relevant in both countries. However, this aspect has different impacts in the two countries. Our study revealed that, in both countries, formal education is often only partially relevant and suitable given the living environment of the majority of the population. Especially in Guatemala, the contents of formal education seemed only partially or to a certain extent relevant to the living environment of the students, as displayed in the following quote:

"The parents say: 'What I want is for my child to learn to add, subtract, multiply and divide, because that will already generate an income since I will be able to put him to work in a store'" (Departmental Officer, Guatemala).

One explanation might be the divergence of expectations from realizations regarding the benefits of formal education for entering the labour market. When formal education doesn't keep the promise of improving someone's living conditions, it is losing its value in the perspective of some students and parents:

"Sometimes parents don't want their children to study because of the work situation. Because there isn't much work, they conclude their studies and there is no work; they graduate and there is no work; even some are professionals and there is no work. Only a few are working and the majority just stays at home" (Local leader, Guatemala).

The implied promise of formal education is to improve a person's living conditions and to enable his or her participation in society. Inclusive education reinforces the latter as it aims at nobody being excluded from societal participation. If formal education itself does not keep these promises, how could inclusive education?

In Malawi traditional orientations and practices can compete with the requirements of formal education. In certain regions in Malawi traditional initiation ceremonies are influencing the children's attendance at school. These initiation ceremonies may last several days or weeks and are leading to school absence. Initiation ceremonies are of relevance for both boys and girls. As the analysis shows, though, consequences differ according to gender. Girls are more likely to drop out of school after attending these rites, as they are encouraged to be sexual active with the results of early pregnancies and early marriages:

"Especially when they go to initiation ceremonies. I don't know what is going on there. But after coming out of initiation ceremonies, they drop out of school. Some are impregnated and get into marriage and the like" (Vulnerable children coordinator in a rural area, Malawi).

One consequence of initiation ceremonies for boys can be rebellious behaviour after their return to school. They are more likely to get into conflict with teachers as they perceive their role differently after being initiated, bearing consequences for their participation:

When children go for 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 a bad behaviour … so such beliefs affect children because they develop that feeling that they are adults and a teacher cannot do anything to them. (Teacher in a rural area, Malawi)

In these cases, traditional structures compete with the value of formal education.

Presence of donor organizations

As a consequence of low national income, countries like Guatemala and Malawi receive financial and technical support from bi- and multilateral donors. The presence of donor agencies funded through organizations or other governments is characteristic of developing countries and has its own dynamics. The overarching aim of governmental development cooperation is to support national institutions. However, this occurs under the influence of financial power intentions and with the priorities of international agencies, which inevitably have their influence on national processes. In the perspective of many stakeholders in both countries the presence of several donor agencies come with demarcation and competition, as stated in the following:

"What I would like to say is to avoid little islands of success in the big ocean of failure: [name of organization] is signing its own success story, [name of organization] its own success story in one little district. I call this islands of success by attribution to each agency, but in a big ocean of failure." (National Stakeholder, Malawi).

Furthermore, donor agencies have their own internal logics and procedures. Most interventions have a fixed and medium-term timeline. However, national developments such as the development of the education sector happen on a different time scale. As a result, development cooperation projects might be leaving gaps after project termination, as displayed in the following quote:

"However, I regret these [initiatives by donor agencies] are all temporary, ok, because their scope is large and the public sector and public resources can't be compared to the resources brought by organizations, and when these are cut or they conclude, the people who were working with them stay, the demand remains" (Departmental Officer, Guatemala).

Donor agencies run the risk of functioning like a repair service, working on a short- or medium-term intervention timelines in the most urgent issues. The presence of several donor agencies who might be interested in distinguishing themselves can add to this problem and lead to fragmented approaches in the lack of a coherent joint strategy.

"There is a little bit of working silos approach than across the sector, everyone protecting their turf: [name of organization] doing their own thing, [name of organization] doing

their own Early Grade Reading, [name of organization] doing their own … thing. How can we come at the table and come up with one inclusive education strategy for Malawi, where everyone contributes not everyone protecting their own little turf?" (National Stakeholder, Malawi).

Discussion and outlook

Before reflecting the specifics of inclusive education in the two countries, it is worth underscoring that the global movement of inclusive education has different roots in developed and developing countries. The development of inclusive education in developed countries can be traced back to the 1960s and 70s (Artiles, Kozleski, Dorn & Christensen, 2006, p. 69) and has mainly emerged from a critique of the placement of certain learners outside the mainstream. Inclusive education in developing countries has been promoted through the Education for All agenda which firstly and primarily focussed on increasing access to school education. 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. From this genesis it can be stated that – breaking it down – inclusive education in developed countries was originally about being educated in a special system or the regular system whereas inclusive education in developing countries often is a question of being in school or out of school.

Our research results revealed several tensions regarding the concept and implementation of inclusive education in Guatemala and Malawi. The various tensions are outlined below.

- *Tension between special needs education and inclusive education:* This tension in itself is not specific for developing countries but carrying an own characteristic in developing countries as the experiences and the discourse from developed countries spill over to developing countries with a shorter history in inclusive education.
- *Tension between human rights and inclusion*: In many discourses, human rights form a thrust towards the development of inclusive education (Dyson 1999). However, in Guatemala a 'right to exclusion' is demanded by indigenous people. The question whether human rights can form tension towards inclusive education might be discussed controversially.
- *Tension between traditional values and inclusive education:* Especially in Malawi, it became evident that in certain regions, traditional values do not match the requirements of formal and inclusive education and, consequently, there are two different competing orientations. In Guatemala and Malawi, we also saw how the promise of education of economic prosperity and social participation remains unfulfilled. Therefore, inclusive education which takes up the promise especially of social inclusion becomes elusive.
- *Tension between fragmented interventions and holistic development*: The presence of different donor agencies fortifies fragmented interventions whereas inclusive education is based on a philosophy of a comprehensive education. Inclusion raises fundamental questions regarding the development of the educational system and educational institutions, which cannot be solved by short-sighted stopgap measures. However, the conditions in poor countries often impede long-term development.

Tensions as a characteristic of pedagogical practice have been widely discussed (Helsper, 1996) in developed countries. It is even argued that tensions are a specific phenomenon with regard to inclusive education (Slee, 2009). Such tensions can be considered as an inevitable part of pedagogical practice and cannot simply be dissolved. Inclusive education might highlight and intensify difficulties and tensions which have been present throughout. We maintain that the contextualization of inclusive education should take existing tensions into account.

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Notes

1 Categorizing countries as 'developed', 'developing' or 'under-developed' is highly problematic. The question is: What is meant by 'development' and who is judging the progress of this development? Nevertheless, because the terminological alternatives (such as countries of the Global South/North) for describing inequalities between countries of the world are also unsatisfactory we still use the debatable term 'developing/developed countries' while acknowledging the limitations of this classification (see also Engelbrecht/Artiles 2016).

2 Research project implemented on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ), as mandated by Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ), Leibniz Universität Hannover, the Institute of Education for Special Needs, and GOPA Consultants.

3 Members of the Guatemala research team: Marta Caballeros, Héctor Canto, Magaly Menéndez, Cristina Perdomo, Gerson Sontay. Members of the Malawi research team: Dr. Grace Mwinimudzi Chiuye, Anderson Chikumbutso Moyo, Evance Charlie, Dr. Elizabeth Tikondwe Kamchedzera, Lizzie Chiwaula. International researchers: Prof. Dr. Rolf Werning, Myriam Hummel, Prof. Petra Engelbrecht, Prof. Alfredo Artiles, Antje Rothe.

4 Over-aged students are defined by the Guatemalan Ministry of Education as those who are two or more years older than the age regarded as the ideal for the grade (Ministerio de Educación, 2013).

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‘Inclusion and Inclusions’: Discourses on Inclusive Education in Southern Africa

A variety of definitions for the term inclusion exists. It can be argued that this conceptual ambiguity stems from different discourses on the rationale for and the realisation of inclusion. As inclusion evolved to a global matter implemented in many educational systems worldwide, it becomes worthwhile to look at spatial discourses others than those in the global North. This paper applies a Sociology of Knowledge Approach to Discourse and presents a systematic literature analysis on the academic discourses on inclusion in southern Africa. 66 publications by authors with an institutional affiliation within southern Africa were analysed. The findings indicate that in some aspects own national or regional discourses emerged, while in other aspects Northern discourses are dominant and replicated with little contextualization.

Keywords: inclusive education; discourse research; systemic literature review; Southern Africa

Introduction

The concept of inclusive education, borne by international declarations such as the Salamanca Statement (UNESCO 1994) and the UN Convention on the Rights of Persons with Disabilities (UN 2006), has been referred to as a global agenda (Pijl, Meijer, and Herarty 1997) or international movement (Artiles and Dyson 2005, 43) by scholars within the past decades. At the same time, scholars recognise that currently there are many divergent definitions on inclusive education in use (Artiles, Kozleski, Dorn, and Christensen 2006; Ainscow, Booth, and Dyson 2006; Slee 2011). Furthermore, different discourses unveil various perspectives and questions regarding inclusive education (Dyson 1999). It is mainly scholars in Northern America, Europe and Australasia – the so-called global North – who are leading these discourses and are covering practices in the very same regions.

As inclusive education is currently implemented in many educational systems around the globe, it becomes relevant to pay attention to definitions and discourses in the global South and further to consider how these different spatial discourses are interwoven or are influencing each other.

Therefore, my intention with this paper is to outline the main strands on the academic discourse on inclusive education in southern Africa through a systematic literature review. After a description of the theoretical framework for this discourse research, an overview on present inclusion discourses is provided. In the following, the research method for a literature review on academic publications on inclusive education in the southern African region including the search criteria is outlined. The results of this analysis are presented under the following foci: the results on the rationale for inclusive education, definitions of inclusive education in the southern African discourses and relations of discourses.

Research Framework

The following analysis applies a discourse research perspective which is based on the social constructivist approach of Berger and Luckmann (1966). Keller (2001) enhances this approach with foundations on discourse theories outlined by Foucault, as it adds the perspective on institutional production, objectivation and dissemination of knowledge and is thereafter named the Sociology of Knowledge Approach to Discourse (SKAD) (Keller 2001). 'SKAD is then concerned with reconstructing processes of social construction, objectivization, communication and legitimization of meaning structures (i.e. structures of interpretation and action) at the level of institutions and organizations or social (collective) actors, and with analysing the social effects of such processes.' (Keller 2013, 61-62). Discourses in the Foucaultian meaning are 'practices that

systematically form the objects of which they speak' (Foucault 2010, 49). Therefore, the notion(s) of inclusion are constructed through discourses and the implementation of inclusion is strongly influenced by these discourses.

Through the academic discourses in journals, knowledge is produced, objectivated and disseminated. Keller puts focus on institutions and instances that distinguish between legitimate and illegitimate speakers and therefore decide on inclusion or exclusion of speakers in a certain discourse (Keller 2001; Foucault 1978). In this paper, these instances are the journals (represented by editors and reviewers) and databases, which decide upon the inclusion or exclusion of journals.

Discourses on Inclusion

Numerous scholars have repeatedly emphasised the 'multiple meanings' (Artiles et al. 2006, 69) of the term inclusion, which leads to great uncertainty and confusion in the field (e.g. Ainscow, Booth, and Dyson 2006; Armstrong, Armstrong, and Spandagou 2011; Slee 2011). Inclusion and inclusive education are both described as 'a venerable idea' (Artiles and Kozleski 2016, 1), 'a fraught issue' (Hardy and Woodcock 2015, 141) and as 'highly contestable' (Armstrong, Armstrong, and Spandagou 2011, 29). With the purpose to demonstrate the variety of different definitions in use and their distinctions, several scholars presented typologies of ways of thinking about inclusion (Ainscow, Booth and Dyson 2006; Göransson and Nilholm 2014).

Given this variety of definitions that clearly indicate an ambiguity of the concept of inclusive education in itself, Dyson points out that it could be appropriate to talk about 'inclusions' (1999, 36). He also points out that 'these ambiguities arise from different discourses, through which different theoretical notions of inclusion are

constructed' (ebd.). With the aim of gaining clarity and creating possibilities for a debate between different 'inclusions,' he is laying out different discourses on inclusion.

Most scholars refer to the categorisation of Dyson (1999) when talking about different discourses in inclusive education. As this categorisation forms both the impulse and the foundation for this work, it is outlined in the following. The rationale for inclusion is carried by two different discourses: the rights and ethics discourse[1] and the efficacy discourse. The rights and ethics discourse looks at the interrelation of inclusion and social justice. Placement in special education, which, in this discourse, is contrary to inclusion, is considered a legitimisation of the treatment of learners with disabilities as deviant and does not raise any necessity in social restructuring. The efficacy discourse is discussing the question of whether inclusive schools are more effective educationally and cost-efficient compared to segregated special education. The other dimension in which the discourses on inclusive education can be categorised deals with the realisation of inclusive education. Whereas in the political discourse, the transition from a segregated to an inclusive system is considered a political struggle which needs to be fought for, the pragmatic discourse is concerned with what inclusive education looks like in practice and what measures have to be taken at different levels of policy-making. Dyson does not consider these discourses competing paradigms but rather as 'poles along a single dimension, since they frequently interact' (1999, 39).

Discourses on inclusive education are led in different spatial contexts but also within and between different stakeholder groups. In illustrating the different discourses,

[1] Dyson is using the term in the singular. Mills, who is basing her work on the Foucaultian meaning of discourse/s, is distinguishing between 'discourse as a whole, which is the set of rules and procedures for the production of particular discourses' and discourses which are 'sets of sanctioned statements which have some institutionalised force' (Mills 2004, 55). The boundaries of a specific discourse are usually very unclear. What Dyson describes as a discourse would therefore be called discourses in the Foucaultian tradition.

Dyson is referring to Skrtic (1991) and draws on a number of scholars from Northern America, Europe and Australasia. Without explicitly saying so, he hence is describing the discourses on inclusive education of the global North. Other scholars have analysed discourses on inclusion in policy (e.g. Hardy and Woodcock 2015; Liasidou 2008), led by parents and educational professionals (e.g. Dunne 2009; Gunnþórsdóttir and Jóhannesson 2014; Purdue, Ballard, and MacArthur 2001) and public discourses in newspapers (e.g. Connor and Ferri 2007). All of the above mentioned focused on specific regions in the global North.

The Development of Inclusion in Various Regional Contexts

As mentioned earlier, inclusion can be considered a global matter. When discussing inclusive education under this perspective, it needs to be emphasised that inclusive education has a different genesis in the different regions and countries of the world. In the global North the current discourses about inclusive education are based on a historic development transitioning from excluding students from formal education who were perceived as outside the norm to educating these students in special schools. This system of separation was eroded by integration initiatives, 'placing certain learners from separate special education settings in mainstream classes under certain conditions, but neither assume[s] that all learners have an unquestioned right to belong in a mainstream school and classroom' (Engelbrecht and Green 2017, 5). This assumption is challenged by an orientation towards inclusive education.

Other countries followed the lead of the global North and the global strive for inclusion got postulated in international documents like the Salamanca Statement (UNESCO 1994) and the UN Convention on the Rights of Persons with Disabilities (UN 2006), even though the historic development in these countries took its own path.

This results in Northern values, experiences and policies being transferred without conceptual understanding and adaptations to other contexts (Kalyanpur 2016).

As discourses create the notion of inclusion and scholarly work is also concerned with the implementation of inclusion in the global South (e.g. Engelbrecht and Artiles 2016; Srivastava, de Boer, and Pijl 2015; Singal and Muthukrishna 2014; Armstrong, Armstrong, and Spandagou 2011), it becomes worthwhile to take a closer look at discourses besides those stemming from the global North. Therefore, the object of analysis for this paper is the academic discourses on inclusive education in southern Africa as one specific region of the global South. The discourses on inclusion in the global South are also led by researchers from the global North, and as researchers collaborate and move internationally, it is not possible to draw a clear distinction between these discourses. Hence, the focus of this analysis is the discourses led by southern African scholars.

Positionality

In a study in which a White European researcher is analysing the discourses of Southern African researchers, the topic of positionality becomes essential. Even though no direct interaction and thereto resulting effects due to perceived status variables was part of this study, insider/outsider status and resulting power dynamics need to be addressed in such a design (Merriam et al. 2001). I perceive myself as being academically socialised in the global North and therefore mainly exposed to and forming part of the Northern academic discourses. Analysing the Southern African discourses and e.g., for this purpose formulating criteria about what constitutes the respective discourses, requires a critical reflection about my own position and its effects. The danger of scientific colonialism (Galtung cited in Lewis 1973, 584) especially needs to be addressed in a

study discussing Northern influence on Southern discourses. As this research is applying a social constructivist perspective as an epistemological approach, it is necessary to understand the findings and the resulting statements as constructions which by no means claim to be the 'only true reality'. Mishler (1990, 417) proposes to understand the validation of qualitative research results as a social construction of knowledge which results in the community of researchers evaluating the trustworthiness of research results. In my particular study the community of researchers is additionally in the role of study participants. I therefore presented intermediate results of this analysis at an academic conference in South Africa to the academic community to check the plausibility of the preliminary interpretations.

Research Question and Method of Data Analysis

This analysis looks at what kind of discourses on the rationale of inclusive education are held by scholars in the southern African region and what definitions on inclusion are applied. As the object of analysis in this paper is the academic discourses on inclusive education in southern Africa, a systematic literature review of publications in scholarly journals was performed (Hart 1998; Cooper 1988). A qualitative text analysis with open (Strauss 1994; Strauss and Corbin 1996) and thematic (Flick 2014, Gibbs 2007) coding was conducted.

Search Strategy

At first, pivotal terms need to be operationalised for the specific building of the corpus.

The region of Southern Africa is defined for the purpose of this analysis as the 15 member states of the Southern African Development Community SADC, namely: Angola, Botswana, Democratic Republic of Congo, Lesotho, Madagascar, Malawi,

Mauritius, Mozambique, Namibia, Seychelles, South Africa, Swaziland, Tanzania, Zambia, and Zimbabwe (SADC 2012).

The academic discourses in southern Africa are not able to be delineated from other discourses. Researchers move and exchange internationally, receive and cite across borders, and publish in international teams of authors or in international journals; therefore it is not possible to clearly demarcate spatial discourses. It is not the intention to nationalise or culturalise international scholarly work, but to focus on a certain under-represented region in order to gain an understanding about specifics and the relation of spatial discourses. The intention is not to compare places, but to compare discourses which are existing within socio-historic and spatial contexts. For the purpose of this analysis, publications with at least one author having an institutional affiliation within a southern African country are conceived a fragment of southern African discourses. This includes articles published both in journals based within the region and international journals. This is merely a working demarcation for the context of this analysis.

First, two different approaches were used to identify publications: using the search engine of ERIC database through ProQuest and a direct search in eight identified journals based in the region, namely Acta Academina, African Educational Research Journal, African Journal of Teacher Education, Critical Studies of Teaching and Learning, Perspectives in Education, South African Journal of Education, The African Symposium, and Zimbabwe Journal of Educational Research. Only one of the southern African journals (Perspectives in Education) is part of the ERIC database. Journal articles were included in the review which were published between 2006 and 2016[2] in

[2] A first search was conducted in September 2016. These results were updated regarding publications in 2016 in September 2017.

English[3]. The following search terms were combined: *inclusi** and each of the 15 southern African nations or *Africa*. This search produced 156 references in total; 127 results from the ERIC database and 29 from the southern African journals.

In a second step, the initial corpus was further examined and publications were excluded that did not meet the following criteria:

- Inclusive/inclusion as a keyword: It could be argued that publications with other keywords instead of inclusive/inclusion also belong to the discourses on inclusion. Yet through including other keywords, I would be the one to define the scope of inclusion. As this analysis intends to explore the definitions used by southern African scholars, only articles which were labeled by the authors themselves with the keywords inclusion/inclusive were included.
- Subject-relevance: Only articles referring to the field of education were considered relevant for this analysis.
- Institutional affiliation: For the purposes of this analysis it was required that at least one author had an institutional affiliation within a southern African country.

After excluding articles that did not meet all these criteria or were, despite intensive research, not available as full texts the final data corpus was sized down to 51 articles found in international journals through ERIC and 15 articles in southern African journals, summing up to 66 publications in total.

The criteria for the identification of the included publications and therefore the analysed fragments of the discourse are described in detail with the intent to provide

[3] As some of the included countries have other languages (de facto or de jure) than English, the exclusion of other languages clearly forms a limitation of the study.

plausibility. However, this should not be equated with a presumption that these fragments map the entire discourse. It is possible that further publications exist which did not meet the set criteria but can also be considered part of the discourse.

Description of the Data Corpus

The institutional affiliation of authors out of the 66 articles that form the final corpus for analysis is distributed as follows: South Africa (47), Botswana (7), Zimbabwe (4), Swaziland (2), Zambia (2), Lesotho (1), Malawi (1), Namibia (1), and Tanzania (1). With the above described criteria, no publications were found with authors with an institutional affiliation in Angola, Democratic Republic of Congo, Madagascar, Mauritius, Mozambique, or Seychelles. This needs to be considered in light of the fact that most of these countries have official languages other than English. This distribution shows that the vast majority of the southern African scholars participating in the inclusion discourses is affiliated with South Africa. The participation from scholars from other countries of the region is marginal or non-existent. 19 of the 66 articles were published by international teams of authors. Out of all these cases of international cooperation only one southern African country was represented and the international cooperation was a North-South-cooperation. A country-specific look at the findings can therefore provide a useful unit for comparison.

Central Findings

Rationale for Inclusion: Emergence of an Own South African Discourse

Dyson (1999) considers the discourses regarding ethics on the one side and efficacy on the other as two poles along the dimension rationale for inclusion. In the analysed corpus the discourse on rights and ethics is clearly represented stronger as the discourse

concerned with the educational effectiveness or cost-efficiency of inclusive schools. In most publications, human rights, social justice and equality form the foundation of the rationale for inclusion. Regarding the rights and ethics discourse a substantial difference between publications of South African scholars and publications of scholars from other southern African countries becomes visible. The South African inclusion discourses are characterised by a terminology connected to the keywords freedom, democracy and citizenship. The year 1994 forms a major milestone in both the international recognition and expansion of the concept of inclusive education (Salamanca Declaration) and the history of the South African nation (democratic election and the end of apartheid). In the following years the question of how to become a non-discriminatory, just and inclusive society became a central theme in South Africa. In many publications of this analysis, this historical connection between the development of inclusive education on the international agenda and the transition from apartheid to democracy in South Africa is emphasised.

> Researchers in South Africa […] describe how the establishment of inclusive education in South Africa has synchronized with the establishment of a democratic society with human dignity, freedom and equality entrenched in the South African Constitution since 1994. Inclusive education within the South African context has been promoted as the educational strategy most likely to contribute to a democratic and just society (Du Toit and Forlin 2009, 646).

The terminology in use demonstrates the interweavement between state development and the development of inclusive education in South Africa. This specific nexus becomes accentuated in a publication by Zembylas et al. (2009) in which through the example of four nations with a recent history of violence and collective trauma the dynamic interactions between reconciliation and inclusion are discussed.

The rights and ethics discourse in the other southern African countries is not coined by this particular terminology but is rather referring to the principles of access, participation and human rights. This follows the same line of argumentation but with a different emphasis. This discourse does not refer to any particular national historical, political or societal development. Authors from these countries refer in their argumentation solely to academic sources from the global North whereas South African authors quote either South African colleagues or sources from the global North. It can be summarised that due to its specific historical context the discourse on the rationale of inclusion in South Africa took on its own development path of adopting international discourses relating to the country's context. The discourses in the other southern African countries stay closely connected to the Northern discourses without a context-specific alteration.

Efficacy Discourse: Low Contextualisation

Eleven articles include references to the efficacy discourse. In one of them, the authors disagree with the argument that inclusive education is more cost-efficient and educationally effective (Urwick and Elliott 2010). Otukile-Mongwaketse, Mangope, and Kuyini (2016) name pros and cons regarding inclusion displaying that the argument of educational efficacy is used by advocates of both sides. The educational system developed under apartheid in South Africa is described as not only inequitable, but also as educationally ineffective (McKinney and Swartz 2016, Greyling 2009). Other authors who are referring to efficacy follow the argument of inclusion being more efficient. One reference used to support this argumentation (e.g. Walton 2011) is the Salamanca Statement – a normative proposition not supported by empirical evidence – in which it is stated that 'we believe and proclaim that […] they [regular schools with

inclusive orientation] provide an effective education to the majority of children and improve the efficiency and ultimately the cost-effectiveness of the entire education system' (UNESCO 1994, viii – ix). Other publications refer to empirical results, as in the following:

> Education inclusion is essential because it can enhance the academic achievement (Blackorby et al., 2005) and social skills of learners with barriers to learning, as well as facilitate understanding and empathy in typically developing learners (Bornman and Donohue 2013, 86).

In this example, the authors refer to a US-American longitudinal study on the achievements of elementary and middle school students with disabilities (Blackorby et al. 2005). Studies by PISA (OECD 2011) and Barber and Mourshed (2007) are cited as further empirical evidence to show that 'top performing schooling systems have also done well in including and educating potentially marginalised groups of students' (Malinen et al. 2013). Another strand of argumentation refers to the respective national policies of Botswana (Mukhopadhyay 2013) and South Africa (Daniels 2010) which name inclusive education as cost-efficient.

In a nutshell, the efficacy discourse by scholars from southern Africa draws on empirical results from the global North, the normative Salamanca Statement and national policy. Except for one publication (Engelbrecht et al. 2016) no article is referring to empirical evidence from one of the countries of southern Africa when contributing to the efficacy discourse. In the named publication the implementation of inclusive education in South Africa is analysed. Several empirical but also theoretical publications by South African scholars are referred to. The authors conclude that 'there is […] a clear and substantial gap between the idealistic conceptualisation of inclusive

education in South African policy documents and its implementation' (Engelbrecht et al. 2016, 532).

The question of efficiency, however, needs to be considered as a relational one. Dyson describes the (Northern) efficiency discourse as a juxtaposition of a segregated and an inclusive system and the evolvement of the inclusive system being based on a critique of a segregated special school system. As the historical development of school systems and in particular the role of special schools differs significantly between the global North and South, the relational question of which system is more effective carries different reference points in the respective contexts. Where empirical results from the global North are referred to, it is not made the subject of discussion if or how this empirical evidence is applicable for southern Africa. A relation between the efficacy discourse and the specific contextual factors of countries of southern Africa was created in two publications (Mukhopadhyay 2013; Walton 2011) through the argument that inclusive education is a cost-effective strategy to achieve developmental goals like Education For All and the Millennium Development Goals. Given the specific conditions of low national income in most of the southern African countries, it is surprising that the perspective of cost-efficiency is not debated more widely and with a specific focus on the context of southern African countries.

The low empirical foundation and Northern domination are recognised by participants of the discourse. Gous, Eloff, and Moen (2014) state that most research evidence and literature originates from the global North and that there is a lack of 'own' research. Therefore Northern knowledge and agendas have a strong influence on developments in the South. The import of Northern knowledge on inclusion is described as indoctrinated orthodoxy (Urwick and Elliott 2010) which reinforces 'traditional colonial notions of the superiority of the "developed" over the "underdeveloped"

worlds' (Kaplan, Lewis, and Mumba 2007, 23). Chataika et al. (2012) criticise the fact that local forms of inclusive education are not sufficiently acknowledged and that the mismatch between African realities and Northern theories actually works against inclusion.

Definitions in Use: Between Broad and Narrow Understandings of Inclusion

When it comes to the understanding of inclusion most publications by South African authors refer to the Education White Paper 6 by the South African Government (DoE 2001). In this pivotal policy document it is acknowledged that 'all learners are different in some way and have different learning needs' (DoE 2001, 16). In this policy document the Government decides for the use of the terminology 'barriers to learning and development' instead of 'learners with special educational needs or disabilities' to stress that barriers exist within the system and not within the learner (ebd., 12). This definition and terminology reflects in the South African discourse, as most participants of the discourse refer to this policy document and use the terminology. Besides the Education White Paper 6 several academic references are drawn regarding the definition of inclusion. The scholars quoted frequently by South African scholars and who can therefore be described as protagonists of the definition discourses are in one case from South Africa (Engelbrecht), and in all other cases their institutional affiliation is within Great Britain (Ainscow, Booth, Dyson, Florian, Miles, Singal), the US (Artiles, Kozlezki, Waitoller), or Australia (Slee).

The terminological use differs in the discourses in the other southern African countries. Occasionally the term 'barriers' is taken up (Urwick and Elliott 2010; Mutepfa, Mpofu, and Chataika 2007), but more commonly the terms 'children with disabilities' or 'children with special (educational) needs' are used (e.g. Okkolin,

Lehtomaki, and Bhalalusesa 2010; Haihambo and Lightfoot 2010; Kuyini and Mangope 2011). Compared to the discourses of South Africa, ability/disability as a category of difference is more often emphasised, e.g. 'Inclusion is a practice that calls for all individuals, regardless of ability or disability to participate …' (Mudyahoto and Dakwa 2012).

Whereas in publications from South Africa usually a 'broad' definition (Ainscow, Booth and Dyson 2006) of inclusion is applied where all learners in their individuality are in the focus, the definitions used in the publications of other southern African countries vary widely and range from a concern of children with disabilities or special educational needs (e.g. Okkolin, Lehtomaki, and Bhalalusesa 2010; Kuyini and Mangope 2011) to all vulnerable learners (e.g. Hapanyengwi-Chemhuru 2013) to all learners (e.g. Mudyahoto and Dakwa 2012; Kaplan, Lewis, and Mumba 2007). In two publications references regarding the definition are drawn to South Africa (Hapanyengwi-Chemhuru 2013; Pather and Nxumalo 2013). Despite these cases, scholars from southern African countries either refer to scholars with the same country affiliation or sources from the global North, but not to colleagues from other countries of the region. The most commonly mentioned scholars on the definition(s) of inclusion are Ainscow, Booth and Dyson from Great Britain.

Categories of Difference: Specific Contexts Become Visible

Categories of difference named in the South African Education White Paper 6 are age, gender, ethnicity, language, class, disability and HIV status (DoE 2001, 6). Further dimensions of difference are mentioned by Gous, Eloff, and Moen (2014), Walton (2011) and Mitchell, Lange, and Thuy (2008) such as religion, sexual orientation, learning styles, socio-economic background and being orphaned. Hapanyengwi-

Chemhuru (2013, 206) lists ‘child beggars, minority children, homeless children, displaced children, institutionalized children, orphans, children affected by HIV and AIDS, children living in poverty and immigrant children’ as children being marginalized at school. In the designation of groups at risk of exclusion a clear contextualization to the conditions of southern African countries becomes visible.

International Relation: Low Level of Southern African Discursive Interaction

In the description of the data corpus it becomes obvious that none of the publications in the corpus are authored by scholars from two or more different southern African countries. International teams of authors consist of authors with an affiliation with one southern African country and countries outside of southern Africa. Furthermore, authors usually do not refer to or cite authors from other southern African countries in their analyses. This can be considered an indicator of low cooperation between scholars from different southern African countries and separated discourses within the countries which are hardly influencing each other. All isolated discourses are oriented towards the Northern discourses even as it is simultaneously criticised within the same discourses.

Conclusion

In the understanding of the Sociology of Knowledge Approach to Discourse discourses have a productive effect and therefore, in this case, construct the notions of inclusion. The analysis shows that a South African discourse on the rationale for inclusion has developed with a shared terminology and common points of reference. The development of this particular national discourse becomes visible not only through the shared terminology and contents, but also through the number of publications with institutional affiliations within the country. In South Africa inclusion is constructed as antithesis of Apartheid and therefore carries a strong sociopolitical weight. In the

educational discourse inclusion is constructed as reaching beyond the education sector to the wider societal level. The discursive constructions of the notion of inclusion in South Africa are influenced by national policy and relate to what commentators call a broad understanding of inclusion, conceptualised as meeting the needs of all learners. The efficacy discourse, on the contrary, is less pronounced and the Northern efficacy discourse is not contextualised. However, the need to approach inclusion additionally through an empirical lens has been acknowledged and might be a future field for South African researchers.

In other southern African countries the discourses on inclusion are fragmented and less pronounced. Constructions of inclusion are mainly replications of Northern constructions. This is being criticized by actors of the discourses and a need for own constructions is postulated. The interweavement between inclusion and the development of state and society is not evident the way it is in South Africa due to its specific historical and political context.

It becomes striking that no cooperation regarding co-authorship across national borders exists within the region. A strong orientation towards the Northern discourses with a partial reproduction becomes evident through the findings, in particular when it comes to empirical results. However, simultaneously within the same discourses this Northern domination is discussed and criticised by several authors from different southern African countries.

From a post-colonial perspective (Mills 2004) it is necessary to further reflect on power exercised in and through discourses in the presented analyses. Foucault (1977) states that “We should admit rather that power produces knowledge […]; that power and knowledge directly imply one another; that there is no power relation without the correlative constitution of a field of knowledge, nor any knowledge that does not

presuppose and constitute at the same time power relations. These `power-knowledge relations' are to be analysed" (27). Looking at the interrelation and interaction of different spatial discourses with a specific focus on power-knowledge-relations can form a fruitful perspective for further research. The effects of Northern dominance in Southern discourses on local social constructions deserve to be further analysed.

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8 Discussion

After presenting the single publications in the previous chapter, this chapter initially summarises the empirical findings and later relates these findings to the theoretical discourses and the existing knowledge base presented in chapters 2 and 3. Before deriving implications for research and practice from this work, this research is reflected critically in several aspects.

8.1 Summary of Research Results

This section summarises the empirical results of the five publications presented in chapter 7. The summary is organised according to the three overall research questions.

8.1.1 How is Inclusive Education Implemented in Specific Contexts?

Implementation of Inclusive Education on Different Levels

Implementation of inclusive education happens on all levels of the education system. The Malawian system is characterised by an enormous lack of financial, material, and personnel resources (Hummel et al., 2016; Hummel, 2016). In this country, the implementation on macro level is merely a terminological one, as stakeholders on this level declare their commitment to global goals and take over the international inclusion rhetoric. District education officers at the meso level receive ambitious and abstract targets from the macro level and have only very limited possibilities to act due to the deprivation of resources. These constraints become visible in particular on the school level, where individual schools lack appropriate infrastructure, learning and teaching materials, and sufficient and qualified teachers. This results in crowded classrooms with a high level of learner diversity, failed lessons, and low quality of education in general. At the same time, teachers, head teachers, parents, and the wider communities develop creative approaches and innovative solutions to tackle these challenges. These approaches are contextual and therefore vary, and at the same time, they remain insular.

Implementation of Inclusive Education in the Context of the Formal Education System

In both countries, Guatemala and Malawi, certain tensions arising from a mismatch between the formal education system and living conditions become apparent. Addressing inclusive education highlights and amplifies these tensions (Hummel & Werning, 2016).

In Guatemala, the formal education system is largely perceived as only partially relevant for life. On the one hand, there is no satisfying relation between formal qualifications and chances on the labour market. Even highly educated people face a serious risk of unemployment. Hence, education certificates and formal education in general lose their value. On the other hand, the curricula are not relevant to the living conditions of most of the citizens, which leads to high dropout rates after some years of primary schooling.

In Malawi, requirements of formal education compete with traditional values and cultural orientations. In specific parts of the country, initiation ceremonies for boys and girls are of high importance for the society. Participation in these ceremonies leads to school absenteeism and sometimes eventual dropout. Practices in and contents of these ceremonies can also hamper school attendance of the learners in the medium run.

Influence of Donor Organisations on the Implementation of Inclusive Education

Both Guatemala and Malawi receive financial and technical assistance from bi- and multi-lateral donors in the context of development cooperation. With support comes influence (Hummel & Werning, 2016). Through supporting certain sectors, topics, or programmes, donors can push certain agendas. Or – looking at it from the other side – in order to receive support, receiving countries and their organisations have to follow external agendas. The empirical findings show that national or local organisations feel the need to compete with one another and to demarcate their work from one another as a result of external funding opportunities (Hummel & Werning, 2016). This impedes the development of coherent approaches though cooperation and exchange among the organisations. Furthermore, donor agencies have their own internal logics and procedures. Most donor interventions have a fixed medium-term timeline that does not necessarily align with the time scale necessary for deep changes, for example, in the education sector. Implementation of inclusive education in the Global South therefore is subject to extra-national influences and resulting power dynamics.

8.1.2 How is Inclusive Education Constructed by Different Stakeholders?

Constructions of Difference

The national education policy documents of both Malawi and Guatemala acknowledge several categories of difference that can lead to educational marginalisation, such as gender, socio-economic status, geographical location, and language (Hummel et al., 2016; Hummel, 2016; Hummel & Werning, 2016). Both pre- and in-service teachers in Malawi show this awareness of several forms of difference and their relevance to education (Hummel & Engelbrecht, 2018). The teachers name orphans, children living in poverty, street children, overaged children, and children with disabilities as groups that are at risk of marginalisation in education.

In these categories of difference, contextualised constructions of difference become evident. The awareness of diverse forms of difference by various stakeholders like government officials, non-governmental actors, and teachers seems to indicate a broad understanding of disadvantage. However, these categories of differences are usually not discussed in relation to the terminology and concept of social inclusion or inclusive education.

Interrelation Between Constructions of Difference, Teacher Education and Teaching Practice

From the statements of Malawian pre- and in-service teachers, it became apparent that these teachers construct learner differences in many different ways. These teachers are aware that differences in, e.g., age, language, and socio-economic background can create barriers to learning.

Those in charge of teacher education in Malawi, such as lecturers, construct ability/disability as the only relevant category of difference. The teacher education curricula impart a traditional medical-deficit view on disability. As a result, teachers have to mediate between these divergent constructions. They find it difficult to relate their understanding and the content of the training programme to their teaching practice. Although the teachers acknowledge that there is a range of diversity in their classrooms, they focus strongly on the placement of children with disabilities. Both special education and primary education teachers agree that learners with special needs are mainly the responsibility of special education teachers, as only they are perceived as qualified (Hummel & Engelbrecht, 2018).

Constructions of Inclusive Education

Inclusive education is constructed in social interactions, and these constructions become visible in policy documents, curricula, academic publications, and in the stakeholders' everyday actions. In the policy documents of both Malawi and Guatemala, no unanimous concept of inclusive education is present. The notions of inclusive education in these documents are inconsistent. Some explicit definitions of inclusive education demonstrate a broad understanding of inclusion. However, specific policy objectives and measurements then address mainly people with specific disabilities. Hence, inclusive education is mainly constructed as support for learners with special educational needs and disabilities (Hummel et al., 2016; Hummel & Werning, 2016). This understanding reflects a traditional medical notion of disability, locating a deficit within the learner. In the primary teacher education programme of Malawi, and particularly in the syllabus, the same traditional perspective is apparent (Hummel & Engelbrecht, 2018). The stakeholders' constructions of inclusive education vary more strongly than those in policy papers, as their understanding reaches from a broad to a narrow definition (Hummel, 2016; Hummel & Werning, 2016).

The case of Guatemala shows the influence of the wider societal context on social constructions. In a deeply divided country like Guatemala, inclusion is constructed as assimilating to the dominant culture and abandoning the individual or group identity. In this perspective, inclusion is not desirable for many groups and results in a demand for exclusion. The question arises if, and to what extent, a certain form of self-chosen exclusion is legitimate within an inclusive orientation. This case shows that human rights can conflict with each other (Hummel & Werning, 2016).

Interrelation Between Constructions of Inclusive Education and its Implementation

The results gained from interviews and focus group discussions with stakeholders from different levels of the education system in both Malawi and Guatemala show that the ambiguous meaning of inclusive education leads to unclear targets for all actors involved (Hummel et al., 2016; Hummel, 2016; Hummel & Werning, 2016). Without a clear orientation for actions, different ways of implementation emerged over time. The diversity in approaches led to isolated solutions – each relevant for their context, but lacking a common orientation and coordination.

8.1.3 How is Inclusive Education Constructed Through Research?

Constructing Inclusive Education Through the Rationale

In the analysed corpus (Hummel, submitted), the discourse on rights and ethics is more clearly represented as the discourse of justifying inclusive education through educational effectiveness or cost-efficiency. In most academic publications on inclusion from southern Africa, human rights, social justice, and equality form the foundation of the rationale for inclusion. A substantial difference in how the human rights discourse is framed becomes visible between South African scholars and scholars from other southern African countries. South African inclusion discourses are characterised by a terminology connected to freedom, democracy, and citizenship. Due to the specific national history of South Africa, the notion of inclusive education is closely interwoven with state development and the development of a just and democratic society. Thus, South African discourses took their own path and adopted the international rhetoric to the country's contexts. The discourses of the other southern African countries remain closely connected to the Northern discourses. Efficacy discourses are marginal, as well as local research on efficacy.

Constructing Inclusive Education Through Definitions in Use and Mentioned Target Groups

Publications from South Africa usually apply a broad definition of inclusion that addresses all learners in their individuality. The definitions used in the publications of other southern African countries vary widely and range from a narrow understanding of targeting learners with disabilities to addressing all learners.

Scholars from southern Africa list, for example, homeless children, displaced children, and children affected by HIV/AIDS as learners marginalised at schools, and age, gender, language, and ethnicity as possible reasons for exclusion (Hummel, submitted). Just as the constructions of difference by the stakeholders in the Malawian education system show a clear contextualisation to local conditions, the groups at risk named by southern African scholars exemplify specific challenges of educational inclusion in this region.

None of the publications from the region that carry *inclusion* or *inclusive* as key words focuses explicitly on ethnicity, language, gender, or HIV/AIDS. Studies on these topics exist, but the authors do not consider them part of inclusive education research.

Constructing Inclusive Education Through Determination of Research Objects and Selection of Research Subjects

As described in section 3.2, a vast majority of study participants are stakeholders on school level. Even in South Africa, where as mentioned above inclusive education discourses are embedded in the wider societal and state development, inclusive education research focuses strongly on the school level.

Four dominant research objects were identified in the field of inclusive education research in southern Africa. Various studies analyse inclusive school development and classroom practices. Research on attitudes towards inclusion, mainly attitudes of teachers, forms another frequently investigated research object. Other research objects identified more frequently are notions of inclusion and perceptions of the implementation of inclusive education by different stakeholders. These research results are both constructions on a first and on a second degree.

8.2 Discussion and Interpretation of Results

This section is structured into two parts. First, section 8.2.1 relates the research results to the international discourse and existing knowledge base that are presented in section 2.3. Subsequently, section 8.2.2 discusses and interprets the results structured according to identified dilemmas and tensions emerging from the research results.

8.2.1 Relating Results in Overall Discourse

The results of this work mirror those of previous studies and the academic discourses on the topic. Section 2.3.2 outlines a consensus by scholars of the field that education programmes need to be developed and implemented culturally and contextually appropriate. This work shows how specific societal questions, cultural values and orientations, and demands of daily living affect education and make contextualised approaches crucial. The need for local and cultural-sensitive solutions can therefore not be underestimated.

In the description of the state of (inclusive) education in southern Africa in section 2.3.3, the enormous lack of resources formed a major issue; this was presented along with remarkable examples of stakeholder commitment on the school and community level. The presented findings regarding Malawi are consistent with these descriptions.

The theoretical complexities and resulting conceptual ambiguities are explored in sections 2.3.1 and 3.1. Policy documents and perspectives of stakeholders in both Guatemala and Malawi reflect this conceptual diffusion. Several scholars argue that the notion of inclusion is mainly related to physical placement of learners with disabilities in the mainstream classroom. This narrow definition of inclusive education is also present on all levels of the analysed contexts in this work. However, it needs to be stressed that on micro level several stakeholders expressed a broad understanding aiming to create learning environments for all children and youth in their diversity, sometimes not even under the terminology of inclusion.

8.2.2 Tensions and Dilemmas of Inclusive Education

Through the empirical results several tensions become visible that result in dilemmas for actors. This section relates the research findings to the dilemmatic approach presented in section 2.4 and contributes to the empiricism-driven theoretical reconstruction (see section 5.4).

Dilemma of Shared Understanding and Contextualisation of Inclusive Education

The lack of a unanimous notion of inclusive education of both different stakeholders and within policies in the analysed contexts was presented manifold throughout this work. On the one hand, the lack of clarity is a danger, as it creates confusion; and inclusion might end up being a watered down concept. We need negotiations about the notion of inclusion on different levels, e.g., on national level of education policy making and on local level of the individual school and the surrounding community. On the other hand, no global unified definition is desirable, as the notion of inclusion needs to be developed context-specific and should not be imposed from one context to another. The ambiguous meaning of inclusive education is therefore also an opportunity for context-sensitive concretisation. For implementing inclusive education both is needed: negotiations about the meaning and objectives of inclusive education and space for local adaptations. This also requires a multilevel discourse about core elements and criteria for inclusion. Stressing the importance of localised solutions should not allow for describing any local practice as inclusive. Excluding, discriminating, and harmful local practices also need to be addressed accordingly in order to foster inclusive communities.

Dilemma of Uniqueness and Commonality

Inclusive education became a legally enforceable human right through the UN Convention on the Rights of Persons with Disabilities (UN, 2006). The case of Guatemala shows how inclusive education can collide with other human rights, such as the right to one's own culture and language (UNESCO, 2005; UN, 1992). Indigenous groups in Guatemala see their cultural and linguistic differences at stake in an inclusive education system. Cultural and linguistic diversity does not in fact collide with the concept of inclusion however it can be perceived as colliding when experiences of exclusion and oppression exist. These results show how unrealised social inclusion issues have direct impact on the notions and the implementation of inclusion, and that the implementation of inclusive education needs to be considered in the wider societal context. Furthermore, stakeholders need to balance conflicting rights and values.

Dilemma of Promises and Social Reality

In some regions in Malawi, traditional orientations are incompatible with the requirements of formal education. Cultural values compete with the value of schooling. In both Malawi and Guatemala, the promises of education to economic prosperity and social participation remain unfulfilled. Therefore, inclusive education, which is built on the promise of social inclusion and justice, becomes elusive. In this case, inclusion highlights and amplifies tensions that already exist in the general education system and in society in general.

Tension of Fragmented Interventions and the Need for Holistic Approaches

The presence of extra-national donor organisations in both countries leads to demarcation and competition among national interest groups and the influence of external agendas. Both results in hampering the development of coherent, long-term strategies. Fragmented interventions continue to exist instead of a holistic vision of the general education system. This tension does not result in a dilemma for actors, as there is one clearly favoured option for action; however, this is hard to realise given the current conditions.

8.3 Critical Reflection of the Research

This section commences with a general reflection on the qualitative research approach. It then continues on to discuss two aspects which are of central importance for this work: the theoretical complexities of this research object and resulting methodological decisions, and conducting research in a multilingual North-South context.

8.3.1 The Qualitative Paradigm

This work is based on the qualitative research paradigm in order to approach diverse social contexts in a holistic matter. The qualitative approach made it possible for this work to gain a thorough understanding of different social realities, constructions of difference and inclusion, and discourses on the topic. A qualitative research design is in particular suitable for taking the inherent complexities of inclusion into account.

Every research approach enables a certain perspective and has certain limitations. A qualitative research design is usually limited to a small number of research participants and/or analytical focuses. Thus, in this work, it was only possible to investigate selected and detailed aspects of the overall phenomenon, and drawing generalisations is neither intended nor possible.

The form of a publication-based dissertation proved adequate in embodying the principle of openness (see section 5.4) throughout this work, which resulted in using a process-oriented perspective as hermeneutic process of understanding (see section 5.1).

8.3.2 Taking Inherent Complexities Into Account

This work is based on outlining fundamental complexities of the concept of inclusive education and resulting methodological and empirical challenges in investigating this phenomenon (chapters 2 and 3). These complexities arise from differing definitions and dimensions of inclusive education, and the fact that all levels in the education system are affected. It is therefore a major orientation of this work to attempt a due consideration of the complexities of this research object. Hence, this research applies the following perspectives:

- Multilevel: A multilevel perspective was used to analyse inclusive education from global to local level.

- Multiperspective: The perspectives of different stakeholder groups in education processes were part of the analysis.
- Multicontextual: Different regional contexts formed the foci of specific analysis (Malawi, Guatemala, southern Africa).
- Multiconstructional: The research constructed knowledge on inclusive education on first, second, and third degree.
- Multidimensional: Access, acceptance, and participation were dimensions of inclusive education under study in this work.
- Multithematic: Different analyses defined differing research objects, e.g., teacher education, academic discourses.
- Multitheoretical and multimethodological: Triangulation of theory and methods was intended to increase the quality of the results.

This multifaceted approach implies both an upside and a downside. The benefit of such a research design is the possibility to capture the described complexities of the overall research object. However, at the same time, this limits research to selecting, analysing, and presenting only parts of the overall phenomenon. As in the case of inclusion, the whole phenomenon can never be studied in its entirety; we need a debate on what criteria we need to apply in order to select and contextualise aspects of the overall complex phenomenon if we hope to create meaningful results.

8.3.3 Research in a Multilingual North-South Context

My background as a German-native speaker studying in a German university inherently influences this work. The research object, which has a global dimension, made it necessary, from my point of view, to publish most articles and to write the dissertation framework in English. This is supposed to increase the possibility that stakeholders and researchers within the researched field recognise and use the research results. The list of references shows that both German- and English-speaking scholars from the Global North and South, particularly southern Africa, inform this work. Discourses, concepts, and terms in qualitative research are not necessarily the same across places and languages. Habermas (1967) first discussed different traditions in qualitative research between the USA and Germany; Flick gives a current overview of the developments of qualitative research in both countries (Flick, 2014a, pp. 17). During my research process, several moments of irritation arose that led me to the understanding that, e.g., the concepts of *Discourse Analysis* and *Diskursanalyse* are not the same and that *Critical Theories* is a broader category than *Kritische Theorie*. Therefore, while mixing sources from different contexts can

be enriching, one needs to take the different traditions behind publications into consideration. Furthermore, one needs to be aware of the different perspectives behind the sources. As research was declared in this work as a process of construction, it is relevant to consider who is talking and from what perspective. Regional affiliation is only one of several significant dimensions. The concept of positionality (Merriam et al., 2001) proves to be useful to state one's position in relation to a certain context.

Writing this work in English also made me realise that writing in a foreign language is more than a mere translation of text. Each language comes with certain expectations regarding style in academic writing. In the presented work, I tried to adopt *an English voice*, but I am sure *the German voice* is still noticeable.

Language also formed a major issue in the Refie project, where researchers with several different home languages from countries with differing official languages collaborated. In both Malawi and Guatemala, data was translated from local languages to English or Spanish. The results were eventually formulated in English. As language is of central importance in qualitative research, several steps of translation needed to go hand in hand with thorough reflections on implied concepts and interpretations, and the wider cultural implications of the use of language.

Section 4.2 discusses specific challenges of North-South research and their methodological, theoretical, and ethical consequences. It is crucial to have a reflective attitude of researchers towards power relations and one's own contributing background and resulting privileges for any form of research within a post-colonial setting. At the same time, it became evident that reflective research practice cannot dissolve power relations based on solidified historical legacies. In this research process, this resulted for me in a general tension between the aim not to reproduce power imbalances, and at the same time having certain privileges due to my background and acting within a given context of unequal power relations. I strived to be in constant exchange with researchers from the South through publishing in media located in the South, co-authoring with colleagues, and presenting and exchanging at academic conferences in the region.

8.4 Implications for Research and Practice

The results show that there is no unified version of inclusive education and no one-size-fits-all concept for implementation. Both research and practice need to acknowledge the ambiguity, fluidity, and complexity of inclusive education instead of looking for concrete guidelines on how to do inclusion. At the same time, a discourse is needed about what qualifies as inclusive education.

Tensions are inherent in any educational encounter. Inclusive education highlights existing tensions and creates dilemmas for stakeholders. The desire of stakeholders for clear orientation is understandable; however, there are no general answers to solve these dilemmas. Practitioners need to accept these dilemmatic situations and develop the confidence to balance both sides. Communication about these difficult decision-making processes within the specific settings can help to increase confidence of all actors.

In the implementation of inclusive education, it is desirable that stakeholders gain a perspective of all context-relevant dimensions of difference that lead to discrimination and exclusion, and that single approaches for specific target groups join forces, coordinate, and aim at a holistic development of education and the wider society. Research is encouraged as well to develop a broader view on the phenomenon of inclusive education and inclusion in general and to approach this topic in multiple facets. Section 8.3.2 describes how this work applied such a multifaceted approach. More debates about how to research inclusive education, how to gather and compare research results, and how to implement this multifaceted research approach are necessary.

This work supports the demand of other scholars for context-sensitive forms of implementing inclusive education. Aggregation, coordination, and upscaling of successful local initiatives can help develop stimuli for the implementation across contexts. This does not mean that what works in one context can easily be transferred to another, but disseminating knowledge about isolated approaches can help to initiate contextualised solutions in similar contexts. Therefore, research also has a role in the implementation of inclusive education. Analysing, collecting, and disseminating context-sensitive measurements and outcomes through research can contribute to the context-sensitive implementation of inclusive education.

In order to aggregate, coordinate, and upscale local initiatives, schools and communities need an appropriate scope of action. This results in possibilities for local decision-making processes and resources on the micro level for the implementation of these decisions.

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Hiermit erkläre ich eidesstattlich, dass ich, Myriam Hummel, geb. am 01.05.1983, die Arbeit selbstständig verfasst und die benutzten Hilfsmittel vollständig angegeben habe.

Die Dissertation ist nicht schon in einer früheren Arbeit als Prüfungsarbeit verwendet worden.

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