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# ‘Friendly but Demanding’? On Different Meanings of Inclusive Education as an Imagined Concept in National Reform Planning

**ABSTRACT** Since the World Conference on Special Needs Education held in Salamanca in 1994, there has been global political consensus that member states of UNESCO should implement Inclusive Education (IE). The idea that countries “should ensure an inclusive education system at all levels” is also a central objective of the UN-Convention on the Rights of Persons with Disabilities, adopted in 2006 and ratified by Poland in September 2012, and was also in evidence at the International Conference on Education held in Geneva in 2008. The article examines the connection between IE as an imagined concept disseminated by UNESCO and some examples of its various interpretations as reflected in country reports and official statements by various ministers of education worldwide. Particular reference is made to the texts of the Ministry of The National Education in Poland. The underlying theoretical assumptions of the article are drawn from insights produced by strands of sociology of knowledge and sociology of organizations based on neo-institutional theorizing. The methodology used is in-depth content analysis.

**KEYWORDS** EDUCATION FOR ALL (EFA), INCLUSIVE EDUCATION, INTERNATIONAL BUREAU OF EDUCATION (IBE), SALAMANCA CONFERENCE, SPECIAL NEEDS EDUCATION, UNESCO

## **Internationally defining “the way of the future” in education**

Policy statements throughout the world today emphasize IE as a major component of reform conceptions in education. As both an attitude and an approach to education, IE – as disseminated by the UNESCO – is widely recognized and internationally regarded as innovative. In discourses of leading international organizations, the notion of inclusion is currently mostly associated with children who have special needs as a consequence of disabilities (UNICEF 2013; *World Report...* 2011). However, since the mid-1990s, there has been a number of changes in the meaning of IE, as well as shifts in the understanding of who should be considered the target group of the concept (Kiuppis, Peters 2014; *Inclusive...* 2014).

In this article I examine both the connection between IE as an idea disseminated by UNESCO and examples of its various interpretations as reflected in 116 country reports and 144 messages from ministers of education, and particularly in reports and statements produced by the Ministry of National Education in Poland. The analysis has been motivated by the following research question: what local differences in meaning of IE can be identified beyond the similarities in framing the issues around the concept at the global level? In the context of the International Conference on Education held in Geneva in 2008 and hosted by the International Bureau of Education (IBE), UNESCO stated:

it has now been several decades since the international community provided itself with significant legal instruments which, by stressing the right of ALL children to benefit from an education without discrimination, express – implicitly or explicitly – the concept of “Inclusive Education” (UNESCO 2008b: 3).

Today UNESCO is providing a new and somewhat revised understanding of IE that considers the concept the core of the Education for All (EFA) agenda (Kiuppis 2014; Opertti et al. 2009). Whereas UNESCO had already started to formulate the idea and disseminated the concept of IE in connection with the World Conference on Special Needs Education held in Salamanca in 1994, the concept has since grown in depth and UNESCO now promotes a broader notion of IE in the context of general education as compared to the 1990s’ narrower focus on IE emerging from special education for exceptional children (meaning disabled or gifted).

At present, UNESCO is working on 24 educational themes in four categories: (1) education building blocks, (2) strengthening education systems, (3) planning and managing education, and (4) leading the international agenda. IE is one of seven themes in the strengthening education systems rubric (2) encompassing currently Roma children, street children, child workers, children with disabilities, indigenous people, and rural people. However, UNESCO goes as far as to declare IE as fundamental to achieving human, social, and economic development in general, this potentially targeting all learners, with special emphasis on the particular focus groups such as those considered most vulnerable (including linguistic minorities, nomadic children, or those affected by HIV/AIDS), marginalized (including children from households in remote communities and urban slums), or ones with special educational needs due to disabilities (cf. Kiuppis 2014: 750).

The “reinvented” idea of IE as associated with a wider target group than just disabled children was selected to be the theme of the 2008 International Conference on Education – one of the foremost international forums for education policy dialogue among stakeholders

in education.<sup>1</sup> On that occasion, IE was celebrated as “the way of the future” (UNESCO 2008a). Accordingly, almost all UNESCO member states, Poland included, as well as organizations and professionals in education are apparently supporting the concept of IE, as they all share the global aim to implement IE into their respective education systems. In other words, “there is no serious national educational agenda organized around *exclusive* principles in place anywhere” (Ramirez 2006: 440; my italics).

UNESCO’s understanding of IE that implies transnational homogenization of reform plans towards quality education for all as well as schools for all is analysed here as contrasting with the selected national policies and conceptions of educational inclusion that, according to Katarzyna Hall, Minister of National Education of the Republic of Poland, anticipate

friendly but demanding schools ... which means: equity in the access to education for all students, ensure the environment safe and favourable to the development of individual interests as well as formulate requirements clearly, fulfilling of which might bring satisfying results of education (Polish Ministry of National Education 2008a: 1).

An analysis of ministerial documents reveals broad international consent on the implementation of IE. However, I clarify how appearances are deceiving at the national level, and how there remains little consensus as to what the term IE actually means. In other words, the apparent international consent regarding IE is fallacious, as beyond the collective aim to implement IE there is no agreement upon the interpretation of IE. Conformity prevails only regarding the *vision* of ensuring that schools and communities lower barriers to learning and participation – a process that in literature on teacher education is often associated with the term “inclusive practices” (Jones et al. 2013). In addition, in academia there is no consensus as to for whom, by whom, and how those types of (often ill-defined) practices should be introduced into educational practice. Sometimes these “inclusive practices” are understood as applying to schools for all (e.g. Nes & Strømstad 2003: 117), while at other times – as applying to schools with classes for all (e.g. UNESCO 2003) or to special schools (e.g. Zelaieta 2004). However, in national reports and analysed statements from ministers of education, “inclusion” is considered to be the *goal* of education, whereas “inclusive” relates to the *mode* of education. Further, in the above-cited statement by the Polish Minister of National Education, Katarzyna Hall (Polish Ministry of National Education 2008a), the question of the target group remains open.

## **Main theoretical assumptions**

The main theoretical assumption of UNESCO’s current understanding of IE – i.e. the notion of “Lifelong Education for Everybody” (Cropley 1979: 38) – has so far neither significantly encouraged organizations in education to resemble one another (see DiMaggio & Powell 1983 on the sociology of organizations discussed in context with “structural isomorphism”), nor effectively led to homogenization tendencies in reform conceptions and policymaking at national level. This is striking, particularly because clear reference is made to the importance of transnational homogenization of reform plans towards quality education for

<sup>1</sup> “Given the International Bureau of Education (IBE) Council’s position that the frequency of the ICE should tentatively be every five to eight years, and that the holding of the ICE should depend on the need and usefulness of the conference in the light of the IBE’s programmatic priorities and on the policy dialogue context and international agenda in the field of education, it seems that such a conference might appropriately be planned for 2016 – eight years after the 48th ICE session, and the first year of the post-2015 development period” (UNESCO 2014: 6).

all and schools for all, not only in documents published by UNESCO and the IBE but also in numerous reports produced by the ministries of the member states that participated in worldwide regional preparatory conferences and workshops prior to the world conference in 2008. From the viewpoint of classical sociology of organizations, it could be argued that whereas the intentions at global and international levels are to implement IE, concrete actions at national level turn out to be “loosely coupled” (Weick 1976). Alternatively, it could be argued that there are different understandings both of IE and whom the approach addresses. Close inspection of the national reports and the “Messages from Ministers of Education” (brief announcements published prior to the 2008 International Conference on Education) might reveal a strong commitment to UNESCO’s model of IE as well as a rather wide range of interpretations of the model plus significant differences regarding both the target group(s) of IE and their respective action plans and measures.

The underlying theoretical assumption in this article is that discursive changes in the meaning of IE have been made in the course of this concept’s diffusion and translation processes. I shed light on the shifts in the meaning and on the shifting relation between IE and UNESCO’s EFA agenda that was launched a few years before the concept of IE. For the analysis of the discursive changes in meanings of the concept of IE in the context of the UNESCO programmes of EFA and Special Needs Education (SNE), the research focus is, in a micro-sociological sense, on the organizational sense-making and decision-making as responses to institutional pressures. In this context, particular reference is made to studies of the dynamics of knowledge circulation, with an emphasis on organizational practices.

The scope of this article constitutes a theoretical framework that links up with a branch of interpretive works developed in those research communities of organizational institutionalism that focus on the sociology of knowledge.<sup>2</sup> I start by incorporating the aspects both of the “interactive construction of social meaning” (Meyer 2008: 521) and the “social distribution of knowledge” (Schütz 1964: 121) found in works published prior to the “new” or social constructionist account introduced in Peter L. Berger & Thomas Luckmann’s frequently quoted book *The Social Construction of Reality* (1966), in the work of Alfred Schütz in particular (e.g. 1960 [1932]; 1964). Moreover, I draw inspiration from the newer strands of sociology of knowledge such as the aspect of the “translation” of ideas found in the contributions that derive from Actor-Network Theory presented by Bruno Latour, Michel Callon, and John Law. Thereafter, my work is informed by contributions from and around the strand of organization studies referred to as Scandinavian Institutionalism (Brunsson 1989; Czarniawska & Joerges 1996; *Translating...* 1996; Sahlin-Andersson 1996) in which the authors’ viewpoints are based on the neo-institutional theorizing originally contributed by John W. Meyer, W. Richard Scott, and James G. March and focus on “the meaning the spreading practices have in the originating as well as adopting context and the modifications – translations – they undergo in the course of their ‘travels’ “ (Meyer 2008: 521).

These contributions to theory as well as other works following the above line of thinking reflect a perspective on institutional analysis according to which organizations are, on the one hand, driven by “pressures for legitimation” and “adaptions to environmental expectations,” and by self-intentions and self-interest on the other (i.e. that depend on the organizations’ identity) (Brunsson 1998), an approach which results in the decision-making not solely determined by “the invisible hand of culture” (Christensen et al. 1997). The studies considered to be part of the field of Scandinavian Institutionalism depict organizations as embedded in an environment that provides them with expectations, identities, and rules

<sup>2</sup> Cf. Meyer 2008: 520 who pleads for a „dialogue“ between organizational institutionalism and sociology of knowledge.

for action. In this view, a phenomenon undergoes change every time it is applied in a new organizational context because its meaning derives exclusively from this phenomenon's connection to other elements in the organizational context (e.g. Boxenbaum, Pedersen 2009: 189).

All the parts of such a theoretical framework share the central assumptions derived from the works of Max Weber and Alfred Schütz (cf. Meyer 2008: 521). Thus, in common with Renate Meyer, the focus of this article is on how actors – or else, in neo-institutionalist theories, legitimated nation states, organizations and individuals – “actively acquire specific segments of the social knowledge and sediment it ... into their own knowledge” (Meyer 2008: 523). Consequently, particular reference from both parts of the theoretical framework is made to studies of the dynamics of knowledge circulation, with an emphasis on organizational practices (e.g. Sahlin-Andersson 1996: 70).

### Translation & editing

Two theoretical concepts drawn from accounts within the chosen theoretical framework are relevant to the analysis as particularly applicable tools for analyzing the shifts in the meaning of IE after the 1994 World Conference on Special Needs Education, namely, “translation” and “editing.” The first concept, “translation,” borrowed from Actor-Network Theory,<sup>3</sup> primarily from Bruno Latour,<sup>4</sup> is based on the assumption that ideas do not remain unchanged when they travel from one context to another (e.g. Boxenbaum, Pedersen 2009: 185; Sahlin, Wedlin 2008: 219). Rather, ideas are transposed and transformed when moving, a meaning the British comparative educationist Bob Cowen had in mind when stating “what moves morphs” (Cowen 2009: 315).

The concept of translation assumes that a model is “composed here and now by enrolling many actors in a given political and social scheme” (Latour 1986: 264). According to the abovementioned assumptions, the ideas around IE are considered as “(resulting) from the actions of a chain of agents each of whom ‘translates’ it in accordance with his/her own projects” (Latour 1986: 264). However, the notion of the sociology of translation has already been introduced to organizational institutionalism: Barbara Czarniawska & Guje Sevón (*Translating...* 1996) and Kerstin Sahlin-Andersson (1996) elaborated on theoretical accounts using “translation” to analyse organizational structural change. Table 1 lists some of the authors who discuss and /or develop the concept of “translation:”

Table 1

#### Selected authors who discuss and/or develop the concept of “translation”

Authors and year	Treatment of the concept	Language use
Michel Serres (1974)	Development of the concept	French: 'traduction'
Michel Callon (1975)	Application of the concept in sociology	French: 'traduction'
Bruno Latour (1986; 2005); Michel Callon (1986); John Law (ed.) (1986)	Advancement of the concept in Actor-Network Theory	English: 'translation'
Barbara Czarniawska & Bernward Joerges (1996); Barbara Czarniawska & Guje Sevón (eds.) (1996)	Transfer of the concept to neo-institutionalist organization theories	English: 'translation'

<sup>3</sup> Cf. Latour 2005 as well as the contribution in the volume edited by Law (*Power...* 1986).

<sup>4</sup> Initially, Latour took the notion of 'translation' from the French philosopher Michel Serres' work published in 1974 (Serres 1974).

The second concept, „editing,” is closely related to the concept of „translation.” Inspired by John W. Meyer, Kerstin Sahlin-Andersson (1996) introduced the concept to demonstrate that the production, circulation, transformation, and manifestation of knowledge by means of „translation” processes do not happen in a meandering, directionless way and open-endedly; rather, they follow „editing rules” and differing logics of various „editors” belonging to the chain of agents translating ideas. According to Sahlin-Andersson (1996: 82), „the circulation of certain ideas can be described as a continuous editing process in which, in each new setting, a history of earlier experiences is reformulated in the light of present circumstances and visions of the future.” Consequently, „translation” has to be assumed to be restricted, in the sense that editing serves to describe and explain in micro-analytical detail how translation proceeds (Sahlin, Wedlin 2008: 219). The concept also points to the forces that direct the translation in different phases and contexts of the circulation of ideas: „After (ideas) have been edited and imported into [another] setting, new expectations for and new meanings ascribed to the organizational activities may be a result from the language [the new setting] entails.”

### **Global talk...**

In November 2008 delegates from 153 (out of 193) UNESCO member states, alongside other authorities, including representatives from 25 non-governmental organizations (NGOs) and 20 intergovernmental organizations (INGOs) as well as other institutions and groups of experts, all met in Geneva at the 48th International Conference on Education to discuss IE along the lines of “the way of the future.” The conference has been organized in a sequential manner since 1934 by the IBE and provides a forum for dialogue between ministers of education and researchers, practitioners, and representatives of intergovernmental and non-governmental organizations. In recent decades, a large number of education policy concepts have originated from earlier International Conference on Education conferences, such as “Quality Education for All Young People: Challenges, Trends and Priorities” (47th session, 2004) and “Education for All for Learning to Live Together: Contents and Learning Strategies – Problems and Solutions” (46th session, 2001).

According to IBE’s mandate, its mission and one of UNESCO’s mission is to support the efforts of member states in providing education to all of their citizens, particularly “encompassing the marginalized and disadvantaged, whether they be poor, rural and urban slum residents, ethnic and linguistic minorities, or the disabled; all age groups, from early childhood ... to adults ... and girls and women” (UNESCO 2005: 13–15). The goal is to bring an end to discrimination through access, active participation, and success at all levels of education (UNESCO 2008b: 5), and to ensure that learners, after gaining access to education, do not remain disadvantaged and marginalized within education programmes. In this regard, UNESCO’s endeavour has been in accordance with the programmes conducted by the Organization for Economic Cooperation and Development (OECD), which in the mid-1990s had a narrower perception of inclusive education as “effective education and support structures for students with disabilities in integrated settings” (Evans 2006; OECD 1999). As a result, since the mid-1990s, IE has been commonly associated with programmes for disabled people, which is probably why most of the NGOs represented at the 48th session of the International Conference on Education dealt with disability issues.

Interpreted from the perspective of sociological institutionalism, the series of International Conferences on Education organized jointly by the IBE and UNESCO is part and parcel of multipartite communication cycles and interactions that have been reiteratively expedited by governmental and non-governmental organizations shaping accounts, rules, ideologies,

and programmes of action (Chabbott, Ramirez 2000). The formation of targets and provisions in connection with IE are fuelled by UNESCO and other international organizations (e.g. OECD, and more recently UNICEF and the World Bank) that act in their role as “teachers of norms” (Finnmore 1996). In reaction to the norms “taught” by those actors organizations in education as well as politicians and administrators at regional and community levels feel pressured to seek legitimacy by adopting reform ideas connected with IE that are either internationally regarded as successful, innovative, and modern or that are endorsed by “peers and competitors” (Scott 1994) of their “competitive group” (Krücken 2007) such as relevant other states, reference societies, and international organizations.

Since 2004, UNESCO has published *Guidelines for Inclusion*, a manual designed to “assist countries in making National Plans for Education more inclusive” (UNESCO 2005: 3) in order to ensure full access to education for *all* in the true sense of the word, and covering the whole range of different addressees and all age groups, and not just guaranteeing access to education but also tackling active participation and achievement. Additionally, this all-embracing approach to IE includes certain terms and conditions of inclusion (e.g. *how* to learn in heterogeneous learning groups) rather than the mere questions of *who* achieves and *who* has access to education (Ramirez 2006: 434). UNESCO’s *Guidelines for Inclusion* is regarded as “a first step in seeking to foster dialogue on the quality of educational provision and the allocation of resources, providing a policy tool for revising and formulating Education for All plans, and also raising awareness about a broadened concept of inclusive education” (UNESCO 2008a: 31), which – following a recommendation at the East Asia Workshop on Inclusive Education, held in Hangzhou (China) in 2007 – has been called “New Inclusive Education” (UNESCO 2007: 1).

However, the guidelines have not been put into practice. Regardless of the new term “new inclusive education,” the consent for a broadened concept of IE has not been recognized in the Reference and Working Documents published in connection with the International Conference on Education in 2008, as well as in the resulting conclusions and recommendations. Accordingly, the so-called IBE Strategy 2008–2013 implied that future accounts, rules, ideologies, and programmes of action in education would conform to the ideals of the new understanding of IE (UNESCO 2008d). Still, after evaluating the results and outcomes of that strategy, the probable conclusion is that not much more has changed besides “global talk.” Similarly to the situations which took place immediately after the conferences in 1994 and in 2008, the (refreshed) idea of IE and elements of the knowledge relating to the respective concept appeared to be “hybridizing” with what previously had been common sense (i.e. special education in segregated settings, and education for students with disabilities in integrated settings), but certainly not replacing it.

UNESCO has been imprinting national structures with the understanding that IE is “an evolving concept that can be useful to guide policies and strategies addressing the causes and consequences of discrimination, inequality, and exclusion within the holistic framework of Education for All goals” (UNESCO 2008a: 8). In the framework of EFA, IE has been invoked as a theme worldwide, and the theme dominates as a main perception in education, as can be seen in connection with the UN-Convention on the Rights of Persons with Disabilities adopted in 2006.

### **... and local action**

The empirical starting point for this article was the fact that analysis of both statements of ministers of education worldwide and country reports revealed that (1) ministers proclaim different meanings of IE and that (2) ministers’ understanding of what IE is and who the

concept relates to differs from UNESCO's provisions and targets. As a result of the spread of reference papers, guidelines, and suggestions by UNESCO, most of the documents refer to core features of IE and are similar to some extent (cf. Colin Lankshear's notion of "common features" when analysing meanings) (Lankshear 1998). However, both conceptions and perceptions of progress at national level appear to be bound to and determined by country-specific problems, socio-historical settings, and traditions (as illustrated below with reference to accounts by the Ministry of National Education in Poland).

Furthermore, when looked at more closely, the documents in question reveal quite a wide range of interpretations of IE, for different reasons. To some extent, the plethora of IE versions is due to the fact that the official UNESCO documents, which had been spread prior to the 2008 International Conference on Education, contained some incorrect translations. First and foremost, the theme of the conference, "Inclusive Education: the Way of the Future," has been translated into French as "L'éducation pour l'inclusion: la voie de l'avenir." The word "inclusion" in the French title is used in the meaning of the *goal* of educational endeavours rather than the *mode* of educational efforts, as indicated by the English word "inclusive." Furthermore, whereas in the French title education is considered a subordinate process to *inclusion* as a long-term objective, the English title refers to *inclusive* as the mode that education should be geared towards in the future. In the information and working documents of the 48th International Conference on Education, both "inclusion" as a goal of education (stated in French texts) and "inclusive" as a mode of education (stated in English texts) remain undefined as well as undistinguishable.

Another cause of the divergence in the said interpretations is, as indicated above, the confusion about the IE focus groups. UNESCO intends IE to be an all-embracing concept that targets all learners but places special emphasis on particular populations such as those considered most vulnerable, marginalized, or having special educational needs because of disabilities (cf. Kiuppis 2014: 750). However, for the most part the ministerial documents and reports tend to reflect a quite differentiated picture about which particular group of learners should especially be included in education (e.g. Ferguson 2008). Significantly, when referring to IE, only a few of the national documents consider the diverse development potentialities of all people to be the main task of IE, the latter meaning the whole range of age groups as well as the entire spectrum of learners, including all marginalized minorities but without particular reference to them. UNESCO introduces IE in accordance with its commitment to EFA, but has traditionally left people with disabilities out of that agenda (for the reasons, see Kiuppis 2014).

UNESCO traditionally considered IE as a continued process towards the goal to provide high-quality education with equal respect to the diversities within democratic school cultures. In comparison, at the national level the term IE is often used instead to give priority to some learners. Furthermore, the idea of "lifelong" education is often neglected in discussions on IE at national level. It is therefore striking how extremely seldom IE is mentioned in national documents with relation to lifelong and adult learning and to respective learning environments for others apart from children and youths, and outside schools (e.g. universities). Adults are mentioned in less than one-fifth (27 of 144 cases) of all ministers' messages on IE. The scarce literature that does exist on IE in higher education predominantly deals with particular minorities rather than with learners as a heterogeneous group (e.g. Pumfrey 2008; Riddick 2003; Skelton 1999). Some exceptions are Santhanam & Hicks (2004), King (2001), and Nunan, George & McCausland (2000). However, it should be noted that one possible reason for the underexposure of IE in higher education could be the fact that the latter is per se a level of education where admission is restricted. Since

other entrance qualifications rather than age are usually decisive for whether a person can enrol at institutions for higher education, the key idea of lifelong education for everyone appears to be even more inconvertible in practice.

Even national reports from countries renowned as reference societies because of their putatively exemplary implementation of IE (primarily Canada (Hinz 2006) and Finland (cf. Halinen & Järvinen 2008) show that in particular subnational regional contexts or in certain conditions some groups are partially prioritized and their needs are taken care of through special programmes and services:

The vision of Inclusive Education can be said to be conceptualized in two complementary ways in the provinces and territories in Canada. The first is within the framework of human rights legislation and the *Canadian Charter of Rights and Freedoms* which provide a solid legal framework to the principle that all individuals should have equal opportunities. Within provincial and territorial legislation and practice, inclusive education is also understood as the special programs, services, funding and policies that are put in place to support those students who may be the most vulnerable or who would benefit from additional attention and approaches (Canadian Council of Ministers of Education 2008: 35).

A number of national documents reflect the paradoxical interpretation that IE is addressed *equally to all* but *especially to some*. Whereas, according to UNESCO (2005: 11), “inclusion ... involves adopting a broad vision of Education for All by addressing the spectrum of needs of all learners, including those who are vulnerable to marginalisation and exclusion,” in national documents the special needs of some learners are often overemphasized, and thus in a sense they are being singled out. Therein lies the underlying dilemma of IE policy and practice: “How does one include without excluding or further marginalising in the process?” To some extent, remembering John Rawls’ “egalitarian difference principle” – a perspective that takes into consideration both the differences between learners as well as their equal rights – might be helpful for policymakers and practitioners in education (Rawls 2003 [1921]). Accordingly, specific measures that are necessary to accelerate or achieve de facto equality of learners do not necessarily need to be considered discriminative, marginalizing, or excluding (cf. UN 2006, Article 5). Rather, exclusive concentration on different development potentialities, abilities, characteristics, and expectations should – together with UNESCO’s definition of inclusion – be understood as a prerequisite of IE in any heterogeneous group of learners. However, in the case of the national report from Finland (along with Canada, often considered a reference country), IE emerges usually in conjunction with special needs education and is therefore almost entirely referred to as the education of children with disabilities:

The strategy for the development of special needs and inclusive education proposes that the current practice be changed to focus on support and prevention that is remarkably earlier than today. This intensified support should be adopted as the primary form of support before a decision on special education is made. This would, according to the strategy, be the way to reduce the number of pupils needing special needs education decision (Finnish National Board of Education 2008: 21).

In some countries, national policies even bring their plea for segregating schools and programs in line with IE, stating that they may not foster “inclusive” education at the level of school cultures and environments but are justified insofar as no one is deprived of their right to education. This might suggest that special schools contribute to making an education system more inclusive. Yet, this argument, often made with reference to international

commitments such as EFA or Article 26 of the UN Declaration of Human Rights, is clearly the opposite of what UNESCO means by “the way of the future.” According to UNESCO, social inclusion is necessarily but not exclusively linked to more inclusive practices in education.

In other words, social inclusion is linked to the development of schools or learning environments that cater for the needs of all individuals in a community and respond to the diversity of learning needs, regardless of the individual’s social origin, culture, or individual characteristics (UNESCO 2008c: 5). This means that schools that assume the moral responsibility to include every learner address the “open learning potential of each student” and change along with the learner instead of expecting the latter to adapt to the norms, styles, routines, and practices of the school (Skidmore 2004). Those schools aim towards enabling teachers and learners both to feel comfortable with diversity and to see it as a challenge and enrichment of the learning environment rather than a problem (UNESCO 2005). As identified by the International Commission on Education for the 21st Century, set up by UNESCO, not only embracing and celebrating diversity but also “learning to live together” is prospectively considered “the greatest challenge facing education” (UNESCO 2000: 5).

In Poland, the statement by Minister Katarzyna Hall (Polish Ministry of National Education 2008a) did not reveal any focus on a particular group of learners. Inclusive education is imagined in context of the national school reform plans introduced in the autumn of 2009 (Wolny 2010) aimed at establishing schools that are “friendly, but demanding.” The only categorization of learners refers to “students threatened of [sic!] educational exclusion” (Polish Ministry of National Education 2008a: 1) and to “the youngest children” for whom easier access to education should be ensured. These two points have consequently directed attention to the preschool education of children aged 5, especially those living in rural areas.

In addition, the ministerial curricular reform planning uncategorically pointed out the “[p]ositive attitude to the diversity of students and their needs” as well as “individual differences as opportunities for enriching school offers” (Polish Ministry of National Education 2008a: 1). The system of public education is considered the “the main place which ensures the development of human individuality and social inclusion of every student, which is the first step towards an inclusive society” (Polish Ministry of National Education 2008a: 2). However, regarding the demands of the Polish Minister of Education for schools to be “friendly but demanding,” it appears likely that the latter is only a slogan, ergo, hardly a basis for an education reform leading to social inclusion. Another question is whether social inclusion does not require measures beyond the reform of education, for example to ensure the access to work, resources, rights, goods and services for all as postulated by the National Action Plan for Social Inclusion for Poland.

Parts of the National Report of Poland for 2008 explicitly refer to certain groups, such as children with disabilities (Polish Ministry of National Education 2008b). However, in the section “Current vision of Inclusive Education” preschool education is dealt with as an effective instrument for equal opportunities, which refers to all persons and particularly to children from rural areas.

### **Inclusive societies – is IE a precondition or a long-term objective?**

Thus far, I have shown how UNESCO disseminates IE as a “central issue [of] how to transform education systems and other learning environments in order to respond to the diversity of learners” (UNESCO 2005: 13–15). The examples of different understandings of IE reveal that within the UNESCO member states there is a tendency in policymaking for

a wide range of concepts and terms of inclusion rather than a convergence. Nevertheless, consensus can almost be found in the fact that it is the rule rather than the exception that public policies on IE at national level first and foremost address children and youths.

In UNESCO publications, IE frequently appears in conjunction with the concept “inclusive society,” a society that not only respects the individual differences of all citizens but also values them, and one “where all people learn together and participate equally” (Koichiro Matsuura, Director-General of UNESCO, qtd. in UNESCO 2008b: 4). Three aspects of the concept of “inclusive society” attract attention. First, when reading national documents that refer to the concept of “inclusive society” (or *‘sociedad incluyente’* or *‘sociedad de incluidos’*), it is sometimes not clear whether the institutionalization of IE is understood on the national level as a precondition for an inclusive society, or as an ultimate goal that cannot be reached unless an inclusive society is set up in advance. However, the IBE and UNESCO subscribe to the view of IE as a “precondition,” clearly paving the way from inclusive education to inclusive society, calling IE “the way of the future.” This is also apparent when OECD representatives stated: “Fair and inclusive education is one of the most powerful levers available to make society more equitable” (Field et al. 2007: 11).

Second, in contrast to the concept of the global “knowledge society” (Jakobi 2007), countries do not consider themselves to be members of *one* inclusive (world) society or as becoming part of it, but rather refer to it foremost as a national goal. Their aim is to strengthen their education systems and to lay the foundations for a national inclusive society. This tendency occurs in line with UNESCO’s guidelines, according to which “education systems reflect the image of societies and are an important vehicle for their transformation... Education can be an important tool for inclusion ... an education system can equally be a mechanism for exclusion” (UNESCO 2008b: 8).

Third, UNESCO member states hardly follow the target to declare the inclusive society as the long-term objective of IE. Significantly, only 22 of 113 national reports on IE refer to “inclusive society” as a component of reform conceptions in education, although UNESCO considers the concept a central part of its strategy. According to UNESCO, the idea of inclusive societies is theoretically intertwined with IE:

Inclusion is not in the first place a matter of education or teaching, but concerns the respect of human rights that affect primarily the directions of general policies in a country. It is therefore inseparable from the way in which the society itself is conceived or well-being is desired and the way in which ‘living together’ is viewed. Social justice, social inclusion and inclusive education would seem to be inextricably linked. The tendency towards an inclusive society would seem to be the basic foundation of sustainable social development. It is probably not an exaggeration to say that inclusion represents a good measure of the democratic health of a country. In fact the value of a democracy is measured by the way it treats its minorities and marginalized populations — whatever their characteristics and status — and its attempts to provide them with greater autonomy so that they may participate fully in social life (UNESCO 2008b: 6).

Because the vision of an inclusive society and IE as “the way of the future” are intrinsically related to each other, the central role UNESCO assigns to education is to foster social cohesion, reduce inequalities, and raise the level of knowledge, skills and competences of all people in society. Since policies throughout the world aim to maximize the lifelong potential of individuals in terms of their personal development and their contribution to a sustainable and democratic knowledge-based society, educational actors (especially in higher education) are increasingly obliged to implement IE.

At the beginning of this article, I argued that to date the main underlying key idea of the IBE-UNESCO model of IE, which is broadly in line with the old utopian phrase “lifelong education for everybody” (Cropley 1979: 38), has neither significantly encouraged organizations in education to resemble one another, nor effectively led to homogenization tendencies in reform conceptions and policymaking at national, regional, and community levels. In addition, I have elaborated the point that in the national context “for everybody” often means “especially for some.”

## Conclusion

In this article I have referred to the fact that, *prima facie*, there is a global consensus that IE should be established within the UNESCO framework. UNESCO is a global player with a more or less powerful influence on educational development. Moreover, based on national reports and statements from ministers of education, I have revealed that beyond the globally shared vision to implement IE national strategies and action plans reflect a variety of understandings and interpretations of IE and are therefore linked both to differently arranged modes and to different goals of inclusion in education. Regardless of the impact UNESCO’s idea of IE has on the level of “policy talks” (e.g. awareness-raising), I have argued that developments on the “action” level (e.g. legislation, finance, and curriculum design) turn out to be just “loosely coupled” with the model, its objectives, and the rationale behind it. In other words, using assumptions of sociology of knowledge and of organizations, IE as an idea that was once shaped and disseminated by UNESCO has turned out to be packaged and formulated in different ways (cf. Czarniawska, Joerges 1996; Sahlin, Wedlin 2008).

I have highlighted the tendency for national reform plans towards inclusive education systems to be linked to the conditions of country-specific preferences and requirements rather than to UNESCO’s guidelines. Firstly, the analysis of the messages of ministers and of national reports from UNESCO member states shows that the aspect of lifelong learning is often neglected, although extensively described in information documents by UNESCO (e.g. UNESCO 2008c). Instead, the focus lies on children and youths. During the endeavour to adopt and implement IE as a major component of reform conceptions in education, only in a few national contexts was IE understood as a strategy to initiate an “Education for All” that is available throughout a person’s lifespan and regularly set up in diverse groups of co-educated learners. In addition, higher education plays just a nominal role in national reports and messages of ministers. Secondly, the analysis reveals significant divergence in how the ministerial documents pave the way in which IE is meant to be translated into educational reality. Sometimes IE is understood as implying schools with classes for all, while at other times it is understood as implying schools for all with special classes, and occasionally – as some schools for all and others with special classes.

In national reports, emphasis is often put on what are understood as integrative schools in special needs education, meaning programmes that provide special teaching arrangements designed for a few pupils (particularly children with disabilities) to be educated within a group of learners that are homogeneously classified as not having “special needs.” However, inclusion in education is still frequently considered on a level with integration, as can be seen, for example, in the Polish version of the UN Convention on the Rights of Persons with Disabilities, in which, in Article 24, “inclusive education system” has been translated as the “*system edukacji integracyjnej*,” and attempts at differentiating the former from the latter sometimes remain neglected as a “terminological game” rather than appreciated as fruitful reminders of the conceptual progress that IE as a model has undergone since the mid-1980s (Booth 1996; Hinz 2004).

In light of the theoretical framework that I have drawn upon in this study, the establishment of UNESCO's special education unit in the 1960s should be interpreted as an adjustment of organizational action and structures according to the institutional pressures that UNESCO was exposed to at that time. Sociological neo-institutionalism considers organizations as embedded in enabling environments as well as in constraining environments, which mediate expectations from peers and competitors, and from other actors in respective fields. According to the theory, actors generally strive to gain legitimacy (not primarily efficiency), and organizational conformity to pressures from the environment simultaneously increases positive evaluation, resource flows, and hence survival changes.

To summarize, even school systems with supposedly equal educational resources or what is called "educational equality" still often have different forms of schooling rather than ordinary schools for all pupils (Baker et al. 2005: 71). While UNESCO demands an increase in inclusive schools (i.e. schools for all) "for a diverse group of learners to be educated together" (UNESCO 2005: 25; 2008a: 23), the messages from ministers of education and national reports suggest, for the most part, a quite different form of allegedly "inclusive" schooling. Further, in relation to initiatives and efforts favouring specific groups that claim their right to education, in national contexts IE is often still simplified as an attitude and a new approach to education for children with special needs (mainly disabilities), rather than to education in general.

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#### **“STANOWCZO ALE DELIKATNIE?”**

#### **O ZNACZENIU EDUKACJI INKLUZYWNEJ W PLANOWANIU REFORMY NARODOWEJ**

**STRESZCZENIE** Od roku 1994, kiedy to w Salamance odbył się Światowy Kongres nt. Edukacji Potrzeb Specjalnych, istnieje globalny konsensus polityczny dotyczący implementacji przez państwa członkowskie UNESCO Edukacji Inkluzywnej (IE). Koncepcja „gwarancji, iż [kraje] winny wdrożyć zasady Edukacji Inkluzywnej (IE) na wszystkich poziomach” jest również centralnym punktem Konwencji UN o Prawach Osób Niepełnosprawnych przyjętej w roku 2006, a ratyfikowanej w Polsce we wrześniu roku 2012 – była ona również dyskutowana na Międzynarodowej Konferencji nt. Edukacji w Genewie w 2008 roku.

W niniejszym artykule zbadano powiązania istniejące pomiędzy IE jako globalną koncepcją rozpowszechnianą przez UNESCO a jej lokalnymi interpretacjami w postaci raportów i oficjalnych oświadczeń ministrów edukacji, w szczególności Ministra Edukacji Narodowej. Bazą teoretyczną artykułu są teorie socjologii wiedzy i socjologii organizacji odnoszące się do szerszej teorii neo-instytucjonalnej, a metodologię stanowi głęboka analiza tekstu.

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