

PROSPECTS

quarterly review of
comparative education

ISSUE NUMBER NINETY-FOUR

VIEWPOINTS/CONTROVERSIES

OPEN FILE

Special needs education

TRENDS/CASES



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EDITORIAL

Education for all also means education for everyone. If a nation cherishes all its citizens equally, it must ensure that all of them have effective access to its social goods, including education.

Yet we know today that national education systems fail millions of children. They do this either by making inappropriate educational provision for them or by excluding them from schooling entirely.

The year 1990 provided the first signs that the challenge of exclusion from education was being taken up by the world's leaders. This was at the World Conference on Education for All: Meeting Basic Learning Needs (Jomtien, Thailand) when the goal of 'education for all by the year 2000' was adopted.

It was in 1994 that one of the most significant international opportunities occurred to build on the Jomtien initiative and to examine with care the practical requirements that have to be satisfied to make inclusive education a reality. This was the purpose of the Salamanca World Conference on Special Needs Education: Access and Quality, organized by the government of Spain in co-operation with UNESCO. The goal was nothing less than the inclusion of all the world's children in schools and the reform of the school system to make this possible. The conference provided a platform to affirm the principle and discuss the practice of ensuring that children with special educational needs be included in these initiatives enabling them to take their rightful place in a learning society.

In the past, special education was defined in terms of handicapped children with a range of physical, sensory, intellectual or emotional difficulties, who had to be educated in certain ways and in certain settings. There was a clear distinction in the education system between those who were handicapped and those who were not.

The ideology and concept of handicap came under severe scrutiny in the early 1960s, partly triggered by concerns over discrimination and the denial of rights, as well as the labelling of people, but more significantly by the understanding and acceptance of the ecological dimension to disability and learning difficulties and the interactive concept—that the child's learning difficulties were the result of the

interaction of a multitude of factors: those within the child together with a variety of environmental factors, such as poverty or lack of stimulation, and a number of factors primarily related to the school, such as poor educational provision, inappropriate teaching and misguided assessment standards. Thus, it became plain that the concept of special education needs has to be widened to include all children who, for various reasons, are failing to benefit from school. In addition to children with impairments and disabilities who are prevented from attending their local school, there are millions more who experience difficulties—whether temporarily or permanently—or who are only able to complete one or two years of primary education, are forced to repeat grades and often drop out. And, of course, there are those who for various reasons are simply not attending school.

A concrete outcome of this debate is that special education is now an issue for mainstream agendas, referred to today as the ‘one school for all’ approach or inclusive education. Inclusion can be initially understood as a move towards extending the scope of the regular school so that it can respond to the greater diversity amongst children. Inclusive education is not the same education for all. It cannot be assumed that, because special educational needs must be met on a large scale, personalized attention is less necessary. Inclusive education should be part of an overall strategy for achieving education for all. It is not a new departure, but a revised means for supporting the efforts of governments to reach universal primary education (UPE) in an affordable and cost-effective way.

In this issue, *Prospects* publishes a selected number of papers on special education needs presented at the Salamanca meeting. Educational policy trends, linked with the work market, teacher training, school management and organization, the promotion of innovations, teaching methods, community participation, among others, are the main themes analysed by specialists, decision-makers and practitioners. A particular acknowledgement should be made to Lena Saleh, responsible for UNESCO’s activities in the field of special educational needs, who contributed to the conception of this dossier, and to Karen Dust, for her editorial work.

This issue of *Prospects* is complemented by a provocative analysis of insecurity in the world today and its consequences for education by Luis Ratinoff, and an enlightening reflection about new challenges in the field of education and work by Hermann Schmidt. These two contributions, we are sure, will stimulate debate on the future of education.

JUAN CARLOS TEDESCO

VIEWPOINTS/CONTROVERSIES

GLOBAL INSECURITY AND EDUCATION:

THE CULTURE OF GLOBALIZATION

*Luis Ratinoff*¹

Security is the centrepiece of twentieth century politics. The theme is so pervasive that still today—in spite of some unsettling circumstances—most public decisions are framed as contributions to reduce uncertainty. It seems to me that the modern concept of security was built on the fears and hopes generated by the tragic events that dominated European history during the first half of the century. The painful experiences of wars, revolutions, political oppression and widespread deprivation generated deep impressions and strong feelings. Leaders and followers reacted to the possibilities of total destruction by proposing a security agenda based on a profound reinterpretation of liberal political traditions. This idealistic programme expressed the belief that history can be redirected in a positive way to prevent fatal and undesirable outcomes.

Security was framed as 'liberation' by the winning pro-democracy leaders in 1943. They promised that in the world to come, the mistakes of history will not be repeated because human beings will be free from fear, violence and need. On this public commitment, the welfare state was consolidated as one of the essential tools to enlarge democracy, and the Bretton Woods agreements and the United Nations system were meant to provide a general framework for stability and international co-operation.

Luis Ratinoff (Chile)

Former professor at the University of Chile, at the School of Advanced International Studies of Johns Hopkins University, and at the Latin American Program of Georgetown University. Since 1993, he has been chief of the Strategic Studies Office at the Inter-American Development Bank, Washington. Social policy issues and educational policy are Mr. Ratinoff's main areas of intellectual concern. His most recent journal articles include 'Basic education and primary education reform priorities' (1992), 'Educational rhetorics in Latin America: a century of experience' (1994) and 'Economic adjustments and poverty: lessons from the Latin American experience' (1995).

The rebuilding of Europe and Japan at the beginning of the post-war period put the spotlight on the importance of economic growth and of open community systems to achieve social justice, peace and stability. The vague concept of development began to dominate public speeches and to synthesize the hopes for a new era ruled by progress and order. The founding blocks of stability—to be achieved in a common effort—were public health, education, food and job security, old age retirement programmes, unemployment insurance, and income support, housing and shelter for low-income people. These goals required a significant rate of economic growth, of capital formation and of efficient productive structures. It required also substantial transfers of resources from the industrial centres toward the less-developed periphery.

This generous programme failed due to various factors and forces, but that is not the subject of this paper. It is more important to emphasize that the struggle for security has ended. We seem to be entering an age dominated by widespread insecurity, not of large, formidable enemies to deter as in the recent past, but rather of ubiquitous threats all over. Explosive societies prone to revolution are becoming implusive, less compact and conservative. The uncertainty characterizes the incentives of today's globalization scenario; the values and the conventions of the culture of security are rapidly being replaced by blurred cultural parameters and spontaneous reactions to the challenge of increased insecurity.

The cultural dimensions of modern society

The goal of making the world less dangerous had a profound influence on modern social values and cultural institutions, because such ideas resonated with emotion for people who were asked to sacrifice their lives in two wars, to face revolutionary challenges, to respond to the negative and skilful manipulation of irrational feelings and, at the same time, the use of rationality and technology to enslave and even exterminate large human groups. The delusions of the culture of security are difficult to grasp because they are rooted in these deep emotions. The linkage of moral progress with material improvement, of culture and humanism with efficiency and of political identity with justice and fair representation, expresses the need to introduce positive values into the harsh realities of economic and social life.

Societies seeking security have wagered on the overwhelming priority of prosperity, of human capital formation and of impersonal political rule. Let us use these three dimensions to highlight some cultural underpinnings behind the complex notion of modern security.

IN PROGRESS WE TRUST

Faith in the positive moral effects of material progress is indeed the central tenet of the culture of security. The idea that well-being is a civilizing factor assumes that a high density of interlocking interests encourages the need for shared rationality

among those involved in the networks, and fosters feelings of solidarity and human concern; on the other hand, deprivation nourishes insularity, parochialism, selfishness, and the brutal realities of segregation and factionalism. If the extension of the material bases of life are a source of rationality and moral sentiments, there are good reasons to be optimistic about the final outcomes of transitions or conflict situations when increasing economic prosperity is an active factor.

No wonder that 'instrumental rationality' became the main cultural tool to achieve material progress, and at the same time the strategic criteria to organize ideas, values, and goals. Other facets of human understanding and expression were relegated to the sidelines of cultural development. To be consistent, the process of legitimizing intellectual endeavours and products has increasingly responded to the notion that abstractions are worth their contributions to well-being. A new strategy for cultural development has emerged: the products of human imagination are meant to improve the material sustenance of individuals and groups; in turn, the growing prosperity is supposed to enlarge cognitive horizons by providing expanded capabilities to explore new frontiers.

Twentieth-century individuals learned not to hope for but to expect miracles from the workings of instrumental rationality. Expectations became reinforced by results. Time and sufficient resources were thought to be the main obstacles to conquer the key constraints of human existence. Since 1950, cultural priorities have reflected a succession of concerns related to specific historical challenges and also to a much better understanding of some natural processes. To reduce uncertainty has been the common theme in weaponry development, in disease eradication, in space exploration, in the search for new materials, in energy control and in information technology.

If in the culture of security the common thread of progress is material well-being, it makes sense to assess the value of equity, freedom, compassion and fraternity as comparative consumption priorities. The realistic implications of material security are worth mentioning: everything has a price, there are no longer absolute values, only options and real or imagined pecuniary sacrifices for each alternative. This moral arithmetic fits well with the idea that happiness is a function of consumption standards and provides the basis for a society of calculated consensus in which nothing has total precedence. In this scenario, strategies based on weighed choices are a must and only the multiplication of means opens new degrees of freedom. The rational allocation of resources to increase them is the main factor of human liberation.

INSTRUMENTAL RATIONALITY AND PERSONAL RESPONSIBILITY

Formal education is the second leg of the security culture. The assumption being that sustainable material progress requires a community of individuals endowed with modern skills, motivated to struggle and improve their lot, and aware of the sacrifices, opportunities and choices. Perhaps the concept of 'agent' is helpful in this context. It is expected that those who acquire the abilities provided by formal

education become agents capable of forging their futures, while uneducated individuals are bound to remain as spectators of their own fate.

Behaviour qualities attributed to the influence of schooling are a blend that includes instruments to project control over the environment, internalization of socially accepted objectives and familiarity with the technique of instrumental rationality as the main problem-solving device. Since the final products are individuals, the effectiveness of the mix is more relevant than the significance of the components. Cultural tooling supplied through schooling is meant to have a lasting effect and be reinforced throughout the life cycle. The idea of individual agency is the organizing core of modern school teachings. The personal responsibility model responds to the notion of being able to generate those goods and services required by a self-reliant individual; in the same vein he is supposed to have self-discipline and the motivations to cooperate and to compete with others. In addition, the instruction provided must instil the capacity to communicate, and the abilities to calculate, analyze and synthesize.

Modern education emphasizes a passion for order through the internalization of affective neutrality values, but only after a socialization cycle in which well-integrated families are supposed to provide the bases for emotional maturity. Without this complementarity, formal education cannot control the quality of mass-produced 'reliable' individuals. The high effectiveness attributed to school technology, as a factory to extend cultural empowerment to the whole population, depends also on the incentives of the surrounding social environment. Not only are families to care for the proper grounding of the affective side, but community values must be compatible with the classroom working hypothesis regarding the outside factors of success and failure.

The culture of security's insistence on the virtues of formal education as a preparation for life assumes that material progress has crystallized into strong families and communities through the creation of a favourable environment. Personal responsibility is a socialization ideal for emotionally developed individuals, a stage to prepare them to participate in new and reinforcing processes of social learning implicit in the adult world.

THE CREATION OF AN ENABLING IDENTITY

Identity is the third leg of the modern security culture. The psychological need for protection is high in a world ruled by impersonal competition and material rewards. The fact that most people settle in specific places, conduct their daily communication in a given language and are immersed in the same culture, provides a fertile ground to develop feelings of allegiance beyond their primary networks.

To include diversity, modern identities have a contractual nature. They are binding because belonging implies a collective compromise of protection and order. The concept of citizenship is in fact a complex normative abstraction and a smart device to foster trust and co-operation. Citizens form 'constituencies' insofar

as they participate in a social space defined by rules, obligations, impersonal loyalties, and the tacit acceptance of a common fate.

This covenant is dynamic, it relates individuals to communities by emphasizing the ideal of a potentially better order. In the culture of security, unity of will and fairness of purpose are put together. The nation is conceived as a social compact to improve living conditions; it should provide the enabling medium for the orderly achievement of life goals. Institutions are open structures that can be perfected through consensus formation. In this context, justice becomes the continuous output of an adaptive social process that requires widespread participation. This is the main source of social legitimacy; initial rights and obligations are only *formal conditions* to be fulfilled by historical chains of substantive decisions.

The abstract community of citizens is indeed a formula of strength, erecting a canopy of institutional protection for individual goals and for collective action. It transforms powerless isolated human beings into agents capable of influencing their own destinies. This enabling function of citizenship reduces the dangers of political hazard and closes the circle of security by providing a protected turf.

Adapting to global insecurity: the quality-of-life dimension

While the structure of the culture of security was being erected, hidden forces and interests were already actively undermining the foundations. The symptoms began undetected and after two decades came to the surface as abrupt expressions of long-repressed realities. The threshold to the new millennium is in fact paved with significant signs of global disorder. Gradually, we are becoming painfully aware of how the proliferation of unresolved problems is redefining the world we live in, how the most dynamic contemporary trends overstep existing institutions and conventional values, and how the political and economic wisdom of security seems to have no responses for the new challenges.

The idea that this is a crisis stems from our present inability to perceive new organizing principles behind the apparent disintegration of institutions and value systems. It seems that whatever is to come is not here yet, and what is still with us may not last after it arrives. We are in the middle of a complex and perhaps major historical watershed. Since most of the symptoms are related to ongoing globalization processes and policies, it is proper to describe it as a globalization crisis.

These symptoms have not materialized everywhere in the same way. Differences in intensity, time and composition are significant and express the diversity of situations and cultures. The new trends are persistent, they are slowed down but not deterred by local conditions. Whatever the final outcome, it looks like most of the world will be affected in one way or another.

The process began earlier in the United States of America. Perhaps this can be explained by the country's role in international affairs, the dollar's dominance in trade and financial markets, the deeper impact of technology in most aspects of daily life in a society unbounded by traditions, the challenges of integrating wide

internal diversities and the relatively weak solidarity values. It is likely that these conditions released forces interested in the opportunities of a globally reaching economy, and unleashed trends that gradually began to test the resiliency of existing institutions and values.

Industrial Europe followed an alternative path. A historical experience of wars and political catastrophes raised the priority of security above everything else, and globalization began regionally, moving forward under the umbrella of a political project to prevent new social and military confrontations in the area. Supranational institutional and compensatory mechanisms were established. Formalized procedures for orderly advance to regional integration with the government, sometimes with the peoples' formal consent, were the chosen means to reduce the risks of a pilotless transformation. This framework for carefully crafted reforms was meant to preserve the countries' social fabric and the welfare of populations. In the European experience, the unsettling effects of globalization have been greatly reduced.

In Japan and other recently industrialized Asian countries, the strategy was to strengthen social and economic internal integration through the promotion of export economies to harvest the advantages of trade liberalization, but at the same time erect implicit and sometime explicit cultural and economic barriers to filter the impact of external inputs. The challenge of outside diversity while keeping the strength of internal unity proved to be a winning combination to penetrate markets, mobilize capital and absorb technology. As in the European experience, the preservation of equity values and of a cultural identity has contributed to economic and political success. The idea of domesticating the wild horses of globalization, to build a modern and dynamic national economy required a high dose of protection and consensus formation.

Liberalizing trade in countries with weak economies, significant inequalities and loosely integrated constituencies seems to be a high-risk strategy, especially when applied as shock therapy. If, in order to participate in the global economy, radical doses work better than gradualism, it means that the higher the insecurity created by reforms, the more effective the expected results. The hypothesis is that there are not internal grounds any longer for trust, consensus formation and prosperity. Overcoming the 'low quality' of this situation requires external political and economic support.

This approach relies on having a firm and sustained international support from both the advanced economies and the global financial community, and to use this trust for building from scratch a modern economy, a stable political order, and if possible a progressively open social structure. The strategy enhances external vulnerability and makes the strengthening of community cohesion dependent on keeping the trust from abroad.

From a country's perspective, to go global means a trade-off between preserving the local quality of life and carving a sustainable niche in some of the global networks. In the global reach and total risk approaches, social and ethical concerns are sacrificed in order to achieve economic modernization and growth. Insecurity

is a challenging and welcome ingredient to leaving the past behind. The other strategies are politically oriented and place a premium on reducing unsettling consequences in order to preserve the essential macro-social balances, to move forward under the leadership of elected authorities.

OLD STABILITY AND NEW INSTABILITY

While we seem to be experiencing a phase of relative prosperity and economic expansion, the millennium is ending with looming symptoms of economic instability. This is not due to uncontrolled inflation, abrupt price increases in strategic commodities, revolutionary threats or the mismanagement of temporary recessions. The leading indicators suggest that the cycle of low inflation will continue, and nothing abnormal is expected in the prices of major inputs; organized social unrest is not a realistic threat and the industrial centres seem to be able to soften their cyclical ups and downs with relative ease. The conventional blocks of stability are all in the proper place.

The new instability seems to have different sources. Trade deficits have become a chronic occurrence in some areas of the world; currency adjustment is a challenging issue; unemployment, job insecurity and low wages are threatening the welfare fabric of societies. In spite of modernization and prosperity, there are ominous signs of persistent or even increasingly regressive income distributions; finally, related to these trends, there is the expansion of short-term global financial transactions on a world scale beyond anything known before. In addition, fiscal policies to bring down public deficits have reduced the state capacities to counter-balance the narrowing of opportunities and wealth concentration. We don't know whether these disturbing symptoms are here to stay or whether they are just the signs of a transition toward a more integrated and balanced global economy, but whatever the final outcomes, present trends will project a significant shadow in the times to come.

This is a brand new scenario. Insofar as heterogeneous local economies become intermingled in a very unequal partnership, countries, sectors and interests are bound to pay different adjustment costs and receive uneven rewards. If these trends continue, it is likely that at the beginning of the new millennium, a highly interconnected world economy driven by global corporations and more integrated risk markets will challenge human capabilities to provide direction to the process. In this possible scenario, the options provided are narrow, mainly adjusting to changing conditions in order to extract the maximum economic value from the prevailing circumstances as a bonus toward achieving a margin of security.

Let us mention three aspects that define globalization today:

1. The government efforts to regulate trade liberalization on global bases are just beginning and do not include labour conditions and environmental care, on the assumption that any ground for hidden protectionism should be avoided.
2. The nature and importance of the international risk industry makes the control more elusive. Regulations over financial transactions are bound to be local,

therefore not very effective, because risk differentials are, in fact, sources of speculative income for the highly mobile financial capital.

3. The gradual fading of national barriers to investments has opened a wider space for the global firm in search of better returns and markets, taking advantage of local conditions.

The present stage suggests that globalization will proceed on automatic pilot for quite some time, entrusted to the learning and anticipatory capacities of global economic actors. Whether the end result will be a set of naturally self-regulating mechanisms and a better distribution of economic activities, or a series of small and big booms and busts and a landscape of increasing regional disparities, is something to be seen in the years to come. In the meantime, we are painfully learning that the overall fluidity creates big risks in the private sector that sometimes require massive rescue operations using public funds. These interventions have limits and while the compensations avoid bigger catastrophes, they also generate large undeserved rents, and sometimes they invite higher risks in the new expansionist phase.

LOCAL OR GLOBAL VALUES

These trends are influencing economic values and expectations. There are signs of gradual but nevertheless significant change.² On the positive side, survivalism seems to be spreading fast and economic adaptability is on the rise. People and firms are learning to live in more hazardous, threatening and chaotic situations, realizing that it is unrealistic to project future stability around the corner. The structurally bounded economic realism of the past is being replaced by the logic of unbounded competition. However, since the new competitiveness requires that one extract value from changing opportunities, the advantages of reducing time perspectives and maximizing present returns have a greater weight in the decisions to commit resources. On the negative side, job insecurity and declining real incomes have reinforced these trends. Up to now, the reactions have been baffling: the inhabitants of the global world want to become intensive consumers, have a low propensity to save and tend to accumulate large debts. These changes suggest that the solid middle-class economic values may be on the way out. The moral ideal of personal solvency, hard work and autonomy does not fare well in a climate of globalized insecurity; furthermore, thrifty behaviour is not akin with the pressures of modern comfort.

Contemporary individuals are quickly learning how to take advantage of changing circumstances and to expect direct and immediate reward. The global ethic of unbounded competition and affluence has outmoded older middle-class views regarding the acquisition and use of wealth. These new preferences may be functional in the present scenario. The two leading factors in global integration are: (1) new ways to enhance capital formation processes; and (2) the rapid growth of high consumption. The gradual increase in potential consumers does not seem to be enough. Interventions to lure new marginal consumers quite often threaten

the stability of the overall establishment and have negative effects on capital accumulation. Experience shows that high consumption propensity provides some of the additional boost needed without jeopardizing capital formation. If this is politically sustainable, a morality based on thrift and solvency, hard work and individual choice is ill-suited for answering the dilemmas posed by an environment of prosperity with economic insecurity. Instead, the ethic of unbounded competition and affluence is more functional for the situation. Furthermore, unregulated competition justifies income differentials, including the self-serving use of accumulated wealth; only the affluent intensive consumer is able to liberate himself from material constraints without threatening the structure of society.

THE NARRATIVES OF LABOUR AND MANPOWER

Competitiveness is a catchword in the globalization jargon. The concept is usually used very broadly. In strong industrial economies it may justify currency devaluation but also overvalued exchange rates to foster confidence in backward countries. In the last decade, the idea of competitiveness has been increasingly identified with a uniform set of policy prescriptions to create favourable conditions for private sector development rather than the achievement of specific efficiency goals. These policies emphasize capital formation and relegate labour to a secondary role. Interest rates are meant to be in line with inflationary pressure, wages are to be kept as low as needed to reduce costs, and inefficient firms are to exit or to become leaner and, if possible, to incorporate new labour-saving technologies. More significantly, whenever there are productivity gaps among countries, low wages are expected to provide the marginal competitive edge required to remain in business. From this angle, labour is an important residual factor but not a priority. In a modern setting one must be transformed into 'human capital' or 'manpower' to be a positive factor in productivity and in technology absorption.

In a global world, the redundancy of labour is an important issue because wage rates can no longer be locally determined. Up to now, the problem has been conceptualized in terms of the relationship between the scarcity of 'human capital' and the abundance of unskilled workers. In fact, there are two parallel and complementary lines of thinking: one highlights the positive contribution of scarce manpower to productivity; the other concerns the transformation of labour into human capital while taking into consideration the constraints and possibilities of different economic environments.

The manpower philosophy is concerned with the lean firm that employs small numbers of qualified workers and pays higher remuneration, to compete in the high-productivity end of the market. This theme has organizational implications: less bureaucracy and a flatter structure, where most of the repetitive and physical work is replaced by intelligent machines and the executive officers are open to feedback from the lower ranks. The operation becomes a co-operative endeavour: a total quality work environment to stimulate productivity.

The second philosophy is concerned with the problem of labour redundancy in a world increasingly dominated by high-tech solutions. Two sets of proposals are provided to deal with this issue. In less-developed societies with wide sectors of the active population unemployed or underemployed but with scarce manpower, a minimum of basic education and specific skills are considered to be a must to participate in the global economy; while in modern industrial societies, the advice to provide some instruction and skills may still apply to adult groups of the underclass, but the thrust is to significantly improve school levels: the minimalist normative concept of basic education must be significantly expanded to include much higher grades.

Implicit in both narratives is the idea of a global labour adjustment. Global policy mongers assume that high productivity will tend to concentrate in the industrial centres while less efficient activities will be gradually transferred to more backward areas. This means a long transition with benefits for everyone.

The success of this global reallocation of economic activities depends on the amounts of new jobs created at both ends of the development spectrum, on the prospects that the structural barriers to absorption of more educated workers in backward settings will be overcome and also that better remuneration will not be significantly affected by increases in the supply of educated personnel.

THE LABOUR REDUNDANCY ISSUE

I don't have a crystal ball to deal with these complex issues. I have mentioned them only to highlight the importance of labour redundancies in a globalizing world. The symptoms have already appeared and the issue is a matter of public concern today. Countries with policies to sustain salaries tend to experience long periods of unemployment, while high employment rates seem to be associated with persistent low wages. Furthermore, industrial countries are quickly dismantling liberal immigration policies to block the inflow of workers from less developed areas; in addition, radical public attitudes toward foreigners are finding wider and more influential audiences. The nationalization of job opportunities is the contemporary response to the global challenge of workers' mobility in a world of labour redundancies and significant wage differentials. Once these barriers are in place and the ghost of labour immigration is under control, time has been won indeed, but the creation of alternative opportunities of quality productivity with lower salaries somewhere else cannot be excluded as a threat for advanced economies.

Labour redundancy is one of the globalization issues not easily dismissed. The futuristic fantasies of the coming information age—based on projections of present trends and problems—illustrate some of the complex consequences of integrating parochial realities using a single efficiency scale in a period dominated by powerful labour-saving technologies. The main paradox of the fantasized information age lies in the contrast between the expected openness, rationality and overall prosperity, on the one hand, and the highly segregated employment structure it requires, on the other hand.

While capital has a paramount importance expressed in technology and specialized knowledge, the labour surplus represents an unresolved, residual social and political problem. The direct solution to this enigma is a society ruled by a benign elite of polyvalent specialists, which the complexities of a totally interconnected social and physical reality seem to require—benign in the sense of preserving the order by providing reasonable basic prosperity for the majority and cultivating the appearance of general participation.

It is easy to show the contemporary roots of these futuristic images. A large number of jobs were added during the last twenty years, but behind these optimistic figures a well-defined, two-tier labour market emerged; in addition, unemployment has remained high and persistent in a significant number of countries, and social policies seem to be less than effective in dealing with an underclass that remains impervious to prosperity.

Most of the economic and social consequences of labour redundancy are well known; they relate to poverty and deprivation. In addition, there are other behavioural implications. First of all, labour redundancy affects the work ethic: if a good job represents a privilege, it does not make sense to believe in the rewards of honest work any longer, as job opportunities and promotions become improbable inside informal sponsored channels. In this scenario, the feelings of personal power so central in the motivations of the work ethic are likely to be replaced by a more fatalistic and opportunistic outlook. The gap between professed values and the 'street-wise' ethic of labour redundancies may contribute to a great deal of cynicism regarding the allocation of social rewards.

GLOBAL STRATIFICATION

The idea of an international social stratification system has had several proponents in the past. By relating the country's ranking in material progress to internal inequalities, many analysts have suggested a co-determination linkage. The present narratives of global stratification start from the assumption that the new classes are already emerging as a direct extension of the global power structure. In this interpretation local factors are incidental because power is directly conferred by the operations of the global economy.

This notion of a global class structure is a projection of present trends and it blends well with the futuristic images elaborated by the technocratically-oriented imagination. The organizing assumption is the inevitable decline of parochial national societies to be replaced by a global system integrated by interest networks free from political constituencies. Because of the fading importance of local structures, it is inevitable to assume that national societies under globalization pressures will split into a hierarchy of specialized networks.³

It is likely that in the years to come, global businesses will continue enjoying the highest rates of returns, paying top remuneration, employing the best personnel and operating more or less free from parochial restrictions. Because they invest locally, they also employ well-qualified administrators and buy productive local

services. In addition, a set of geographically-oriented activities are indispensable to supply the goods and services that constitute the quality local base required to attract investments. Finally, there is a residual low-productivity network based on the supply of unskilled or semi-skilled labour.

Each one of these four economic networks faces different constraints and opportunities. Global business is footloose and strictly organized for profit making; local operators and suppliers have mixed loyalties but basically respond to their global employers and buyers; only the local goods and services producers face the complex dilemma of having to protect their interests, paying attention to political stability and equity issues. The low-productivity economic network survival depends on low wages and sometimes regressive labour conditions but provides a strategic employment cushion.

The relative importance of each network varies. In the most advanced countries, the global sectors represent a significant proportion of the economy and the employment. In the backward countries the economic weight of these sectors may be high but the employment effect is more circumscribed. To create low-paid jobs in the advanced scenario may represent a social problem and some political turmoil, but in the backward scenario it may be construed as a positive contribution to stability.

Linkages between the high-productivity global network and the locally-oriented production are more intense in the advanced countries, fostering a natural community of interests. In the backward countries, the linkages are rarer and the promise of overall prosperity induced by the global sector is the blending factor, in exchange for providing favourable local conditions.

A gigantic power game underlies the role of each player in this new order. Global networks today command many times more influence than in the past. Their incidence in public decisions and policy matters is overwhelming and highly visible in risky economies. They constitute a very small group in control of extensive economic resources, but in spite of the significant degree of concentration, they are diversified and competitive. Both this fluidity and the very complexity of national societies preclude sustainable collusion. However, there is a significant convergence regarding basic conditions to take risks and a tacit solidarity, perhaps as a result of the awareness of the gruesome economic power they hold. Uncertainty and the competitive pressures to multiply capital and gain higher yields, shorter periods and the spread of risk through financial markets are essential tools for global power development. High finance plays a rallying role by defining the strategies for risk taking. Financial institutions have the short-term capacities to reward and punish and are able to pressure governments to accept general policies to reduce basic hazards. There are also some long-term risk takers that—because of their control of a specialized technological ‘know-how’ and the large amounts they invest—rely on specific agreements wherever uncertainty is too high. The global players’ ascendancy in defining general economic rules to reduce risks and also their direct capacity to extract exceptional conditions highlight the power they command.

Longer-term commitments require well-paid local administrators and a fair amount of buying from local suppliers. These groups have a dual influence. As representatives and associates of a global network, they participate in local elites and contribute to opinion formation on strategic public issues. This indirect but privileged access to decision-making makes them indispensable for the interests they represent. Also, they bridge the gap with the real environment required for production processes and provide essential information and advice for global players. Without this intermediary body, the hardships of mutual adjustments could be troublesome.

At the very core of what is left from the national societies, there is a network of quality producers of goods and services for local consumption. This is a larger and more complex interaction system. It is highly diversified, heterogeneous, requires sophisticated conflict resolution mechanisms, social mobilization, and compensatory interventions. To provide stability and order, both internal and external anxieties must be lowered to a level compatible with the material and human investments the reproduction of the community requires. Nevertheless, globalization policies have reduced the capacities of local elites to deal with the challenge of blending fairness with efficiency. These policies have also restricted local public commitments and undermined the very idea of a constituency of responsible citizens sharing the burden of a common fate. The nation-state becomes an array of subordinate networks of interests, gradually deprived of value content and collective goals. This hollowing of complex communities fosters survivalist individual groups and regional reactions as a protection against uncertainty. The relative autonomy of the survivalist networks represents a modern version of the eighteenth and nineteenth century European civil society, but without the complementary state leadership and protection.

A low-productivity world lies at the bottom of the scale as a stubborn reminder of the persistence of unresolved inequities. This is a universe in itself, it includes labourers, peasants, minorities and native groups. They remain either totally marginal or they are integrated through sub-standard wages and incomes. Most of the time, their quality of life requires subsidies. Insofar as the idea of a national constituency has become politically obsolete, the low-productivity network is increasingly a problem area. The networks of deprivation tend to crystallize in alternative cultures with dynamic illegal sectors that add to the general insecurity of local societies.

This hierarchy of networks based on self-preservation has risen as a consequence of the disembodiment of national systems. It is filling the vacuum left by the political project of trying to use the market to replace society as much as possible.

THE REPRESENTATION OF INTERESTS

There are other emerging trends. In many places the perception of shrinking opportunities has changed expectations and commitments toward the community.

More self-centred objectives are slowly replacing the ideal of participating in a wider covenant. The extent of social responsibilities is no longer the result of political negotiations, but an issue affecting the incentive rationale of an 'efficientist' social model incompatible with too much public involvement. The notion of a restricted social pact among detached career-seeking individuals is the explicit metaphor used in decision making. Such a predicament assumes that the simple protection of persons and of property rights is more than enough for community life.

As a consequence, the international integration of parochial economies is not politically neutral. A constituency willing to eliminate economic barriers and protections must go along also with the unexpected loss of control of processes that in time may affect their own welfare. Up to now, most decisions in the emerging global systems have been diffuse. Sometimes, unpredictable reactions to events show a disregard for the social and political consequences. To say that the pursuit of higher returns is the guiding concern in global markets is just a tautology, but the adoption of an economic liberalization strategy means that national authorities must relinquish many important policy capacities to deal with value issues, parochial objectives and the welfare of vulnerable groups. The higher the exposure, the fewer the policy instruments left to cope with unforeseen events and consequences. Economic constituencies with their adaptable networks for representing interests are beginning to openly prevail over political constituencies with their elected officials and bureaucratic institutions.

The power shift is significant and compensated. The overall importance attributed to economic prosperity provides a wide range of justifications to emphasize the written and unwritten rights of private economic interests today, and, by exclusion, the basic assumptions which define a shrinking state role. Many of these views have a negative slant toward public life. First of all, there is the idea that the fiscal crisis is structural due to the interplay of external pressures and bureaucratic interests: it is a game of mutual support among two sets of 'free riders' in which public goals are sacrificed. Secondly, there is the theory of a state overloaded by a multiplicity of complex demands that public institutions can't possibly satisfy. Thirdly is the idea of reduced legitimacy of self-seeking entrenched bureaucracies alienated from the population they are supposed to serve. These anti-statist arguments reflect a political mood adverse to public solutions, a functional adaptation to the gradual de-tooling of political institutions required by ongoing globalization policies.

THE DETACHED CITIZEN IDEAL

This change in the political culture emphasizes the privatization of public responsibilities. Privatization is a word with several meanings; perhaps the most important one today is to reduce public involvement in community affairs to the bare minimum. By disenfranchising the state, the culture of commitment is being slowly replaced by the politics of fostering uncommitted or partially committed con-

stituencies. The idealism of conditioned allegiances based on the observance of universal principles and values embodied in the idea of the nation is fading. Instead, a new realism is growing. The emerging political values place short-term self-interest at the core of a more individualist ethic. The Bismark conception of a citizen ready to help the nation and to strengthen the political commonwealth seems to have disappeared. The new citizen as an individual realist follows an alternative agenda. He is in the driver's seat, demanding benefits from the nation or asking to be left alone without restrictions to pursue his own objectives. The dominant public rhetoric emphasizes the notion of the 'detached tax payer,' a reluctant complier who believes in the strict application of the maxim '*do ut des*'; because whatever does not come back in exchange for payments is bound to create 'profit seeking' opportunities. The reduced public covenant to empower the 'private' is a strong metaphor to justify withdrawing from any political obligation beyond short-term self-interest.

The detached citizen is a new ethical paradigm, more in line with the morality of competition and affluence and better adapted to deal with uncertainty. He thinks that the present value of collective and future benefits is so low as to be neglected. His compliance is a function of low government costs and reduced public sector bargaining capacity. A political society of detached citizens is prone to privatize public altruism and to shatter the unifying force of collective action.

The privatization of altruism is not just an efficient neutral device to achieve more with less resources. It also means community disengagement from universalistic goals. Private obligations are always voluntary, regardless of the amount of passion and dedication of private agents; the generous objectives are pre-political in intent, and whenever a political purpose arises, it is not based on consensus to achieve universalistic community goals.

THE END OF POLITICS

Many influential people believe today that the power monopoly of the nation-state is on the way out. They do not base their case on the external challenge. However, they recognize that in a world ruled mainly by the impersonal forces of unchecked competition, governments have lost their grip on protecting their constituencies, and because they have become toothless, they are a liability. Whether the state is in fact irrelevant in dealing with global issues is not central to the new political mood. The strong revival of anti-statist ideologies plays a significant role today; the ideologies make the argument and articulate the prevailing mood, but to bloom they require fertile social and political ground. This ground seems to be provided by the erosion of the social bases of the state: the spread of popular feelings of alienation from public institutions and the image of rhetorical, impotent and corrupted power elites (described by the prevailing ideologies as ineffectual and parasitic).

If the state is no longer considered to be a good problem-solver and harmonizer in areas of public concern, political and social solipsism takes over. Post-modern people have become ill-prepared to give for public causes. The idealistic

few who believe in personal sacrifices for altruistic objectives do not identify any longer with the questioned universalistic goals of entrenched bureaucracies, and suggestions to experiment with better alternatives to deliver public goods and services find very favourable audiences.

Looking deeper into these trends, the power transfer from public officials to a plurality of private interests is perhaps the most important aspect of the latest transformation of the modern state at the end of the millennium. It is still too early to see the consequences. In the coming years it will be seen if national political institutions are in danger of becoming empty shells and citizens of being hostages of random decisions beyond their control. There are too many new intervening factors to predict anything yet. However, political processes are rapidly changing, challenged by the expectations and conditions of the emerging global scenario.

The conventional wisdom takes for granted that by depriving the state of the excessive powers acquired before, a better balance will be achieved. But today, public sector reforms are not just 'trimming'. The central idea is to depoliticize the state, to abandon the concept of public bargaining power in favour of the concept of a corporation with fixed goals and parameters requiring technical management. This proposal is implicit and explicit in all the blueprints and in the much-publicized popular meaning of the term 'governance'. Reducing wide political issues to narrow sector management concerns has not only valid practical implications but also hidden effects on public values and objectives. A brief consideration of such an agenda suggests that a new political stage is in place. Let us examine some of the symptoms.

A review of today's fluid politics indicates that most people seem to react to the consequences of professional politicians—associated to special interests but alienated from values and broad objectives—by adopting simple moralistic views and efficiency criteria to judge public life. Electoral incentives reflect this angry and sceptical mood. We do not know enough of the etiology of this situation except that the political arenas gradually have become hollow, leaderless and empty of collective goods and objectives to deal with the constituencies' concerns in an effective manner. Feelings of impotence, of being unrepresented and of facing urgent problems which nobody seriously cares about have quickly spread among disaffected and sometimes indignant citizens.

The rise of professional politics devoid of broad goals and values seems to be associated with the declining influence of labour. Political idealism fed off the confrontations between workers and employers in the past, the administration of this conflict demanded some social fairness and balance. The triumph of capital in globalizing economies has redefined the scenario. Without ideological options, the decline of party politics has been unavoidable. The financing of elections has strengthened the umbilical ties between special interests and elected officials, and constituencies have limited influence in the definition of the public agendas. In fact, this strategic political function is under suspicion. Many people believe that the public agenda has become a smokescreen to hide special interests. Others feel that the priorities are randomly determined by the interplay of powerful networks

and fortuitous events, and that long-term issues are crowded out by an array of short-term concerns of small groups commanding too much influence. Voting for somebody who will act to represent special interests is a disincentive for active participation. For alienated constituencies, technical management and honesty are the last ditches left.

THE INFORMATION REVOLUTION

The challenge of abundant information is a significant factor today. On the positive side, the myths and riddles of power are more exposed to public scrutiny. To fool all people is very difficult under the present circumstances. The concept of 'transparency' has made inroads into the public jargon.

Information dissemination through mass media plays a significant role in the process of globalizing culture. For most people, the positive consequences of extending information seem to be self-evident. The spread of knowledge is supposed to foster a better understanding of facets and complexities, reducing deep-rooted preconceptions that imprison minds and segregate interactions, and bringing to the surface public moral transparency. The liberal assumption that information is always neutral and objective regardless of pre-existing social interests and goals should be carefully evaluated in today's world.⁴

Whenever a high-information-density scenario has emerged, some hidden issues have become evident: the cost of producing and disseminating good information can be high, the competition for audiences among sources and flows of different quality can be confusing, and the existing capacities to absorb information may produce mixed results. While in low-density information environments the challenge is mainly quantitative, in high-density environments the effects of quality, competition and saturation cannot be ignored. The information revolution has completely redefined the terms of the problem.

Cultural changes due to increased information are all over and becoming more apparent every day. Sharing abundant information is a new community experience that requires adequate social and political conditions and facilitating technologies. In restrictive environments, knowledge seems to play a progressive liberating role, but in open situations information flows become integral components in the normal life of people and institutions. Information abundance has two basic effects. On the one hand, there is a great deal of de-mythification regarding conventional views, traditions and power; on the other hand, the majority of people become heavily dependent on the provision of signals. This double movement away from self-styled beliefs towards more adaptive agendas highlights how in the global culture individuals find themselves immersed in impersonal but active networks of dynamic signals, which provide an array of multiple competing meanings and changing intelligibility.

The information revolution has internal and external limitations. The media constrains the messages, the individuals the reception. In most societies dominated by high-density information, the majority takes for granted the validity of the

media epistemological bias while reacting to the contents and the surrounding circumstances. They become blindly immersed in the information network's priorities, truths and meanings.

In modern information societies, the average educated individual absorbs complex ideas through simple messages, perceives hypotheses and research results as subjective experts' opinions, objectivity as equal time and space, and tends to disregard the assumptions and the cumbersome processes of generating new knowledge. This cultural frame of reference has political, social and ethical consequences.

First of all, the unity of perception is broken into a changing kaleidoscope of fragmented expediency strategies. These are simpler and direct, a substitute for more comprehensive views and encompassing goals. This is not just the philosophical 'findings' of a strayed elite, but a widespread existential belief affecting daily choices, therefore reinforced through behaviour and social learning. Secondly, everybody's life has become affected by the modelling effect of information. People and groups tend to develop anxieties toward real or imagined communication slants. Ideas, policies and power are conditioned by the production of mass information images, because the contents cannot be isolated from the intended or unintended emotional charge they convey. Whatever the specific logic of information markets, stereotypes, oversimplification, or objectivity achieved through equal time and space, and emotionally-laden effects, all of them constitute epistemological conditions bound to create random slants and defensive posturing. No wonder that modern elites tend to administrate the sources and whenever possible to manipulate the messages through closures and leaks. To counterbalance these effects, audiences expect an aggressive media to reveal a world made of 'cover ups', in order to throw light into the motives and actions behind the appearances. The economy of information networks requires that this random revelation is followed through while a chorus of point of views is provided to achieve objectivity. This is the implicit image of reality which the modern culture of information transparency presents to mass audiences.

THE CONSEQUENCES OF INFORMATION SATURATION

From the reception angle, narrow absorption capacity is the strategic bottleneck in a new world of abundant information. The importance of this issue for globalization does not require further comments. During the last twenty years, information has been growing faster than the individual and institutional capacities required to make sense of the new diversity of signals and messages. The modern globalization culture cannot be isolated from this experience, it in fact reflects the fears, hopes and strategies of saturated audiences. The phenomenon is so pervasive that even specialists seem to be affected by information flows beyond their reach or grasp. The great expansion of social and individual capacities to absorb new knowledge—achieved through a century-long extension of formal education—has become exhausted and superseded by a phase dominated by structural reception

constraints. Saturation contributes to a vague mirage in the competition for attention among unweighted alternative views, a sort of 'Tower of Babel' syndrome.

The popular idea that information is in itself an enlightening force must be qualified, taking into consideration the interaction between the quantity and quality of knowledge and the structural limitations at the receiving end.

Whenever there are untapped capacities to absorb knowledge, the provision of new information seems to enlarge comprehension and awareness, including tolerance margins for dissonance. Empirical data suggests that the threshold for ambiguity is wide in unsaturated environments. Most people trust the positive consequences of the 'new knowledge effect' and expect that temporary contradictions and social irrationalities are doomed with the coming of better understanding and transparency. Ignorance is viewed as a threat, optimism prevails with respect to the accumulation and dissemination of knowledge and the value formation effect of enlightenment is taken for granted.

Saturation represents the opposing side of the spectrum. This scenario is simple to describe: capacities are overburdened by sets of confusing signals and people imagine that this randomness reflects the work of out-of-control factors. This condition changes the relative value of information. In fact, the abundance of messages becomes a threatening flow and cultural closure a reasonable strategy to achieve order and security; it seems rational to reduce overall anxiety by emphasizing narrow *a priori* criteria to pre-select the valid signals. By 'creaming' the information, individuals and institutions expect to re-establish the equilibrium between people and unstructured random messages. This closure explains the increasing adoption of limited and specialized agendas to deal with the challenge of complexity, and also explains the disregard for whatever does not fit into the pre-selected perspectives.

But modern cultural closure is not irrational self-delusion or naked censorship. While the closure mood is grounded in anxious confusion and insecurity, it intends to be a realistic response to the challenges of information overflow. The strategy categorically rejects improving the capacities to deal with complexity and instead narrows them in order to provide simple action paradigms. This seems to be the social purpose of contemporary cultural parsimony: action models based on simple and sometimes unrealistic assumptions but nevertheless with totalizing implications. These syntheses produce dominant viewpoints and also protection against 'information redundancy'.

The function of cultural closure is to stabilize meanings and objectives to counterbalance the fluidity of saturated environments. Dismissing information becomes a source of power wherever people are stunned by the proliferation of confusing signals. Adequate or not, simple formulas provide simple answers for complex challenges beyond the reach of educated individuals. If saturation makes the burden of complexity unintelligible and unbearable, it is no wonder there is a social craving for simplifications, a popular demand for translating simplicity into action and a preference to reduce action to means. It is a paradox that the new

wealth of information is not used to enlighten the process of goal definition while simplicity deprives objectives of any meaningful content.

THE EFFECTS OF THE NEW COMMERCIAL CULTURE

Globalization is associated with the rise of a world mass market for cultural products. This market should not be confused with the one created by the mechanical reproduction of elite cultural creations at accessible prices. The new market depends on catering to the preferences of large impersonal mass audiences and providing them with cultural commodities easy to consume.

These expressions are a major source of alternative images of life and reality today. Their success can be explained because they generate significant revenues and provide instant gratification. The stark contrast between these ubiquitous and easy to acquire expressions, and the taxing procedures which the learning of more conventional cultural tools demands, highlight the rapid expansion and influence of commercial culture. The format becomes natural with the extension of the electronic media. Traditional learning requires costly specialized institutions and teaching strategies. Furthermore, the economic product of education takes a longer term to mature and the benefits are difficult to capture as commodities.

Commercial culture has become the organized and highly professional folklore of the modern electronic age; it is profitable, can be easily mass produced and communicated. It is highly adaptive, trendy and can even induce taste changes that add to profits. Entertainment provided to address global audiences, through sonic and visual images, is the main objective. Like other artistic expressions, the commercial culture transmits subliminal messages combining sets of sensory perceptions. Because this is a commercial endeavour, the intent of reaching the broadest possible audience across classes or countries tends to emphasize the sensory component. The fading of the argument intensifies the media subliminal communication of action-oriented meanings.⁵

The ethical consequences of commercial culture—as we know it—are the subject of a lively debate today. There are two criticisms: one refers to the amorality or immorality of the explicit story, the other to the crudeness of the texts, images and sequences. However, the central issue is in the kind of hypnotic influence that modern mass culture seems to have on global audiences. The moral hazard comes mainly from the dissolution of the organizing argument, when it becomes atomized in the meanings conveyed by the intense language of the illusions. In those cases, whatever remains of the story is an accessory for the indirect but more effective messages. The new ethical experience provided does not come from the contrast between the imagined story and the real world, but from the ‘liberating’ experiment of the direct sensory language. The images’ intention is to suggest possibilities that transcend present social and human limitations. They constitute an unbounded arena for direct action and instant gratification, in contrast with the bounded and dull reality of daily life, mediated by rules and rational calculus.

This implosive radicalism legitimizes the role of primary drives by depicting the conventional order as a network of appearances hiding double standards. The action 'realism' is achieved by association; time and space locators are just symbolic evocative signals to furnish 'ambience' without compromising outcome to previous evolution or to environmental constraints. Sequences allude to possible result-driven sources chosen from a limited set of alternatives. If action causes cannot be distinguished from action results, will is the determinant. Direct action re-establishes the basic transparency regardless of the mediation of rules and rationality.

The lessons of modern commercial fables thrill the audiences by providing direct and simple action responses to complex problems, by suggesting moods to deal with situations, by emphasizing specialized reactions for each challenge instead of abstract guidance. In a world imagined as dominated by uncertainty, with hollow institutions and fading effective rules, the subliminal ethic of commercial culture makes a lot of sense.

The consequences for education

THE EDUCABILITY CHALLENGE

Educability is becoming a significant issue in globalizing societies. The social and cultural facilitators of formal and informal learning cannot be taken for granted any longer. The business of inculcating values and giving meaning to knowledge has never been easy but the new environmental disincentives add an extra dimension of difficulty to the task. This new dimension has disqualifying effects.

The rise of competing mimetic processes makes family role models and formal education less effective. Parents are forced to devote more time, attention and energy to achieve results, and perhaps to lower their initial expectations. The new factors seem to militate against any influence based on authority and pre-ordained commitments; in fact their intent is to free the individuals from traditional constraints. Generation gaps crystallize into peer group cultures to institutionalize the reception of alternative life styles and loyalties. In the global markets, this trend has been reinforced by the supply of a wide array of commercial cultural commodities.

Formal systems of education are also deeply affected. Modern schools assume a population willing to acquire an education. In fact, motivational failures make formal teaching less effective. Most of the public discussion today seems to be concerned with the limited results of trying to educate children in poverty areas. This is indeed the extreme case but not the only one. Schools don't fit well with the 'survivalist' values of groups struck by deprivation; education is always a longer-term projection. To overcome their limited horizons, poor people must blindly bet on the future, but they lack the incentives, the information and the resources.

The poverty case helps to understand some important aspects of the general challenge posed by lower educability. The adoption of special programmes of

remedial education to fill motivational gaps is the favourite prescription and seems to work better when applied to pre-starters. The second major innovation is to improve teaching technologies and supporting institutional arrangements. Finally, sticking to the essentials and reducing expectations is the pragmatic way of dealing with the effects of adverse environments.

The comparison between educability issues in poverty areas and in areas where excellence prevails overshadows the average case and the overall trends. In fact, the idea that excessive pressure on students is counterproductive has led into a more relaxed teaching approach followed by the unloading of non-essential subjects. The arguments seem persuasive. These adjustments represent a realistic response for students less motivated to learn through lengthy formal procedures. The idea of lightening the cargo without sacrificing the essentials is attractive for all parties involved. Like any other formula to achieve more with less, it has shortcomings as well as advantages: we are slowly finding out that relaxation strategies do not work as planned, and there are voices that argue that they at most represent an orderly retreat.

Perhaps the general case can be presented as follows: whenever educability is a constraint, teaching systems must be adjusted. On the one hand more resources are needed to cover the gaps created by these external diseconomies; but on the other hand, the diminishing returns of the new remedial programmes tend to lower expectations. Teaching becomes more expensive and less effective.

There are other consequences worth mentioning. Low educability is a frustrating factor, because teaching technologies are impotent to deal with the causes, and the best remedial actions to compensate the symptoms have mixed results. Nevertheless, motivation failures condition the school technologies' success rates. Educational efforts must overcome widespread feelings of futility and shortages of adequate funding. In fact, more resources are made available where schools seem to succeed.

In adverse environments, schools and families are under pressure; in addition to the external difficulties, internal determination is continuously tested by circumstances. There is an overall weakening effect. Feelings of impotence concerning the relative futility of the effort must be overcome on a daily basis. Furthermore, authorities are less prone to improve the financing of failing institutions but instead assume wastage and let attrition do the job.

The content of education is also affected. Educability problems tend to hollow the value content of formal learning processes. Less motivated people are more concerned with instrumentality than with the learning of meanings. By catering to them, the association between the acquisition of tools and the system of knowledge becomes restricted and blurred. Furthermore, the value side of relating goals to means remains marginal; when the central purpose is to programme individuals to handle specific sets of abilities, character formation, individual vocations and creativity are secondary priorities. The pressures to hollow the contents of educational products are widespread today and affect not only the service provided for those who cannot pay for their schooling.

The market price for a well-rounded education is on the rise. Most cost analyses are concerned with productivity in public institutions, a sector dominated by attrition. No wonder that the climb seems to be much faster in private institutions where market factors have more weight and the effectiveness of learning is significantly better. Private schools enjoy huge external economies, they recruit in social groups that consider education a status component. In addition, they have endowments and receive grants. In spite of all these discounts, the real price of tuition has steadily gone up. There are two new factors worth considering that may have altered the challenges and the cost composition of quality education. First of all, the effect of massification: a heterogeneous clientele results later in a more complex learning environment. Secondly, families are no longer the strongest socializing influence.

Sustained cost increases in quality education are the result of structural pressures affecting strategic items. It is likely that teaching efficacy has not improved significantly enough to be counted as a gain, but programmes have become more relaxed to avoid alienating students less prepared to tolerate overloading under the intense pressure of competition. Registration numbers are a moderating influence in the rapid increase of overhead costs. Most educational institutions attract students and maintain their good teaching staff by improving physical installations, diversifying options and extending extracurricular activities. Comfort, equipment, frills and diversity add to the 'reputation'. The quality of the teaching staff is not as visible, yet is nonetheless a competitive factor in prestige building. Good personnel demands premium salaries in a sector of depressed remuneration; in addition, some schools recruit holders of outstanding credentials to add to the cultural image. In spite of the larger size of the student body and the use of cost-saving mass production techniques, a more individualized focus is proving to be an important factor in obtaining quality results.

Educators rightly believe that success in quality schools reflects the pervasive effect of a positive cultural environment, a sort of protected incentive-space for learning; from this angle, teaching institutions are imagined as sovereign republics dedicated to knowledge, meanings and expression. This aggregate result is achieved by strengthening a complex array of strategic factors rather than betting on anyone in particular. The costs of this special environment has been rising steadily; it is true that specific items can be identified, but today it is significantly more expensive to create the proper ambience required by academic excellence. Teaching institutions have gradually adjusted to a clientele dominated by affluence values; they provide the proper signals to compete in those markets and provide the programmes to compensate for the dysfunctional influences that affect 'well to do' students.

No wonder that quality teaching has not spread down as expected. Instead, many services under attrition (mostly in the public sector) have deteriorated. In the more relaxed curricula designed to adjust to modern educability margins, character formation has lost priority; without proper family socialization, schools seem to be poor instruments to strengthen values in emotionally less-stable young

people. Deserting character formation is the underlying general consequence of lower educability.

THE HUMAN CAPITAL PROSPECTS

Educational systems are under heavy pressure. It seems that the equity foundations of universal schooling have been undermined by globalization trends. The gradual weakening of national societies is affecting institutions, interactions, behaviour and values. Businesses, economic policies, audiences and information flows are no longer circumscribed by parochial incentives. The ideal of an abstract community of citizens as an ethico-political frame for co-operation and security is not functional for societies of uncommitted individuals. Providing everyone with cultural tools to participate in a commonwealth bounded by history, fair institutional arrangements and the general acceptance of a common fate seems to be on the way out. The preservation of a national culture is a secondary priority in most countries today. Instead, 'modernization' has become the cherished theme of groups more concerned with competition, affluence and preferences for expediency and direct action.

From the modernization point of view, the role of education is the programming of individuals to perform at different productivity levels. This restricted idea of human capital formation has been recently popularized by international financial institutions as a realistic answer to the economic attrition in school systems. The consequences of this approach are becoming evident in programme design and in analytical projections to define goals and approaches. Let us review some of the implications.

First of all, a sustainable global system requires specially trained personnel. To interact in this powerful and high productivity circuit calls for quality and flexibility. Existing proposals emphasize the provision of individuals with multiple but nevertheless flexible specializations. They require dexterity in symbolic analysis, a difficult objective to achieve because it exceeds traditional professional training. Symbolic analysts are thought to be the product of a new educational blend: on the one hand a sort of classical education (to develop critical thinking, historical perspectives, the ability to organize and express complex ideas, understanding of multivariable and dynamic social realities, cultural awareness and ethical concerns); on the other hand, some sophisticated modern skills (quantitative and systems analysis, information management, rational conceptualization of chaotic sets). The formation of these 'flexible specialists' is supposed to define the future world standard of excellence.

Secondly, to satisfy local needs. These vary from country to country. In each case, the standards are different. While global careers are for a few, local systems take care of large numbers, they are heterogeneous in composition, quality and output; they constitute a loose system. Elite training defines the local standards of excellence in today's parochial societies, but in addition to this socially specialized education network, there is a mobility circuit to care for the training of upwardly

mobile students at different stations on the social scale. The mobility products represent a lower educational quality, more strictly related to specific levels and qualifications.

Thirdly, the non-quality training required by those individuals in the low-productivity local economy. They need few simple skills to be marginally competitive. Schools are supposed to programme them to obey rules, react on time and work in subordinated positions within the margins of simple productive systems.

The programming of individuals to satisfy the human capital needs of a globalizing world is based on the idea that economic returns are related to a highly stratified employment structure of world dimensions: the more global the positions, the smaller the numbers required and the larger the productivity and individual incomes generated.

This is perhaps the most startling conclusion. The value of human capital—like any other capital—is determined by relative scarcity and alternative uses. From this perspective, an excessive supply is wasteful because the openings are limited and the declining returns kill the incentives to continue investing. These constraints define the limits of the role of education as a trainer of individuals for direct economic productivity purposes.

While the creation of employment positions is a quantum conditioned by the amount of investments and the choice of technology, the supply of educated people depends on expectations, equity considerations, public subsidies, private means and families' elasticity to substitute other investments and consumption. It is easy to increase the numbers of educated individuals when people are motivated and subsidies are made available. This is the conventional strategy to expand according to objectives. Normally the production of human capital is regulated by motivational lags and economic differences in access.

In the globalizing scenario, the diversity of projected economic needs creates heterogeneous educational demands. The most productive ones satisfy non-local needs. The idea that the global economy constitutes an integrating social factor is still a long-term hypothesis; in the short term, social differences seem to increase and local solidarity to weaken. In fact, the social demands for education have become highly particular. Teaching institutions are gradually responding to a plurality of economic requests coming from people of different social origins, interests and life prospects. The consequences of this evolution are teaching systems for separate classes. This is a complex set-up; educational products today are mostly the result of self-regulatory mechanisms related to income and motivation differentials. Families are increasingly buying the educational level and quality they can afford or alternatively, influencing the public sector to respond to their special needs. It is obvious that cultural benefits will tend to accumulate in those groups with better initial advantages. Poor sectors do not have the proper motivations, the means and the political capacities to influence public decisions. They are bound to remain a residual problem in the educational dynamics of the global economy.

THE POST-ADJUSTMENT

The educational adjustments to global trends do not contain a major challenge. Only poverty emerges as a warning that something has been left out. The educational adjustment issues require good 'plumbers' to repair damage, reorganize processes, improve efficiency and satisfy specific needs. All of the above are indispensable to keep the services running in the best possible way and there is a lot to do. Given the climate of economic attrition, these operational priorities deserve attention and energy.

But educational adjustments are not everything. On the one hand, they provide clues about broader issues. However, they also tend to reduce educational goals to management issues; moreover, the assumptions are too restrictive, most of the time the role of education is narrowed down to economic productivity. There is little substantive guidance to be extracted from these approaches: they seem to preclude open discussion of the role of formal education in the socializing processes of a more insecure and interconnected world.

The socializing of individuals to face life challenges is perhaps more perplexing today than forty years ago: survivalist values have steadily replaced longer-term assessment of underlying meanings; the work ethic has been eroded by job instability and privilege and the value of thrift by affluence. Doubts about the fairness of social rules together with trust in the effectiveness of direct action have both increased. Finally, there is less faith in the capacity of elected authorities to respond to their constituencies' needs or provide adequate leadership.

In addition, formal learning processes compete with alternative and sometimes contradictory meanings generated in today's complex experience:

1. A collective identity seems to be no longer a central factor in education. The perception that the covenant of order does not necessarily imply the provision of opportunities, of social fairness and of universalistic commitments, has contributed to a new realism. The experiences of globalization highlight the new importance of class loyalties, networking and association with powerful interests to achieve some degree of security. In a social environment of unbounded competition, economic and political hazards are systemic and to be expected.
2. The modern culture of information has contributed to a change in the images of social interaction. In high-density information environments, people have got used to the idea that behind the appearances there are hidden networks of special interests and very few organizing principles. Therefore, it is unrealistic to draw general maps; instead a multiplicity of single routes for specific objectives seems to be a better representation of guidance to survive. To be idealistic without a north in a world of pragmatists with clearly defined strategies is a daunting task indeed.

The high density of signals and messages has also produced information saturation. The images developed by saturated audiences are powerful and influential today. They emphasize that in a world ruled by increasing randomness,

order is possible by gradually closing the alternatives. Pre-conceived beliefs, analytical parsimony and political correctness help to sample out reassuring signals to stabilize meanings and to establish hegemonic criteria for decision making. At the core of this perception is the search for order based on self-contained narrow notions, in contrast with the open-ended experiences of complexity construed as unmanageable chaos.

3. Finally, the gratifying images and sounds of commercial culture convey the feelings of direct action as a liberating experience from the constraints of rules, history and space.

Present trends are easy to follow. Emphasis on the instructional side of teaching is functional for institutions specialized in taking care of specific social groups, and consistent with short-term demands. I do not know whether this approach is sustainable over time, because it does require a high degree of conformity and integration in whatever is left of national societies. Perhaps a gradual increase in material well-being may contribute to a political climate of general resignation. But slack, complex communities bonded by the awareness that they have little or no control of their lives are difficult to keep together.

The educational challenges in this global age are not new. Firstly, there is the issue of social integration. There are clear signs that the global scenario weakens some strategic social bonds and generates new forces that undermine institutions and values. Should the schools assume an active role in the reconstruction of communities? The task calls for more 'intense' teaching experiences and extended social support. Is this a realistic expectation in a world culturally split by the effects of saturation information?

Second, if education must be a factor of liberation only for small groups, the new global culture will have to justify this ethical hazard, cooling down the dynamics of human aspirations. Intellectual justifications of inequality could be highly persuasive, but the experiences and anxieties of inequity are difficult to control. They generate a taxing pressure on stability and have negative effects on the quality of life of everyone. Globalizing societies are affected by significant social implosions today. If there is a slant in the distribution of legitimate 'liberation' factors, we are slowly learning that underground liberation processes emerge as normal complexities. Societies must adapt to the consequences of cults, fundamentalism, self-protection groups, violence and special cultures. These are vague issues with vague solutions. I believe that families, schools and communities have a role to play dealing with the causes, but this task is incompatible with the segregation of human creativity.

Third, if quality investment is a function of stability and social integration, it is the wrong strategy to programme individuals to perform as intelligent machines, unless everyone accepts that Huxley's 'Brave New World' is inevitable.

Notes

1. The views expressed in this paper are those of the author and do not represent those of the Inter-American Development Bank.
2. This paper is concerned with overall trends. This is not to deny the importance of local differences. In many countries, the lack of a well-established socio-political progressive paradigm to integrate groups and interests has facilitated the erosion of those values related to the local quality of life. This seems to be the case of the 'global reach' and 'total risk' situations, where the cultural and political effects of globalization seem to be more pronounced.
3. I have freely used some interesting ideas suggested in Lynn Ilon's article 'Structural adjustment and education: adapting to a growing global market' in *International journal of educational development* (Tarrytown, NY), vol. XIV, no. 1.
4. The forthcoming analysis is based on the idea that under certain circumstances, too much transparency may be counterproductive. Since the limitation today is in the receiving side rather than in the generation and transmission of information, it might be useful to distinguish maximum transparency from optimal transparency. Whether the provision of formal education may contribute in the future to reduce the gap between the maximum and the optimal depends not only on improving the social efficacy of school systems, but also on the political priority of achieving equity goals.
5. Non-fictional subjects can also be transformed into trivia and entertainment. Whenever politics, justice administration or private lives are publicized without a contextual argument, subliminal messages seem to prevail.

O P E N F I L E

SPECIAL NEEDS

EDUCATION

FOREWORD

Seamus Hegarty

Salamanca in June! What a happy inspiration on the part of the Spanish authorities and UNESCO to select this ancient university city as the venue for the 1994 World Conference on Special Needs Education: Access and Quality. For those fortunate enough to have attended, this conference was a truly special event. It combined professional content, good fellowship and opportunities for dialogue and networking to a remarkable extent. All of this plus Salamanca as well, whose many charms and glorious evening light were exceeded only by the relaxed hospitality of our Spanish hosts. A particular personal pleasure was walking across the ancient Roman bridge over the river Tormes each morning into the high-tech conference centre where every conceivable conference requirement was at our disposal.

The conference was designed to build on the Jomtien framework calling for universal education. By pulling together UNESCO's efforts and other work highlighting the woeful shortfalls in provision, and indeed aspiration, for those with special educational needs and by providing a platform for new thinking on special educational provision, it sought to place special needs education more firmly on national agendas.

Important though the new thinking is, conceptual frameworks on their own will not change the world. There was therefore a deliberate effort to draw attention to successful experiences and to present examples of challenging practice, whether at the system level of national legislation or at the micro-level of school organization. The conference also provided a forum for discussing problems and experiences, and it gave delegates the opportunity to establish or renew collaboration.

Seamus Hegarty (United Kingdom)

Director of the National Foundation for Educational Research in England and Wales. He has conducted extensive studies on provision for pupils with special needs in ordinary schools and has published widely on the topic. He edits the *European journal of special needs education and Educational research*. He has conducted numerous consultancies for national governments and for intergovernmental agencies, including UNESCO.

The conference generated a large number of papers setting out new thinking, reporting on research findings and describing practice. The purpose of this special issue is to make available to a wider audience the key papers presented and to disseminate a number of associated papers of interest. These are grouped under four headings: organization and policy at national and regional levels; teacher education; school perspectives; and community perspectives.

In 1993 UNESCO gathered information on legislation relating to special needs education from fifty-two Member States drawn from each of the UNESCO regions. A full report based on a thorough analysis and synthesis of this information is being prepared and will be published in 1995. However, the first section is introduced by Maria Rita Saulle's paper which provides an interim summary of the key issues emerging from national legislation, focusing particularly on legislative provision, integration and administrative structures.

The paper by Alvaro Marchesi Ullastres presents the reform of special educational provision in Spain. This was a carefully planned process, commencing in 1985 on a limited basis and gradually extending across the whole country. This is a valuable example of change at national level, demonstrating how one country achieved significant improvement in its special educational provision in a relatively short period of time. It also shows that inclusive education and high-quality provision are consonant with one another. As the architect of the scheme and its director from the outset, Professor Marchesi is uniquely placed to describe the process and draw attention to the conditions required for successful implementation.

The two papers by Evans, and Blanco and Duk present information from cross-national studies covering OECD member countries and Latin America. The study by the Organisation for Economic Co-operation and Development assembled twenty-one national position papers, sixty-four case studies on different aspects of integration from nineteen countries, and a review of the research literature on integration. Peter Evans draws on this material to illuminate the development of successful integration policy and practice. He also presents some challenging statistics on the variability of practice from country to country.

Blanco and Duk provide an overview of the situation in Latin America. While some progress has been made in terms of basic provision, much remains to be done regarding curriculum development, teacher training, resourcing and early childhood education. The paper also describes initiatives towards integration in Peru.

Special education in Nicaragua presents a very different set of issues. Gary Miron draws on his work in the country to set out the challenges to be addressed. Despite rapid expansion in recent years, there is still a serious shortfall in special educational provision. Teacher training and retention are seen as key areas for action, but any changes are likely to depend on political and economic developments.

Education must encompass preparation for adult life and participation in the labour market. This is more important for students with disabilities than for others. Ruguera discusses the structural and other factors that determine access to the labour market and highlights the contribution that education can make to facili-

tate access by young people with disabilities. He presents examples of how the transition from school to adult life can work, particularly from Australia, Denmark, Nigeria, and the United States.

The second section is concerned with teacher education and contains papers by N.K. Jangira and Mel Ainscow. Professor Jangira describes ways in which both pre-service and in-service education can be modified to help all teachers acquire the knowledge and skills they require to respond to special needs in the classroom. He presents details on course content as developed in India and describes the impact of staff development at school level.

One of UNESCO's major activities in special needs in recent years has been the teacher education project 'Special Needs in the Classroom'. Mel Ainscow, the project director, describes the work carried out and how the materials developed are being used. The amount of trialling and development work in different national settings is noteworthy, and undoubtedly contributed to the efficacy of what has become a highly regarded set of resource materials for teacher education.

Section three turns to school perspectives. Margaret Wang highlights the importance of instructional effectiveness, i.e. good teaching, in ensuring that all pupils learn. Reviews of research on the variables that influence learning demonstrate clearly the primacy of instructional variables. This underpins her argument that pupils with special needs, like other students, simply need effective instruction to enable them to improve their attainment; they may require more instruction and in a more intensive form, but they do not need a different kind of instruction.

Gordon Porter discusses organizational issues relating to pupils with special needs in Canada. Key features at district level include visionary leadership, appropriate resource allocation policies and competent support services. At school level the deployment and role definition of school-based special education staff are seen as critical. Combining in-service education with curriculum development is found to be highly effective.

The final section deals with community perspectives and especially with community-based rehabilitation programmes. Brian O'Toole outlines the case for the emergence of community-based rehabilitation and indicates how initial thinking has been translated into a host of practical programmes. He describes in detail the 'Hopeful Steps' Programme as developed in Guyana. Ofori Addo provides examples of community-based rehabilitation in Ghana. These two papers demonstrate the vitality and flexibility of community-based rehabilitation as a model of provision; apart from mobilizing community resources in a constructive and fulfilling way, it helps to meet the needs of people with disabilities when more traditional approaches are impotent.

* * *

Taken together, these papers constitute a valuable addition to the literature. New thinking and successful experiences need to be disseminated widely in the interests of improving provision everywhere. The global compass of these papers and their combining of theory and practice makes them a key resource for all concerned with improving educational provision for children and young people with disabilities.

LEGISLATION ISSUES

Maria Rita Saulle

Introduction

The right to education is a fundamental one for every human being. When it was drafted, *The Universal Declaration of Human Rights* had only a theoretical value, but it has since acquired a compulsory one, and is now the source of all international legal instruments in the field of human rights.

Since 1981, which was proclaimed by the United Nations as The International Year of Disabled Persons, many countries have enacted laws or provisions which have aimed to give a practical dimension to the principle of full participation and equality. Therefore, the principles formulated by the United Nations in 1981, and confirmed by UNESCO, were embodied in the legislation of many countries which had previously ignored them.

More recently, the UN resolution 'The Standard Rule on Equalization of Opportunities for Persons with Disabilities' was adopted by the General Assembly at its forty-eighth session in October 1993.

The material discussed in this article is based on a UNESCO study, currently being finalized, which is primarily concerned with legislation related to the provision of special needs education (UNESCO. *Study on legislation pertaining to special needs education*. Paris, in press). Eighty countries were invited to contribute information and fifty-two countries responded.

Maria Rita Saulle (Italy)

Professor of International Organizations at the Faculty of Political Sciences, University of Rome-La Sapienza, as well as a teacher at the Libera Università degli Studi Sociali in Rome. Her field of expertise covers public and private international law, the European Union laws, and the subject of human rights. She has devoted a large part of her research to the rights of disabled persons. She has participated in a number of United Nations consultations, as well as for other international governmental agencies, on issues related to the rights of women, children and the disabled.

The issue of legislation pertaining to the education of disabled persons deserves special consideration; particular measures are required in order to respond to the needs of disabled people and to ensure that they have equal opportunities and equal rights. For this reason, the laws or the dispositions included in laws which attempt to achieve equality should be viewed positively and evaluated from this perspective.

Legislative provision

LEGAL INSTRUMENTS

As part of the UNESCO study mentioned above, the fifty-two countries which responded submitted information on more than 140 legal instruments addressing the topic of disability. Certain common features can be identified, but there are also significant differences between countries and regions.

In almost all countries, the legislation included an article defining the right to education for all, including disabled persons. This was typically formulated in a very general way, not specifying type of provision, organization or content.

Furthermore, most countries also have elements within their education acts which concern special education. These range from concrete directives to loose suggestions. The specific directives relate to issues such as organization, identification procedures, accessibility, financing and curricular content.

In some countries, the legislative provisions can be labelled 'frame laws'. These laws contain conceptual elements and principles, on which the issues connected with disability are based, and prescriptive ones, which project how these issues could be formulated into state laws or administrative regulations. The frame laws also contemplate the formulation of regional laws and municipal administrative regulations to achieve full integration of disabled persons in school, at work and in society at large.

Finally, and with a specific caveat derived from common law systems, as many as forty-one instruments might be termed 'third level norms' of the most diverse origin and strength. These instruments range from the 'ministerial decrees' favoured by countries like Belgium, Chile, Colombia, Costa Rica, Italy and Spain, or the 'presidential decree' chosen by Greece, to the usual 'law by decree' favoured by Cuba, Portugal and Romania and the 'regulations' chosen by Bulgaria, Ireland, Japan and Venezuela.

The data provided by the countries in this study demonstrates that, within the last ten years, nearly all countries have either made changes to previous education acts or have passed new legislation pertaining to special needs education. Some countries are still in the process of refining new legislation

However, there are certain regional differences in the formulation and provision of legislation. Of the total fifty-two countries included in the study: nineteen came from Europe; thirteen from the American continent; nine from Asia; seven from Africa; and four from Arab States.

When taking account of the relative percentage of countries between the regions, it is clear that European countries have come further than other regions in implementing and taking account of new thinking in drawing up legislation pertaining to special needs education. This point is, of course, connected to the fact that some of these ideas have been formulated within a Western European context. For example, some European countries (such as Italy and some Scandinavian countries) have made definitive breakthroughs in large-scale integration projects. In a considerable number of countries in other regions, as well as in some European countries, integration has begun to be promoted through legislation, but has not yet been implemented.

It is therefore important to consider how educational reform can be achieved through legislation. The strategy in most countries is for new thinking to be reflected in clear policy statements, followed by legislative measures and a framework for concrete application. In many countries it seems that there is a problem in progressing from the legislative level, which often defines special needs education within the general context of human rights and educational aims, to the concrete level of everyday life for the people concerned. However, there are a few examples of the opposite strategy. For example, here in Spain, changes in the educational provision for disabled persons have grown from initiatives at the grassroots level to generate new legislative provisions.

COMPULSORY EDUCATION

Thirty-five of the fifty-two countries took the care to specify that education was compulsory for all. These statements should be interpreted with caution for, even in countries where education is technically compulsory, it may be that many children do not attend school—either because provision is limited or because the enforcement does not reach them.

Furthermore, even though it may be stated in legislation, it is probable that there would be *de facto* exclusions relating to disability; only a few countries confirmed that no disabled children were excluded from education, while other non-quantifiable information would suggest that in certain countries some children do not enter the education system at all.

Frequent reference to the degree of disability tends to suggest that, aside from theoretical statements, the dividing line between pupils mildly affected who successfully partake of the advantages of education, and the ones most seriously affected who are excluded rests on practical considerations perceived at local level. Some of the countries did specifically quote the availability of resources as a varying criterion for discrimination.

About half of the countries (twenty-five) attempted to define categories of disability in their legislation. They also stated who regulates the identification procedures and assesses the degree of a given disability. This can be seen as an attempt to give directives for the division of children according to their disability, and concerns their placement in special schools and special classes. Although integration

was promoted, special schools and special classes were mentioned in about 70% of the countries' legislation. This type of provision frequently concerned specific groups, such as visually and hearing impaired children and those with severe learning difficulties.

VOCATIONAL EDUCATION

About 35% of the countries in this study also mentioned vocational education as an important aspect of special needs education. There appears to be a need to reinforce this aspect of provision through legislation and the development of the relevant services.

Integration

THE MOVE TOWARDS INTEGRATION

As many as thirty-nine countries declared that they espoused the concept of educating disabled pupils within mainstream establishments as often as is possible. This policy was being followed by seventeen countries in Europe, nine in Latin America, seven in Asia and the Pacific region, and six in Africa.

'Integration' has several different interpretations. In some countries, it represents only an aspiration for the future and in others where provision is more advanced, it represents concrete field testing.

In this study, eleven countries advocated integration at all costs and did not appear to have any kind of special schools or classes. This position appeared to stem either from extremely advanced social policy decisions or, conversely, from the concrete notion that special schools are expensive to maintain for sparsely populated countries where universal schooling is not yet fully enforced. In countries such as these, the integration of children with minimal special needs into village schools is both more practical and relevant than segregated education.

At the other end of the spectrum, seven countries appeared to emphatically believe in the concept of providing separate services/centres for disabled persons, arguing that special needs pupils would profit from targeted care. Surprisingly, most of them supported the principle of integration.

Mid-way were two groups. When integration was not feasible, five countries opted for special classes and nine preferred special schools. Finally, eight countries openly declared that in their school system both special schools and special classes were provided, allowing children's specific needs to be considered on a case-by-case basis.

CURRICULUM PROVISION

Included in the issue of integration are questions concerning curriculum provision. Frequently, special curricula are developed to suit the needs of special disability

groups. In some countries, however, all children follow the same curriculum. Such national curricula are formulated as a framework which is then adjusted and interpreted at the regional, local and individual level. In such cases, special needs education is referred to within the general curriculum; the curriculum is made accessible to all pupils through the use of special equipment, technical aids, assistants and support services. In this way, disabled persons will have a stated right to follow the same curriculum within mainstream schooling.

It is the issue of integration that has most clearly been the basis for the changes in legislation during the last ten years. However, the principle of integration is described in legislation in many different ways, ranging from general formulations on rehabilitation and integration into society at large, to a stated integration policy for all within mainstream education with the concomitant implications for curriculum content, financial support and teacher training. The most common approach, however, is to have degrees of integration based primarily on the nature of the disability. A few countries (such as Australia and France) have stated certain principles for integration which direct the implementation of the legislative acts. One example of this is the state of Victoria in Australia, where the following principles have been stated:

1. Every child has the right to be educated in a regular school.
2. Provision should be organized according to student need rather than disability.
3. Resources and services should be school based.
4. Decision-making should be collaborative.
5. All children can learn and be taught.
6. Integration is a curriculum issue.

Administrative structure

By taking a look at the administrative structure for the field of disability as mentioned in legal instruments, it is clear that Ministries of Education are responsible for special education in the great majority of cases (forty-two countries): sixteen from Europe; ten from Asia and the Pacific Region; ten from Latin America; and six from Africa.

In nine cases, responsibility was shared with the Ministry of Social Affairs. A tendency seen in a few countries, Jordan for example, is a shift of responsibility for educational provision from the Ministry of Social Development to the Ministry of Education.

Additionally, twenty-four countries reported having some sort of local administrative autonomy, while eleven countries were organized at a central level. In Europe, eleven countries had opted for complete devolution of powers, while three were still organized at the central level but with a significant component of decentralization. Another eleven countries indicated that some form of responsibility was given to voluntary agencies.

In a discussion about the administration of special needs education it is important to include the issue of parental involvement. It is clear from the study data that parental involvement is far from commonplace. However, about 30% of the countries specifically indicated the need for parental involvement in administrative decisions.

Funding

The key issue of funding was addressed by thirty-two of the responding countries, highlighting the need to follow up policy and legislation with the allocation of funds. There was little detailed information provided on financing procedures, but generally special educational provision is financed by a mixture of funding from the state and local authorities, voluntary bodies and parents. State funding was the predominant source of financial backing; in twenty countries all special education appeared to be funded by the state, and in most others the major part of the budget was provided by the state. In a few countries, private financing played an important role. In Germany, for example, responsibility for special needs education is at district level and 27% of special schools are run by private groups.

Teacher training

Teacher training for special needs education and that which relates to the issue of integration is an important area. More than 50% of the fifty-two countries reported coverage of special education in pre-service teacher training. In some countries, the special needs input was optional, while a few countries reported opportunities for in-service training relating to special education which was available to teachers in mainstream schools. The range of training available for teachers in special education is extremely varied, ranging from compulsory college courses to on-the-job instruction available on an ad hoc basis—teachers are often encouraged to seek training opportunities, but are not always required to do so.

Conclusions

Following the analysis of the national laws submitted by the responding countries, a number of conclusions about legislation and policy making can be drawn, giving some indication as to what will ensure that disabled persons have a genuine right to education.

A key issue is whether the law or act of state should exclusively concern disability, as in the 1992 'Frame Law' of Italy, or if norms concerning disabled persons should be incorporated into more general laws, as in the case of Sweden, so as to draw them naturally into line with the legal evolution of each country. There are various reasons why the second option is preferable.

1. An argument of legal discipline would advise against basing derived legislation of an abstract nature on a constitutional tenet, which would essentially be a theoretical one.
2. It would avoid a stiffening of the rules relevant to disability, which would inevitably occur and counter the natural evolution of society.
3. It would constantly underline the topic of disability, which otherwise would be marginalized as it is in countries where stringent requirements originating from special bills are disregarded, since every year budget laws fail to secure the financial resources in order to carry out the initiatives foreseen by frame laws.

Only through measures such as these would disabled persons be able to exercise their right to education completely, aiming as far as possible for integration and avoiding formulae for segregation which marginalize disabled persons within education. One outcome of such a process should be assessment procedures which are as similar as possible to those used for other pupils, thereby ensuring equality of opportunity for disabled children.

Despite the development of a plethora of national legislative provisions, directives and regulations, as well as administrative provisions issued at local level, an effective right to education may not be secured without a mechanism for monitoring. This could be addressed through various means, such as: periodical inspections, nominating an ombudsman or attending to issues raised by the disabled persons, their families and pressure groups.

In general terms, it seems that most countries in this study have incorporated into their legislation the right to education for all, with about half of them including some lines promoting integration into mainstream schooling. At the same time, however, the traditional provision of special schools and special classes in some countries and the lack of access and quality education for disabled persons in others, remains typical.

The major differences between countries and regions relate particularly to the inclusion of innovative thinking and the extent to which legislation regarding educational provision for disabled persons is specific and gives concrete guidelines related to: the degree of integration; the implications for the whole school age population; a common administrative structure for all aspects of educational and financial provision; and the inclusion of special needs education in mainstream teacher training.

The above can encourage radical changes in national legislation relating to disabilities, the key factors being their content and their potentially binding nature. The work of UNESCO could achieve outstanding results in promoting, at the global level, the full realization of the right to education for disabled persons.

To persons with disabilities, the law is not only a reflection of society's attitudes; it is an effective way of producing necessary changes in the allocation of resources and in shaping human behaviour. Where law is established, it commands compliance. Ideally, the law recognizes persons with disabilities as potential con-

tributors to the socio-economic fabric of a country, rather than as merely passive recipients of special services and financial benefits.

SPECIAL EDUCATION NEEDS AND EDUCATIONAL REFORM

Alvaro Marchesi Ullastres

Introduction

Special education has historically played an important role in the awareness of student development, in students' learning processes and in changing education systems. Research studies about disadvantaged students have led to greater understanding of perceptive, communicative and cognitive processes, and have emphasized some of the relevant variables which influence development. Comparative research has mainly centred on children with serious visual or hearing impairment or those with problems concerning communication, co-ordination or intellectual development. The education provided for children with special needs has, on many occasions, been used as a reference point for many aspects of education, particularly school organization and teaching strategies. Moreover, it should be acknowledged that many of the changes and innovations which have appeared in different education systems come from the thinking, ideas and models of practice generated in the field of special education.

It is neither strange nor accidental that it should be so. Education for children with special educational needs requires a greater awareness of individual differences and greater use of all their abilities. The education provided has to be personalized, in tune with the learning rhythms of each student and based on co-operation between the different professionals involved. It must also involve

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Secretary of State for Education at the Ministry of Education and Science in Spain. Throughout his professional career, Mr. Marchesi has devoted great attention to special education. His concerns are not only on the political level, ensuring appropriate legislative measures, but also touch upon the quality of education for all—an inclusive education. Mr. Marchesi is a professor of education and developmental psychology, with a particular interest in language development, and has written a number of publications and articles. He has collaborated with UNESCO and other international organizations.

regular contact with parents. These are the ideal conditions for achieving quality education for all students. It is therefore understandable that when the mainstream school attempts to integrate children with special needs, it will at the same time have to contemplate a change in its delivery of education for all its students. This change or reform must start from the principles upon which special education is based.

Such a process has been developing in Spain over the last ten years, although its progress has been anything but linear. In 1985, the government approved a project for the integration of children with special educational needs, which was to be implemented over eight years and involved profound changes in mainstream school provision. Five years later, in 1990, and in all-embracing harmony with the proposals of the integration programme, Parliament sanctioned a new 'General law of the education system' which extended principles guaranteeing quality education for all students throughout the education system.

The integration project

PURPOSE AND SCOPE

The design of the integration project had to take into account the problems and limitations of the Spanish education system, the difficulty in changing educational practice, the importance of obtaining progressive acceptance throughout society and the need to dispose of the necessary economic resources for the whole process. In accordance with these criteria, the government approved an eight-year plan in order to modify schools progressively to facilitate the integration of children with special educational needs. This period of time was extended in 1992 for a further four years, to continue integration to statutory secondary education and vocational training. This project has been implemented in a realistic, gradual and continuous way, despite controversy regarding the most desirable rate of implementation.

The integration project had two main aims. First, to allow those children who were being taught in special schools to be admitted to mainstream schools. Second, to ensure that the latter could offer a better education to the 15 to 20% of students with learning difficulties by providing them with better resources and support. The Ministry of Education established a series of commitments to achieve these aims. The most important are outlined below.

Early education

The Ministry of Education assumed responsibility for creating professional teams comprising psychologists, educators, social workers and speech therapists. The role of the teams was to evaluate the educational needs of young children with more permanent disabilities and to encourage their integration into infant schools.

Commitment to schools with the integration programme

The Ministry of Education decided that integration should initially be introduced through the voluntary participation of schools. This option ran the risk of not sufficiently guaranteeing the rights of children with special educational needs to an integrated education. However, it has the advantage of producing more positive action from those schools applying for participation in the integration programme, and greater commitment from the educational authorities in encouraging an atmosphere of confidence and participation.

Participating schools and the ministry were committed to the following aims.

Schools:

1. To have approval of the project by the majority of teachers and parents.
2. To integrate disabled students in each class, beginning with the first year of pre-school education and the first year of primary education. Each year, integration would be extended progressively to the other years.

Ministry of Education:

1. To reduce the number of students per class.
2. To send two support teachers to each school in the first year, and another two in each of the four subsequent years.
3. To pay special attention to the schools with psycho-educational teams.
4. To encourage the necessary building modifications to facilitate integration of students with physical disabilities.
5. To organize teacher-training courses.
6. To give professional credit to those teachers who participated in the integration project.

Beginning in the academic year 1985/86, nearly 300 schools applied for voluntary participation in the integration project annually. Approximately 170 schools were selected each year. By 1994, approximately 40% of all primary schools were participating in the integration programme.

Curriculum flexibility

It was not possible to maintain the same curriculum once integration was introduced in the schools. Therefore, the necessary changes were made to enable teachers to adapt the curriculum to children's' needs.

Teacher training

The concept of integration requires that all teachers have a basic initial training for teaching children with special needs. Furthermore, a more specific training will be needed for those teachers who are interested in updating and completing their training.

Increase in psycho-educational teams

Approval of the integration project has led to a considerable increase in the number of psycho-educational teams. Their main functions are to evaluate the needs of children with special educational needs, and to collaborate with teaching teams to facilitate integration of these students.

Creation of the National Resource Centre for Special Education

This centre was created to promote the development of curriculum materials and to facilitate the design of teacher-training courses, new assessment models and models of educational intervention.

Changes in special education schools

The changes made were two-fold. The schools now take children with the most serious disabilities, and provide experience and resources to assist integration in mainstream schools.

Changes in social attitudes

Campaigns about integration were mounted involving television, the press and the publication of several reports. The purpose was to increase the level of information provided to the general public and to encourage more positive attitudes towards integration.

Evaluation of the integration programme

During the first three years, an extensive evaluation of the integration programme was undertaken.¹ It is not possible to report here in full the results of this evaluation, but the most significant conclusions are discussed below.

The most important result of the integration programme has been the increasingly positive attitudes of the educational community and of society towards the integration of disabled students into mainstream schools. At first, reactions from both parents and the public at large were negative, motivated by fear and mistrust. The gradual and voluntary development of integration avoided further negative reactions and contributed to their being overcome. The evaluation has confirmed that the current social attitude is one of support for integration, but there are still some problems and criticisms of some aspects of the programme. The most important change is that this criticism no longer questions the principle of integration; rather, the criticism demands that the ideal conditions for the achievement of integration are created.

The evaluation has also revealed that teacher training is one of the factors most valued by the educational community for achieving satisfactory integration and that its development has been inadequate. Teachers require training to enable them to instruct students with special educational needs in a mainstream classroom; this should be revised constantly. Just as important are teamwork and continually developing practice within their school.

The teacher has to develop four types of strategies to encourage students with special needs to learn. First, they must identify the educational needs of the students. Then teachers plan the curriculum into specific programmes. Third, they design the appropriate methodology to facilitate co-operative learning. And lastly, teachers co-ordinate the necessary resources.

When a teacher is able to develop these strategies, educational progress for students becomes possible, an atmosphere of trust is encouraged and more positive attitudes towards integration are developed.

In addition to the conclusions linked specifically to the integration programme, the evaluation has underlined two more general factors which play a determining role in the success of integration. The first (and perhaps the most important) is that the education of children with special educational needs may not be undertaken fully if, at the same time, the necessary changes are not made to the education system as a whole. It is the whole education system, and not just the aspects which relate to children with special needs, that should be reformed if integrated education is to be possible.

The second factor to be emphasized is that integration requires a new perspective in the school which is sensitive to the specific demands of each and every one of the students. Integrative education is not only the responsibility of those teachers who are committed to students with special education needs. It has to be the responsibility of the school as a whole, which has to rethink its educational approach, its organization, its assessment system and its methodology to enable it to provide effectively for children with special educational needs.

The reforms made to the education system should lead to the creation of a curriculum suitable for children with special educational needs, planned with care, adapted to the learning rhythms of the children and developed by competent and motivated teachers. One of the most relevant aims of educational reform and the genuine expression of quality in education is that all schools possess the right conditions for children with special needs to gain access to this type of curriculum.

Reform of the education system

THE LEGISLATION

The basic outline of educational reform in Spain was presented in 1989 in the 'White Paper for Reform of the Education System'. In 1990, Parliament approved the law which established the structure for the new education system and stated the main aims of the proposed change: to extend statutory education to all children, transform vocational training and improve the overall quality of education. The latter is the main point of reference for modifying education and for this reason, the new law included different commitments to improving quality in education. One of these was to encourage the integration of all special needs children into mainstream schools. The most relevant objectives are outlined below.

THE NEW CURRICULUM

The design of a new curriculum model was considered to be one of the most important factors in changing the teaching and learning process. This new curriculum had three main aims:

1. To adapt the aims and educational content to existing scientific, social and technological realities.
2. To allow teachers to develop their own individual initiatives when practising in the classroom.
3. To facilitate their adaptation for all students.

The last point is closely related to the integration of children with special educational needs in mainstream schools. It is the first time in Spain that the curriculum for disabled students has been included as part of the general curriculum.

The new curriculum is characterized by its openness and flexibility, despite the fact that it applies to the whole nation. Its design attempts to maintain a balance between an open curricular focus and the existence of a common national curriculum for all students, with specific development by each autonomous community. The teachers in each school have to adapt the prescribed curriculum to the cultural, social and geographic characteristics of their school. Working as a team, the teachers decide how to adapt the general aims to their own specific educational reality and the best way of distributing the contents—established for all educational stages—in each one of its cycles. They also have to decide on common criteria for student assessment, select the best materials and organize teaching tasks for the different learning rhythms of each student, but mainly for those with special educational needs.

PROFESSIONAL DEVELOPMENT AND TEACHER TRAINING

Professional development of teachers is one of the main factors linked to quality in education. It is difficult to encourage educational reform without taking into account the professional desires of teachers. It must be remembered that teacher satisfaction depends on different factors: salary, professional and economic incentives, training, working conditions and social recognition for educational activity. The success of reform depends, to a great extent, on the ability of educational authorities to meet these demands.

ORGANIZATION OF THE SCHOOL

The proposed curricular changes require measures aimed at guaranteeing better administration of schools. The new curriculum will give rise to greater organizational difficulties because it is necessary to include optional materials, to co-ordinate the different departments and to provide for the diversity of students. The reform puts greater emphasis on the role of head teachers, reinforces methods for schools which include a professional administrator, and is based on a model of flexible but effective management of teaching departments.

EDUCATIONAL AID

The new tasks required of teachers include the creation of educational and curriculum projects for the school, attention to individual student differences and the functions of tutoring and guidance. These tasks make it necessary to provide teachers with technical support from specialized psycho-educational teams and departments. The progressive extension of these teams and their ability to work with the teachers to formulate educational aims is one of the conditions for improving quality in education.

ASSESSMENT OF THE EDUCATION SYSTEM

Reform has emphasized the crucial importance of evaluating how schools and the education system function as a whole; therefore, the role of inspection services for supervising the functioning of schools has been enhanced. Additionally, the National Institute of Assessment and Quality has been established in which all autonomous communities participate. Their main aim is to evaluate the application of educational reform, establish national measures of quality and provide the necessary co-operation for education authorities and the schools themselves to develop their own assessment processes.

Conditions leading to success

The reform project has been planned in keeping with the move towards the integration of special needs students. The focus of this project is attention to student diversity and the suitability of the whole education system for meeting the demands of special needs students. One of the project's criteria for quality is 'equal opportunities for all students'. It is, undoubtedly, an ambitious reform. Adopted after five years of integration programme development and several years of debate with the educational community, it has been developing over a whole decade. Some people believe that the implementation of change over such a long period of time may reduce the desire to reform. The Ministry of Education considers, however, that profound changes in education take a long time and that speed should be secondary to guaranteeing the fulfilment of required aims.

Aside from discussions about the length of time over which educational reform should take place, it is important to examine the conditions needed to ensure correct application of the reform. These conditions must be considered within the current economic and social context: economic crisis, rising unemployment and the accompanying increase in competition to find work, the growing demands on the education system — which may not always be homogeneous, the greater presence of different cultures in Spanish society and schools, the increase in racist and xenophobic movements, the rising pluralism, and changes in values, human relationships and social organizations. If we cannot adapt the education

system accordingly, we run the risk of being outdated — maintaining attractive ideas but without any real influence.

People are demanding more quality in schools and choose those which respond best to their needs and interests. We are witnessing a subtle but real tendency to put more value on 'good education', associated with good academic results and an absence of children coming from ethnic or socially disadvantaged groups in the school. This needs to be recognized if educational reform is to be adapted to the new problems facing societies. The question now is: what must the education authorities do in order to improve the schools where integration takes place so that they are chosen by a growing number of parents?

The commitment to a school which is open to all runs parallel to rejecting other options which are detrimental to this kind of education: privatizing schools; admitting children according to their abilities or for economic reasons; and evaluating schools only on the basis of their academic achievements.

Active work is needed to improve the factors which encourage parents to choose integrated schools. This intervention must aim to do the following:

1. It must aim to give more autonomy to these schools in adapting the curriculum and organizing their pupils.
2. It must aim to supply more resources to these schools.
3. The intervention should aim to give priority to teachers in these schools, organizing teacher training for them and ensuring that more professional opportunities exist for these teachers than for those in other schools. For example, a new system introducing practical, school-based training for primary or secondary teaching students has now been approved in Spain. Training schools receive additional funds and their teachers have a higher salary for being tutors of the student-teachers. The teachers participate in seminars organized by the university and have a stable relationship with the relevant university department. When applications to become a training school are considered, those schools which are clearly open to all students are given priority.
4. It must aim to encourage these schools to design more attractive educational projects by providing more economic resources. For example, schools might provide extra-curricular sports, more intensive foreign language teaching or specific classes for artistic development.
5. It must send a clear message that integrated schools are looked after by the educational authorities and that they truly are quality schools.

This intervention programme must be reinforced with a balanced evaluation system. It would be counterproductive if, at the same time, the evaluation projects were based only on academic results.

A new support for school quality

Within this context, we should identify some quality performance indicators for an evaluation and also offer information about the schools which are good examples of educational quality. A balanced, integrative model can be identified which takes into account both the variables of process and the results expected from an organization with educational functions.

This model incorporates two variables of great importance which must be considered: the socio-economic environment in which the school is situated and the quality of management by the education authorities themselves. The first refers to the social and cultural characteristics of students who attend the school. Numerous research studies have shown that these are factors which significantly effect educational progress. It is necessary to control a preliminary variable such as this in order to avoid subsequent distortions of data obtained.

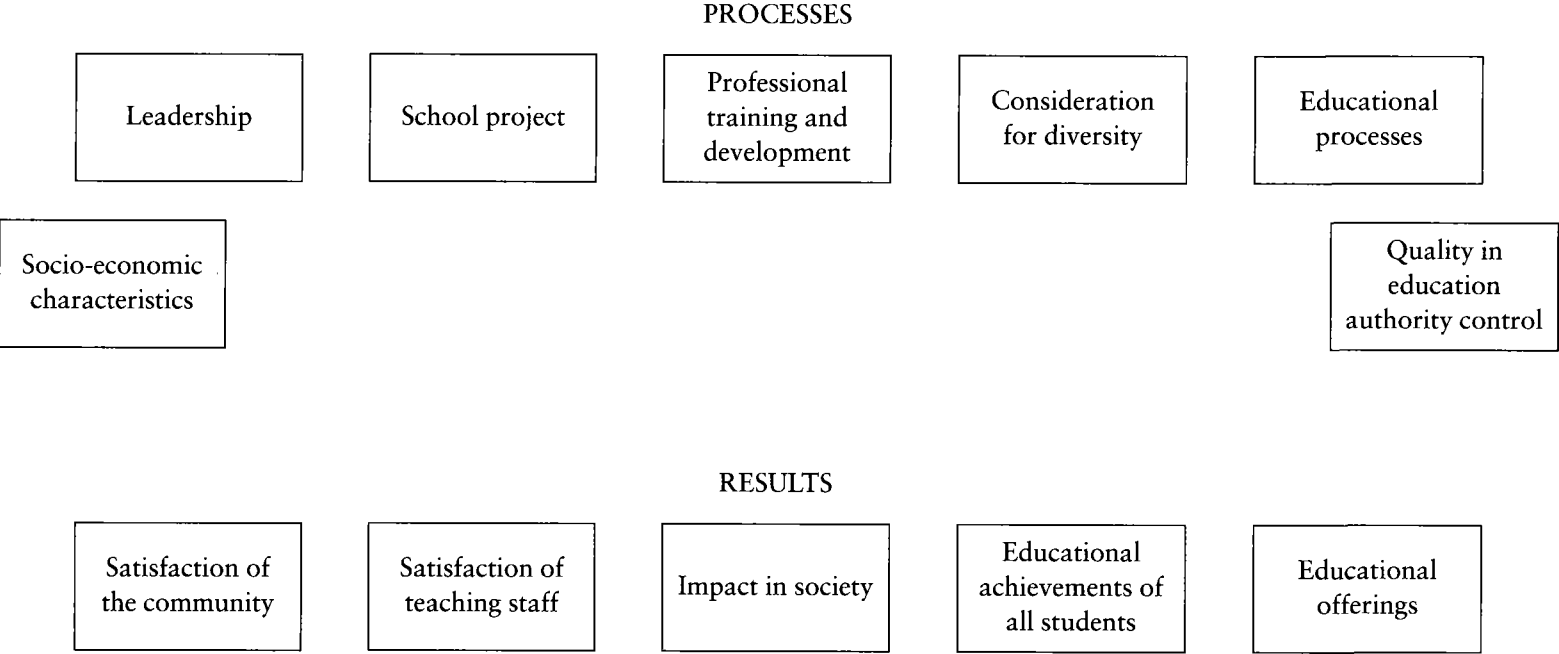
The second variable affects the control of the education authorities themselves. State schools are not independent islands with absolute autonomy. On the contrary, they are limited by: externally-imposed education policies; by the human and material resources which are available; by teacher incentives dependent upon their economic, working and professional conditions (which are regulated by the authorities); and by the margin of independent control established. Assessing the quality control of the authorities themselves is essential for correctly interpreting the results of school evaluations.

The proposed model revolves around two major spheres—processes and results—incorporating five points in each (see Figure 1). Brief descriptions of the ten quality indicators are given below.

THE 'PROCESS' SPHERE

1. *Leadership*. This includes the ability of the management team to: focus initiatives from the entire educational community; introduce educational projects; and establish communication systems to resolve conflicts.
2. *Educational project*. This refers to: the aims put forward by the school; the level of participation from the educational community; respect for established regulations; an atmosphere conducive to collaboration; and the working atmosphere which exists in the school.
3. *Professional development of teachers*. This includes: teacher training (individual or in teams); teachers' motivation in relation to educational change; and their interest in assuming new responsibilities or presenting new projects.
4. *Student diversity*. This takes into consideration: how sensitive the school is to adapting itself to the different abilities and interests of the students; the organization adopted; and the support systems for students with the most serious difficulties, especially those with permanent special educational needs.

FIGURE 1. Model of pointers for school assessment.



5. *Educational process.* This incorporates: innovative school projects; their assessment procedures; and the willingness to make changes after an assessment has been made.

THE 'RESULTS' SPHERE

6. *Satisfaction of the educational community.* This mainly concerns how parents and older students evaluate the project, as well as the extent of their participation.
7. *Teacher satisfaction.* This refers to what the teachers think about how the school is run, their working conditions and the fulfilment of reasonable expectations.
8. *Educational achievements of all students in accordance with their abilities.* This includes: the achievement of educational aims by students, both academic and those related to personal and social development; their ability to work as a team and their participation in school activities; all this in accordance with the abilities of the individual student.
9. *Impact in society.* This concerns the relationship of the school with its environment and the level of collaboration with other institutions: the town council, associations, professional centres or places of work.
10. *Educational offerings.* This concerns all extra-curricular activities: optional subjects, nature activities, projects with associations which are linked to the school, languages, adult education, etc.

The finalization and application of this model, through development of each one of the indicators with more specific criteria, will lead to better awareness of the administration of state schools, raise quality and allow parents to make more informed choices when selecting a school for their children.

Note

1. A summary of this evaluation may be found in Marchesi, A., et al. Assessment of the integration project in Spain. *European journal of special needs education* (London), vol. 6, no. 3, 1991, p. 2.

INTEGRATING STUDENTS WITH SPECIAL EDUCATIONAL NEEDS INTO MAINSTREAM SCHOOLS IN OECD COUNTRIES

*Peter Evans*¹

Introduction

Between 1990 and 1994, the Organisation for Economic Co-operation and Development (OECD) extended its work on the integration of disabled children by looking closely at current policy and practice in member countries.² This work has been developed in three parts. First, twenty-one member countries provided reports on a number of aspects of policy, practice and provision. These reports covered the areas of educational organization, definitions and statistics, curriculum, teacher training, parental involvement and financial resources. Second, sixty-four case studies were completed in nineteen countries on aspects of practice relating to integration. The information provided was then divided into areas covering learning programmes, relationships between the individuals concerned, whole-school approaches, parental and community involvement, the roles of spe-

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cial schools, external support services and issues relating to training. This information has been published as a book (OECD, 1995). The third part of the work reviewed the research literature and has been published in the *European journal of special needs education* (Evans, 1993). This paper will draw from these publications and discuss the key aspects of this work as they relate to the development of successful integration policy and practice.

Background

POLICY

The majority of OECD countries have recent laws and policies which encourage integration. Austria, for instance, amended the School Organization Act in 1993, thus making it easier for special education to take place in mainstream schools. At the same time, it changed the role of special schools to include the task of co-ordinating measures at the regional level to improve quality and involve parents in determining provision. In the Netherlands, the Special Education Interim Act remains in force until 1995 and aims to encourage the transfer of pupils from special to ordinary classes whenever possible. In the future, legislation concerning special education will be subsumed within the Primary Education Act. Despite these developments it nevertheless remains true that, in all OECD countries, both special schools and special classes in mainstream schools have a major role in the provision of education for children with special needs.

DEFINITIONS AND STATISTICS

Despite considerable homogeneity in OECD countries across many facets of their cultures, there are still significant differences in education systems, definitions pertaining to special needs groups and in the extent to which integration has been adopted. All these factors have an impact on the practice of integration. The classification systems in use, as well as the terms used to describe disabled children, vary substantially from country to country.

Broadly speaking, two classification systems are used. The first involves a description of disabled children according to a set of categories of handicap or disability which have their origin in a 'medical' treatment model emphasizing the impairment or disability. This model, extended in various ways, is widely used. The conceptual framework of the World Health Organization's *International classification of impairments, disabilities and handicaps* (1980) is commonly employed.

The second system, which is being used more and more extensively, has been developed following the recognition that medically-based categories are inadequate for determining the placement of disabled children within the education system. Many disabled children have educational requirements which are not necessarily best met through special provisions designed for their principal medical

condition. For this reason, and following recommendations made in the influential Warnock Report (United Kingdom, 1978), many countries have abandoned categories altogether in favour of the term 'special educational needs' (SEN). This description has the advantage of allowing for an analysis of the child's educational needs and subsequent placement in provision best able to meet that child's needs.

These two descriptive systems have wide ramifications both in theory and practice. Derived as it is from a medical approach emphasizing 'treatment', the category model implies that the learning problems lie within the individual child. On the other hand, the definition of SEN recognizes that educational outcome is dependent on the interaction between the child, the education provided in school, and the influences of the home and community. Thus, the teaching and education offered in any particular school may have a crucial impact on whether a child is identified as being in need of special provision. The same child might be a candidate for special education in one school but not in another. In summary, it may be said that the first approach emphasizes absolute characteristics while the second prioritizes the relative aspects.

Despite which method is employed, there is still (even to the initiated) a bewildering array of terminology in use. For example, children with emotional and/or behavioural difficulties may also be described as having psycho-social disabilities, psychiatric difficulties, personality difficulties, deviant behaviour or serious emotional disturbance. Furthermore, different operational definitions appear to be in use even within particular disability categories such as visual, auditory and motor impairment—a point elaborated later. A wide range of descriptive categories is also in use. Some countries (such as Italy and the United Kingdom) use one, whilst others use ten or more (such as Germany, the Netherlands, Spain, and Switzerland). The New Brunswick Province of Canada classifies both gifted and disabled children as 'exceptional'. Clearly there are differences in the way in which countries assess children's needs.

There are differences between countries not only in the terminology used but also in the groupings into which they place children with various difficulties. For this reason, a comparison of one country's SEN population with another is rather complicated. For example, only two countries—Iceland and Spain—recognize the term 'autistic' in their statistics. Other countries presumably have children with similar difficulties, but classify them under another term, such as 'severe learning difficulties'. France uses two classifications for physical impairment, 'motor deficiency' and 'physical handicap', whereas most of the other countries use one term. There are countries which make a distinction between 'blindness' and 'visual impairment', and 'deafness' and 'hearing impairment' and others which do not. Ireland includes children of 'travellers'. In Switzerland, children whose first language is foreign are also included, but clearly these children with special needs would not for the most part be disabled or have an impairment as these terms are defined by the WHO. Presumably this group is included because an administrative procedure is needed to identify and obtain additional resources for them.

Despite the differences that exist, Table 1 assembles the available comparative data. The first column shows children with SEN as a percentage of the total school population. The second column shows those who are outside the formal educational system; the third those in special schools or units; the fourth, those in special classes. The fifth column estimates the total outside mainstream education by adding the figures in columns 2, 3 and 4.

Column 1 in the table shows the large differences between countries in the percentages of children considered to have SEN. They vary from 0.74% (Turkey) to 17.08% (Finland). The different descriptive frameworks that can lead to this situation have already been discussed. Following the Warnock Report, which was itself influenced by a number of epidemiological studies, it has become widely accepted that up to 20% of children, on average, will need special education at some point during their schooling. This contrasts to the approximately 2% who are included under the categorical model. However, it may be noted that many countries now include a category of 'learning disabilities', for example, dyslexic children, which increases the proportion to 4% and above.

Column 2 in the table reveals that, in a few countries, the responsibility for some children with SEN lies with agencies other than the education department; usually health and/or social services departments. This occurs in Finland, France, Greece, Ireland and the Netherlands. In France, some disabled children (1.38% of all children) are boarded in establishments run by the Ministry of Social Security. Nevertheless, a proportion of these children are educated in ordinary schools. There is also probably another group of older, disaffected children who have learning or behavioural problems and who do not attend school, but for whom statistics were not generally available. In Ireland, it was stated that 11% of the travelling community does not attend school.

Column 3 of the table reveals that the percentage of children educated in separate special schools varies considerably from one country to another. In Australia, Denmark, Greece, Iceland, Norway and Spain, less than 1% are educated in special schools. In Finland, France, Ireland and the United Kingdom between 1 and 2% are in special schools, and in Austria between 2 and 3%. In Belgium, Germany, the Netherlands and Switzerland, more than 3% of children are educated in special schools.

The proportion of children educated in other types of segregated settings in each of the countries is difficult to determine, since in some countries a large proportion of children with SEN is educated in special classes, which may or may not mean that they are segregated for a significant part of their lesson time. In some countries (for example, the United Kingdom and the United States), there has been a shift away from separate special schooling towards classes and support units situated in ordinary schools. However, it is difficult to estimate the degree of integration of children with SEN brought about by such changes. France also has increased the proportion of children educated in special classes both at the primary and secondary level.

TABLE 1. Proportion of children with SEN for whom provision is made in special schools and units, special classes and outside the education system.

	Percentage of total school population having SEN, for whom provision is made	Outside education	In special school and unit	In special class	Total outside mainstream
Australia	5.22	–	0.63	0.92	1.55
Austria	2.55	<0.1	2.55	<0.1	2.55
Belgium	3.08	<0.1	3.08	n/a	3.08
Canada (New Brunswick)	10.79 ¹	–	n/a	n/a	n/a
Denmark	13.03	–	0.65	0.98	1.63
Finland	17.08	0.14	1.85	0.83	2.82
France	3.54	1.38 ²	1.26	0.64	3.28
Germany ³	7.00	–	3.69	n/a	3.69
Greece	0.86	0.18	0.20	0.48 ⁴	0.38
Iceland	15.71	–	0.58	0.71 ⁴	1.29
Ireland	1.45	0.22	1.04	0.41	1.67
Italy	1.27	n/a	n/a	n/a	n/a
Japan ⁵	0.89	–	0.37	0.52	0.89
Netherlands	3.63	<0.1	3.63	–	3.63
Norway ⁶	6.00	<0.1	0.6 (schools and classes)		<0.7
Spain	2.03	n/a	0.80	0.23	1.03
Sweden	1.60	–	1.03	→	1.03
Switzerland	4.90	–	4.90 (schools and classes)		4.90
Turkey ⁷	0.74	n/a	0.28	0.33	0.61
United Kingdom ⁸	1.85	–	1.3	n/a	1.3
United States	7.00	–	n/a	n/a	2.90 ⁹

n/a = not available

1. This figure includes gifted students.
2. Children in establishments provided by the Ministry of Social Security. A proportion of these are educated in ordinary schools.
3. Former Federal Republic of Germany only (1989). The 7% figure is an estimate.
4. Part-time only; otherwise, in ordinary class.
5. Column one covers those children of compulsory school age.
6. Many more than the 6% quoted have individualized help for minor disabilities.
7. An estimated 14% of children between 0 and 18 years are handicapped.
8. England and Wales only.
9. This figure was derived by adding together children who were receiving a good to fair proportion of their education outside the mainstream as described in the detailed notes on the United States.

The final column of the table estimates the percentage of the school-aged population educated outside the mainstream. This had been done by totalling the relevant column entries where the exact figures are known. Not surprisingly, the figures reveal large differences between countries, varying between 4.90% in Switzerland to 0.61% in Turkey. These figures must be interpreted with caution. For instance, in Turkey, 14% of students aged 0–18 are estimated to have disabilities but only a small proportion would appear to be receiving special education within the mainstream.

In addition to all of these factors, the extent of integration varies between the primary and secondary stages. Table 2 demonstrates the differences for those countries who provided data in this form.

TABLE 2. Percentage of children in special schools by level of schooling.

	Pre-school	Primary	Secondary
Belgium	0.55	3.90	3.40
Finland	n/a	6.21	3.70
France	0.30	2.00	3.70
Greece	0.10	1.40	0.12
Ireland	n/a	1.00	0.90
Japan	n/a	0.33	0.44
Netherlands	0.71	5.64	2.48
Norway	n/a	0.21	0.38
Spain	0.50	0.90	0.20

n/a = not available

A primary/secondary breakdown is insufficient to reveal the differences from one age group to the next and so the reasons for variation in percentages across age groups differ from country to country. In the Flemish community in Belgium, numbers in special schools rise from 2.5% at age 7 to a peak of 4.8% at age 11, but then decline to 3.4% at age 15. In France, numbers rise from 3% at age 11 to 4.9% at ages 13 and 14 as the demands of the secondary curriculum become more intense. In Greece, secondary education is compulsory only up to the age of 15, and many of those with learning difficulties after elementary schooling transfer to secondary school, together with the ordinary students and without any special programmes. Consequently, the number of students with SEN and with special help at this level is relatively small.

In Ireland, the proportion is relatively constant at both stages. This may be due to the fact that a small proportion of children are classified as having SEN. These are the children who have more severe needs and who are identified at an early stage in their schooling. In Norway, where the percentage consistently rises from one age to another, with only 0.17% at age 7 and 0.52% at age 15, this probably reflects a year-by-year reduction in intakes to special schools, as the integration policy is progressively implemented.

VISUAL, AUDITORY AND MOTOR IMPAIRMENT

There are further inconsistencies with respect to sensory and physically impaired students. Comparing these groups is instructive because there are usually clear biological reasons for the impairments and because it might be expected that, in OECD countries with relatively similar health care, the prevalence might be expected to be similar.

However, the data tell a different story. Tables 3, 4 and 5 show the data for children with visual, auditory and motor impairments respectively. Additionally, they illustrate the placement of children by disability group for those countries which provided statistics in this form.

TABLE 3. Placement of children with visual impairment.

	Number of children	% of total school population	Number in special schools or classes	% in special schools or classes	Number in mainstream	% in main- stream
Belgium	903	0.04	598	66	308	34
Canada (New Brunswick)	163	0.18	6	4	157	96
Finland	188	0.03	40	10	370	90
France						
— blind	1 517	0.01	1 230	81	287	19
— partially sighted	4 920	0.05	2 677	54	2 243	46
Ireland	500	0.02	150	30	350	70
Spain* visually impaired	572	0.03	266	47	306	53
Sweden						
—blind	45	0.005	0	0	45	100
—partially sighted	900	0.1	0	0	900	100*

* 6-14 year olds in the area that is managed by the Ministry of Education and Science.

TABLE 4. Placement of children with auditory impairment.

	Number of children	% of total school population	Number in special schools or classes	% in special schools or classes	Number in mainstream	% in main- stream
Belgium	1 730	0.08	1 298	75	432	25
Canada (New Brunswick)	242	0.27	32	13	210	87
Finland	864	0.15	651	76	213	24
France	14 208	0.14	8 937	63	5 271	37
Ireland	2 200	0.09	700	32	1 500	68
Spain*	2 293	0.12	1 438	63	855	37
Sweden	1 800	0.20	810	45	990	55

* 6-14 year olds MEC area only.

TABLE 5. Placement of children with motor impairment.

	Number of children	% of total school population	Number in special schools or classes	% in special schools or classes	Number in mainstream	% in main- stream
Belgium	3 279	0.16	2 853	87	426	13
Finland	1 168	0.21	921	79	247	21
France	26 686	0.27	20 695	78	5 991	22
Spain*	2 986	0.15	1 930	65	1 056	35
Sweden	1 800	0.20	360	20	1 440	80

*6-14 year olds MEC area only.

Collectively these tables reveal some startling differences between countries. For example, in considering Table 3 (visual impairment), it is apparent that Belgium (0.04%) and France (0.06%) classify between two and three times as many children as being visually impaired than Finland (0.03%), Ireland (0.02%), Spain (0.03%) and Sweden (0.02%). Inspection of the tables reveals similar differences in the other disability groups.

There are three possible explanations for these observed differences. It may be that either the prevalence of these three disabilities genuinely varies between countries or that the differences are due to methodological factors such as definitions and the way in which data are collected, or that they are due to variations in educational policies and practices. In reality, it is likely that all these factors are involved. If this is so, then there are certainly some children with one of these impairments who would be so classified in one country but not in another.

Similar differences between countries emerge when looking at the placement of these children. Table 3 shows that in Belgium, 66% of visually impaired children are in special schools, whilst in Sweden, 100% are integrated. Such differences will inevitably be due to variations in policy and practice within the education systems of these countries.

Practising integration

Successful integration involves reform at a number of different levels of the system. The research carried out by OECD/CERI (Centre for Educational Research and Innovation) will be described under the following headings: the school level; relationships between actors involved; whole school approaches; the role of special schools and external resources; teacher training; parents; and resources. Examples from the sixty-four case studies in nineteen member countries are used to illustrate practice in these areas.

THE SCHOOL LEVEL

At the level of the school, the successful implementation of integration was influenced by a number of interdependent factors. Access to the curriculum is central

and the country reports identified three key types of access: that requiring physical adaptations to the buildings and their contents; access to learning; and access through funding.

Physical access

The need to ensure physical access to school buildings is at its most self-evident where children have physical disabilities and may require ramps, lifts, adapted toilets and so on if they are to be able to participate fully in the life of the school. Once in the classroom, they may also require special seating arrangements and modifications to equipment such as taps, switches, laboratory apparatus and computers. Similarly, children with sensory disabilities require devices to aid their hearing and vision. Some of these devices, radio microphones for example, need to be used by the teachers and by non-disabled children. Once the problems of physical access are solved, children with SEN can be integrated locationally, in the sense that they can be educated in the company of ordinary children. It is likely that they can also be integrated socially, as they are then in a position to communicate with their non-disabled peers.

Access to learning

The conditions for access to learning are more demanding. For children with sensory disabilities, amplification of sounds and magnification of images may not, in themselves, be sufficient to ensure their access to learning. The SEN pupils, their teachers and perhaps the other students may have to learn and use elements of a specialized communication system such as a sign language or Braille writing. Children who are limited intellectually may need to have spoken and written information simplified, to be allowed more time to complete the same amount of work, and to have certain more complex aspects of the syllabus left out. This process of curriculum differentiation implies the need for teachers to take a creative approach to classroom organization and task analysis. Additionally, school management must also be adjusted to allow teachers time to plan effectively and co-ordinate work with colleagues. This creative approach is difficult to achieve in countries where the content of each school subject is prescribed in detail, allowing teachers little scope to make flexible interpretations to meet the needs of children varying in age, ability and cultural background.

Access through funding

Access through funding can either facilitate or inhibit integration. In the United Kingdom, for example, the official system of compiling 'statements' about selected children's special needs can ensure that they are provided with special equipment and/or the help to support their integration into ordinary schools. On the other hand, the very process of tying funding to disability can, in some countries, serve to 'label' children and steer them in the direction of segregated special schooling.

RELATIONSHIPS

Good relationships between staff and pupils are clearly central to successful integration. A Belgian study indicated that individual teachers tended to have supportive attitudes towards integrated pupils. They are prepared to make the necessary adjustments to classroom organization and pedagogy and think of the presence of a visually handicapped child as a challenge and an enrichment. A Spanish study pointed to the importance of good relationships across the whole school and the importance of establishing good social relationships between staff. The work of the support team calls for a relationship which is professional but also social. The group must have credibility and be entrusted to perform the task well.

In the Spanish case, the presence of disabled children in the classroom had the effect of increasing the pressure on the classroom teacher by stressing increased adaptability towards classroom management and by requiring collaboration with the special needs teacher who is not present in the classroom for much of the day. A Swiss report, however, noted that this situation was viewed positively by teachers since it led to the co-operative planning of lessons and sharing in their delivery. This was reinforced in a Spanish study which showed that such collaboration improved teaching and evaluation skills, encouraged teachers to view children more positively, reduced their isolation and enabled them to share decision-making. It was also observed in a study from Belgium that the extra attention given by teachers to disabled children led to the development of an emotional bond between them, with the consequence that teachers prepared their lessons more carefully. In addition, the experience of the SEN teacher can help in the teaching of all children who experience problems from time to time. Interestingly, one study from Belgium suggested that the presence of disabled children had helped non-disabled children to work more independently. This outcome may have been stimulated by the teachers' efforts to help disabled children to be more independent.

There were problems. Parents expressed concerns about bullying and the fact that teachers might neglect the non-disabled pupils. However, a Swiss study compared the academic and social progress of able children in classes offering special education support with that of equivalent children in classes without this arrangement and found no significant differences. Thus they concluded that such fears were unfounded—a finding supported by a German study.

Some case studies did report that disabled children in integrated settings ran a risk of becoming socially isolated. A number of approaches had been adopted to help overcome this problem, including making special arrangements for grouping disabled children at lunch-times and social skills training, which included a 'special friends' after-school programme. A teacher training pack on social skills training, developed in Australia, was successful in facilitating the teaching of required social skills to individuals and small groups. The pack emphasized the need to teach social skills directly and not to assume that they will develop spontaneously; to establish in all children the need to recognize and value their own feelings and those of others; and to use strategies for incorporating social skills into whole-class

learning. There was also an emphasis on increasing peer acceptance and tolerance of children with disabilities.

Evidence from research in both Australia and the United States indicated that the extent to which disabled children are integrated into ordinary classes is closely related to the attitudes of teachers and staff.

- For many schools, positive attitudes are the result, rather than the cause, of integration.
- Most school-based integration initiatives are over-dependent on the good will and personalities of dedicated and creative staff.
- Children in ordinary schools providing for disabled pupils have more positive attitudes towards disability: girls are more accepting than boys and the older children are more accepting than younger ones.
- Enhanced attitudes toward people with disabilities dissipate rapidly without sustained exposure.

WHOLE-SCHOOL APPROACHES

The issues discussed above point to the importance of a whole-school approach if school integration is to be sustainable. The evidence presented suggested that success depended on a school:

- being prepared to cater to individuals rather than just offering standard programmes;
- involving members of the broader school community in decision-making;
- recognizing social and life skills, as well as academic achievement, as contributing to the success of a school;
- providing leadership through role models and clearly-stated goals;
- organizing activities designed to achieve the stated goal and periodically assessing progress made towards these goals; and
- offering a responsive programme of staff training.

A Swiss example reveals some of the complexities involved. Educationally disadvantaged children were given a major part of their education in mainstream classes. Teachers worked in teams of four—three mainstream teachers and one special needs teacher. Some of these children were monitored by a special teacher who also provided extra help. The team of four also taught together during an optional period one afternoon per week. Maintaining this plan required extensive co-operation between the four teachers. In addition, the special needs teacher met each class teacher fortnightly to discuss the children and every six months to prepare reports on the SEN pupils. All school staff attended weekly meetings to consider general school matters, as well as meetings with the educational psychologist every three months to plan support arrangements and meetings with parents. These arrangements resulted in a number of benefits. Disagreements between teachers diminished and some teachers were helped to see behavioural difficulties among the children as stemming partly from shortcomings in the school. Co-operation was seen to enhance the quality of the teachers' working lives. There were

some difficulties, including the complexity of the arrangements, the extensive time commitments, the need for further training in teaching integrated classes and a pay structure that discouraged the occasional exchange of class teacher and specialist teacher roles.

A different example comes from New Brunswick. Within a policy of full integration, an important feature of the organization of each school was the student services team, comprising the principal, a guidance counsellor, a methods and resource teacher and teaching assistants. The methods and resource teachers had a key role. They assist classroom teachers to develop individual programmes for disabled students and their role focuses on providing collaborative consultation, teacher-to-teacher support and assistance with problem-solving. The methods and resource teachers also receive bi-weekly in-service training from the district support services which are based outside the school. Teacher assistants provide one-to-one support for pupils with severe disabilities. Guidance counsellors focus on students' personal problems. Co-operative education co-ordinators arrange job placements for older pupils.

Ordinary schools where integration is taking place are unlikely to be isolated from the community or other support services. Formal networks have developed in some countries based on the schools' experiences, and this is a feature of the work in Switzerland and Canada described above. In the Netherlands, twenty-eight elementary schools formed a working cluster, whereby children could be transferred relatively easily to another school within the cluster where the expertise was the strongest and the staff could co-operate in the field of curriculum development.

The case studies paint a fairly clear picture of the conditions facilitating successful implementation of a whole-school policy. They include: national legislation which requires integration, supported by local policies and the allocation of resources conducive to integration; the promotion, monitoring and evaluation of the school's integration policy and practices; flexible organization of classes; learning programmes at various levels for both social and academic skills, and time allowed to develop them. Staff are needed with general credibility and SEN expertise who can support teachers and provide consultation services. All staff must also be given the time to consult, co-operate, plan, maintain and develop the relevant attitudes and skills.

THE ROLE OF SPECIAL SCHOOLS AND EXTERNAL SERVICES

Maintaining an increasing number of disabled children in mainstream schools clearly raises questions about what role the special school sector should now play. An Australian study concluded that special schools could provide valuable help to ordinary schools in the following ways. First, the staff from the two types of schools should carefully negotiate what support is required and how it should be offered. Second, the special school staff should possess the teacher training and consultancy skills needed; and third, the teaching strategies advocated should be demonstrated in practice and not just talked about.

For instance, the majority of children in Finland with visual impairment are educated in mainstream schools. In one example, the special school maintained records and helped in the planning of educational programmes. Links between the schools were maintained through a number of peripatetic teachers. They helped the teachers in the ordinary schools, met parents, advised administrators and acted as liaisons with the regional teachers for the visually impaired. The special school also organized on-site courses, usually lasting for about a week. These included training in Braille and visual mobility. They also organized courses for non-specialist teachers, which included information on the effects of visual impairment on learning, study techniques and the use of visual aids. They also ran a library of Braille books and sound recordings.

An example from the United Kingdom demonstrates that special-school-based support can also work for those children who are most difficult to integrate—those with severe learning difficulties. About half the children on the roll of special schools attended a mainstream school on a part-time basis accompanied by a nurse who assisted in the ordinary classes in which the children were integrated, thus compensating for the additional work imposed on the classroom teacher. Integrated settings were carefully selected—for example, play time, lunch, physical education, dance and a few other practical activities. One of the teachers at the special school also ran a much-valued outreach service, visiting children with learning difficulties in neighbouring primary and secondary schools, offering teaching, assessment, advice and help in the preparation of teaching materials.

External services giving more extensive coverage were reported less widely in the case studies, but when they are well-organized they are usually very well received. For example, a network of twenty-eight mainstream elementary schools in the Netherlands was reported to be maintaining a large number of disabled students in the mainstream who would probably otherwise have been in special schools. The education advice centre employed educational specialists, consultants and teachers who co-ordinated the development of an educational policy intended to maintain SEN children in the mainstream, ran in-service training in special education and supplied materials. Teachers were very positive about the support given and the scope for professional development that it offered. Furthermore, in line with a whole-school approach, the support operated across a wide range of the functions of the school, including curriculum, policy, staff development and resources.

Thus, the key issues for effectiveness for both special school teachers involved in outreach and for external services are that they need: to work in a climate positively disposed to integration; to develop the appropriate assessment, training and advisory skills; and to help teachers cope for themselves rather than be over-dependent on outside agencies. The main difference is that those working for outside agencies rarely have the direct responsibility for educating the children with whom they are concerned. In theory this gives them objectivity, but in practice they are generally employed by district or regional educational authorities with their own priorities. In this role they may function as gatekeepers to special schools.

TRAINING

Training is an essential component in developing an education system which can respond appropriately to the needs of disabled pupils, whether in an integrated or segregated setting. In a good proportion of OECD countries, teachers take courses on special education as part of their initial teacher training. Inevitably, patterns differ in detail from country to country. A range of in-service training is provided which again varies substantially across countries. It is apparent that training programmes are not, on the whole, evaluated either for their effectiveness (whether or not they secure their intended outcomes) or for their efficiency (whether they make the best use of available resources). This is an area for substantial development.

The case studies revealed a number of approaches to developing training for special needs education. In New Brunswick, the district's student support services team provided in-service training for groups of methods and resource teachers who then went on to teach those skills in their own schools to other teachers, thus utilizing the cascade approach. A central feature of the content of this course was the joint problem-solving approach to which parents were invited.

In Germany, a city-wide integration policy was supported by training. Teachers working in integrated classes were given time each week for training purposes. Sometimes such approaches can be regionally based and can use distance learning methods. In other cases the plan can be national: such as in Spain where the Ministry for Education sponsored a programme involving more than 400 schools, in which staff analyzed and prioritized their needs, drew up training plans and implemented them.

Training packages tested in Australia were reported to be popular. One action research pack allowed the teacher to draw on the expertise of a support group. For example, one teacher elected to work individually with a 6-year-old boy with reading difficulties. Her support group members were a special education support teacher, a university lecturer and a special programmes co-ordinator. The teacher was given release from class duties in order to implement the programme.

In summary, the following four clusters of essential elements of a comprehensive professional development programme were identified:

- *comprehensiveness of package content and design*: basis in theory and inclusion of awareness-raising material, information content, practical techniques, 'how to' skills and strategies for effective teaching for all students;
- *process of training*: experiential, expert presenters, opportunities for practice, feedback and follow-through and time for teacher reflection, debate and planning;
- *support aspects*: interactive training with other teachers, access to experts and on-going support of school visits, networking and exchanges of ideas with other teachers; and
- *teacher and school commitment and involvement*: teacher ownership of the training, affirmation of teacher skills, whole-school (joint staff) training, school needs analysis, joint action planning and endorsement by the school's principal.

PARENTS

In many OECD countries, parents have been a potent force in demanding education for their disabled children. In some cases they have pressed for integration; in others, for special schooling. In Denmark, for example, following an invitation in the 1950's by the government of that country, parents became involved in policy formulation and were instrumental in securing increased integrated provision for children with severe learning difficulties. Ultimately, they secured the transfer of responsibility for those children from the Ministry of Social Affairs to the Ministry of Education. Parents in many countries have formed groups to lobby for better services and the implementation of legal rights for their children.

On the other hand, some parents have reservations about integration. For example, some parents from Ireland, the Netherlands and Norway expressed concern about their children experiencing loneliness, neglect or victimization. They were worried that ordinary schools would lack the necessary facilities and expertise to provide for their child's needs. Parents of deaf children often feel that their children need a special facility in order to help them to learn sign language and to communicate with other hearing impaired children before moving into a more mainstream setting at a later age.

Parents' involvement in the assessment and placement of their children is sometimes prescribed in legislation. In the United States, for example, this has featured in the law since 1975 and in the United Kingdom since 1981. In Denmark, parents must consent, each year, to every aspect of the integration plan before it is implemented. However, parental involvement does not remain without difficulty and various writers point to gaps between rhetoric and reality (see Mittler, 1990). The need for confidentiality can lead to a breakdown of communication between the professionals themselves and then, inevitably, with parents.

Parents can also be involved to varying degrees in the day-to-day work of schools. In some cases they are allowed only to attend open days and to discuss their child with his/her teachers, or they may be more involved in a consultative process which broadens the discussion from mere scholastic progress to include attitudes and expectations. Meetings may take place in the parents' homes and ways in which the school and home can complement each other might be discussed. Finally, parents may also work with teachers for the benefit of the school as a whole by going on school trips, working in the classroom or on the parents' council. In these last contexts, the parents may need some form of training.

Parents have also worked in the field of transition, helping to establish work placements for their children. In the United States, for example, parents have set up work opportunities and group homes for disabled students and have lobbied successfully for policies to promote the employment of disabled people more generally.

In all OECD countries, parental involvement has undoubtedly been a driving force in the development of special education. In general, this force is in the direction of integration, although when disabilities are severe, parents may prefer spe-

cial schooling. Parents' rights to be treated as partners in the assessment and educational placement of their children are recognized in some countries, although in practice, professionals do not always ensure that these rights are respected. The rights, needs and preferences of professionals, parents and children do not necessarily converge and administrators should bear this in mind when considering reforms of special education.

The extent of involvement of parents in special educational provision varies considerably, ranging from token contact to full participation in classroom teaching and school management. Parents can play a very useful role in the challenge of developing curriculum access and differentiation by working closely with teachers. Success is likely to be dependent on changes in training arrangements for all parties.

RESOURCES

Estimating the financial resources needed for special education is fraught with difficulty. Comparing the costs of integrated provision with those of segregated provision is likewise difficult. It is then not surprising that little information in this area is available in OECD countries.

Funds can be allocated nationally, regionally or locally or in some combination of these three. In addition, there can be separate systems (such as in the Netherlands) or a single system (like in New Brunswick, Canada). Irrespective of the organization of funding, different methods are in use for the different children on a school's roll. At one extreme, the money can simply reflect the number on roll and the age distribution of pupils, taking account of the different costs of educating primary and secondary-aged children. Such a model implies that those with special needs are distributed evenly across schools, which is usually not the case. Even in large schools, such a model cannot allow for individuals with relatively rare disabilities which might make their education exceptionally expensive.

At the other extreme, an extra allowance can be calculated for each individual with special needs. This method should match resources to need. However, this is extremely time-consuming to administer and these costs may well offset any potential advantages.

Data received from the countries surveyed did not allow for precise analysis of how funds are allocated. It is probably the case that most arrangements involve a combination of the two extremes described above. In New Brunswick, funding is based on a block formula that assumes a given percentage of children with SEN. But there are exceptions under certain circumstances. In the United Kingdom, schools receive core funding with additional resources for those children with SEN statements. Unless allocation of resources makes due allowance for particular economic and geographical conditions, those with special needs may be penalized more than most. This, as some countries indicated, is particularly true when general funding levels are considered inadequate.

It seems to be generally established that educating children with SEN is more expensive than educating non-disabled students. In the United States, for instance, the average cost per child for special education was 2.3 times greater than that of ordinary education. In the Netherlands, the cost is four times as high on average. Children with greater levels of disability cost more than those who are less disabled. It is generally accepted that integrated provision is less expensive than segregated. However, there are difficulties in making comparisons—for example, ensuring that like is compared with like and that the total range of provision and resources are taken into account.

Nevertheless, questions arise as to whether particular forms of educational funding favour particular forms of provision. In the Netherlands, special schools are financed separately, and are funded more generously than ordinary schools for equivalent children. Thus, there is little incentive for ordinary schools to educate those with SEN. This model is now undergoing change and additional resources are being provided for disabled children attending mainstream schools.

In several countries, there have been recent moves towards decentralization of finances, with the bulk of the funding allocated directly to the schools. This has the advantage of encouraging schools to look after their own affairs. One reported effect, however, has been the difficulty in financing those special education support services—counselling and advisory services, for example—which can only be organized effectively at district or regional level and not at school level.

While the comparative costs of integrated and segregated special provision are extremely difficult to estimate, the limited evidence points consistently in the same direction. It appears that, for the vast majority of children with SEN, education in integrated settings is not inordinately costly and is, in any case, less expensive than placing them in special schools. Integration can be helped or hindered by methods of allocating funding. For example, funding to ordinary schools can be linked to integration programmes, includes realistic additional elements to allow for the extra costs of educating children with SEN, and can be sensitive to different levels of special need. If the implications of cost are linked with the finding that the academic progress of disabled children is as good in integrated settings as it is in segregated settings, then the argument for integration is substantially strengthened.

Concluding comment

The work reported above, taken from a wide variety of countries, suggests that in the right conditions many children who are currently segregated could be effectively integrated into mainstream schools. Although substantial work would need to be carried out in a number of different areas of education in order to maximize integration across a country as a whole, the potential gains both for disabled and non-disabled students alike would be considerable. It can be concluded, albeit tentatively, that integration is cost-effective and also offers the possibility for a more flexible use of precious funds for the benefit of *all* students.

Notes

1. This article represents the views of the author and cannot be interpreted as reflecting those of the OECD or any of its member countries.
2. The OECD Member Countries are: Australia, Austria, Belgium, Canada, Denmark, Finland, France, Germany, Greece, Iceland, Ireland, Italy, Japan, Luxembourg, Mexico, the Netherlands, New Zealand, Norway, Portugal, Spain, Sweden, Switzerland, Turkey, the United Kingdom and the United States.

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THE INTEGRATION OF STUDENTS

WITH SPECIAL NEEDS IN

LATIN AMERICA AND THE CARIBBEAN:

PRESENT SITUATION AND OUTLOOK

Rosa Blanco and Cynthia Duk

Introduction

In recent years important changes have taken place in the way special education is viewed and these are leading to new approaches to education in many parts of the world. The integration of students with special education needs in normal schools, as the essential route towards social integration and normalization, has become an increasingly concrete objective in education systems.

Until fairly recently it was considered that only students with some form of disability should receive special education and the best way of caring for them was to put them in special classes or schools where they could receive attention adapted to their special needs. Underlying this concept is the idea that students' learning difficulties are solely due to their personal limitations and it puts the accent on identifying the problem and prescribing the appropriate treatment. From this point of view, special education was a case of all or nothing because only students who had a definite disability could receive special attention, while many others who, for a variety of reasons, found it difficult to learn remained in normal classes without receiving attention adapted to their needs.

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This approach still exists in practice. However, for over two decades there has been a definite trend towards encouraging the integration and participation of persons with disabilities in all spheres of society, giving them the support they need within the framework of the common education, health, employment and social services structures, recognizing that they have the same rights as the rest of the population. This situation in the area of education has led to the growing development of education policies which advocate integrated schools in which all children learn together, irrespective of their individual situation.

From this perspective, it is no longer appropriate to speak of different categories or types of student, but of students who have a number of educational needs, many of which are shared and some of which are personal. Among individual needs, those which require specific or unusual measures are deemed to be special needs. For example, a student has special needs when for some reason (disability, maladjusted family or school background, emotional problems, etc.) he or she has learning difficulties that require the provision of educational services (curriculum, materials, special support, etc.) that are not the same as those needed by other students. Learning difficulties and, consequently, the special education needs to which they give rise, may be temporary or permanent.

Reference to special education needs means putting the emphasis on what schools can do to compensate for students' difficulties because this approach implies that difficulties in learning are of an interactive nature and do not only depend on the limitations of the student, but also on the environment and educational response available. It is not a question of providing certain students labelled 'special' with separate support, but rather of changing the curriculum and educational practice so that they are adapted to all students, who can make satisfactory progress according to their individual abilities and differences. The aim is to move towards all-inclusive schools where, as far as possible, all students attend classes together, irrespective of their personal, social or cultural conditions. Experience in many countries shows that the integration of children and young people with special education needs is most effective in schools attended by all the children in a community. Integrated schools provide an appropriate framework in which to achieve equality of opportunity and full participation, encouraging more personalized education, promoting solidarity among students and helping to improve the quality of teaching. In this approach, therefore, special education is not a parallel sub-system looking after certain students, but a combination of special resources serving general education for the benefit of all students.

Results and outlook

Insofar as the majority of countries in the region have fulfilled the primary objective of the Principal Education Project, namely to guarantee access to basic education, they have also managed to ensure that many children with disabilities attend school, either through the regular school system or in special schools. In general, however, there is little awareness of the true scope of the problem of disabilities

and the demand for education, and there are no clearly defined policies and specific strategies on how to deal with it. Lack of clarity regarding which students have special needs makes it difficult to plan and monitor the services provided and to allocate and distribute resources. In fact, statistics indicate that many of these children in Latin America attend school without any form of special support, thus helping to ensure that they fail at school.

The first requirement within the region, therefore, is to know what are the real numbers of students with special education needs, what are their problems, and how great is the demand for education, and then to draw up clear and decisive policies to respond to the most basic needs. Formulating a satisfactory policy on special education to provide education adapted to the ongoing special needs of students implies the presence of a number of conditions that have to be created gradually. Awareness of the situation in the region in relation to these factors is essential in order to identify the most important challenges to be faced when moving towards a situation in which special education is no longer a sub-system taking care of a specified number of children—those with disabilities—but is a combination of special resources which the system makes available to general education for the benefit of all students, thus helping to provide better quality education for all. For this purpose, we shall examine below the conditions that need to be in place in order to achieve this goal, the general situation in the region in relation to these conditions and the challenges to be faced.

LEGISLATION

The first step towards improving special education opportunities is the existence of clear legislation that allows appropriate policies to be drawn up and ensures the adoption and continuation of educational services for children and young people with disabilities. Appropriate legislation helps to clarify and formulate educational policies, specifies rights and responsibilities, and provides a frame of reference for the provision of education and the supply of services and resources.

The constitutions of all countries in the region recognize equality of rights for persons with disabilities and the need to integrate them in community life and normal schools. The realization and implementation of this recognition in educational legislation are, however, still inadequate. Although all the countries have legislation on special education, either as part of general educational legislation or separately, they do not all provide for school integration. In addition, the scope and nature of the legislation vary greatly. In some cases, it is limited to a straightforward declaration of general principles, while other legislation contains more specific regulations that automatically ensure enhanced coverage and better implementation of the action to be taken. Nevertheless, despite the legal lacunae existing, the predominant trend in the region is for children with disabilities to attend regular schools, except when their degree or type of disability makes it necessary for them to attend special education centres.

It is important that legislation should incorporate the new thinking on special needs and that the measures required to put into effect this new thinking should be introduced gradually. The majority of countries consider that students with special needs are those with a permanent physical, sensory or mental disability, extending the definition in certain cases to specially gifted children. In this respect, it can be seen that there is a tendency to consider special needs only from the point of view of the child, ignoring many students who, although they do not have personal limitations justifying special attention, have considerable difficulty in learning as a result of a socio-family background that has serious deficiencies or itself suffers from inadequate schooling.

The most important challenge facing the region in this connection is to ensure that all countries have comprehensive legislation that clearly defines which students have special needs, who is responsible for identifying and assessing these needs, what should be the procedures and educational methods used in schooling, what resources are necessary, etc? Regulatory texts on special education should as far as possible be included in general educational legislation so as to facilitate normalization, ensure equality before the law and access to services, making sure at the same time that the special needs of students are not lost sight of in the overall provisions.

THE ORGANIZATION OF SPECIAL EDUCATION AND SUPPORT

Another important factor in developing special education is how it should be organized within the overall education system and what should be the concrete form of the support provided by the educational authority. Administrative structures can, in practice, facilitate or, on the contrary, hinder the implementation of certain approaches. It is not only the provision of education that depends on administrative structures, but also its nature and quality. Appropriate planning of special education and effective support by the educational authority make possible the supply and rational distribution of resources, co-ordination among the various bodies involved, and the practical implementation of specific approaches. Services for students with special needs require a global and integrated approaches bringing together different authorities and institutions.

In all countries in the region, the education of students with special needs is basically the responsibility of the ministry of education, although in many cases responsibility is shared with other authorities, such as the ministries of social welfare, health, justice, etc. In the majority of countries, there is an organic structure or department within the ministry of education responsible for special education and this generally involves a sub-system parallel to that of ordinary education. In some cases, greater efforts are being made to integrate the special education sub-system in the common system. This should be a clear trend in order to ensure that special education programmes share the same regular education budget and school integration becomes feasible.

One essential responsibility of the educational authority is to draw up concrete plans on special education and school integration within overall education plans so that they provide a clear frame of reference and can be evaluated in order to introduce any improvements required. There has been very little progress in this respect within the region, although some measures have been taken, for example, in Ecuador, whose legislation includes a three-year National Plan for Special Education within the General Education Plans and a project to improve the quality of schools, which will be evaluated.

FINANCING

Financing is a key element in developing an appropriate special education policy. Although the special education budget varies from one country to another in the region, it is very low and in many cases comes from private institutions or international organizations, despite the fact that in the majority of countries it is stipulated that the State is the financing source. The situation of countries in the region makes it necessary to establish priorities and implement realistic national plans according to the resources available.

CURRICULUM

The existence of open and flexible curricula is an essential prerequisite for responding to the different needs of the students and the socio-educational conditions in which their teaching/learning process takes place. The response to the special needs of students can be found in a common curriculum, making the necessary adjustments and modifications, as the best way of ensuring equality of opportunity. A common curriculum is the expression of the cultural capacity and content which each society believes is fundamental in order to ensure that its future citizens play an active role in society, and schools should do everything possible to help their students fulfil their abilities to the utmost. It is therefore of vital importance to give students with special needs a balanced curriculum that takes into account their individual needs without losing sight of the objectives pursued in common.

Here again, the situation of countries in the region with regard to the subject under discussion differs greatly. In many instances, there is a parallel curriculum for special education, usually drawn up by the special education departments in ministries of education. In those countries where educational legislation and policies on integration are more comprehensive, consideration is given to the need to establish individual programmes for these students based on the ordinary curriculum. Efforts should be made to reach a situation in which there would no longer be different curricula, but one single curriculum for all those at school that allows the necessary adjustments to be made in order to respond to different contexts and individuals. In this connection, an important educational and curriculum reform movement is taking place in the region and it could go a long way towards promoting the integration of students with special needs in ordinary schools. Some

countries—for example, Argentina, Bolivia, Chile, Ecuador and Paraguay—have redrafted the common curriculum with a view to making it more open and comprehensive in respect of its goals and content, with a methodology that can respond to individual differences.

THE SUPPLY OF EDUCATIONAL SERVICES

The supply of educational services that respond satisfactorily to the special needs of students is another important factor in promoting an adequate provision of education. The variety of education needs of these students makes it necessary to establish a series of services which provide different educational responses. Some students can continue to follow the common curriculum, with the help of special material or staff, others may join in certain parts of the curriculum, while others only take part in certain activities, etc. The legislation must clearly define the different forms of schooling (full integration in the class, integration in some areas, some parts of the timetable to be given in special schools and other parts in common, special schools, etc.) in order to ensure that the necessary resources are provided and that students receive education that is adapted to their needs.

The provision of education within the region is mainly through special schools, whose services focus on the traditional areas of coverage (mental, physical, visual or hearing defects). In some countries the services have been extended to cover language problems, autism, slow learning and other types of problem, but often on the basis of definitions that are predominantly clinical and imprecise and according to somewhat controversial classifications. It should also be noted that special attention is concentrated in urban areas and that 32% of students attend private schools.

The trend towards integration of students with special education needs in ordinary schools is in its very early stages in the region. In general, experiences have been isolated and the educational authority has not provided any clear frame of reference. There are two main reasons for such a situation: firstly, the absence of more comprehensive and clearer legislation, together with concrete plans for implementing integration, mean that the strategies and resources required to achieve integration are absent; and secondly, the low level of investment by governments in education means that resources focus on the priority objective of providing compulsory education for the majority rather than satisfying the needs of a minority.

Countries which do have more comprehensive legislation provide different forms of schooling, usually special schools, full-scale integration in classes, combined integration, or integration in some extra-scholastic activities. In practice, however, the most frequent form is full-scale integration in ordinary classes or the creation of different groups with complementary activities. In this connection, it is essential to review the way in which this provision of education is operating in practice. In the case of full-scale integration in ordinary classes, the support and resources required by these students is not usually available and consequently their special needs are not satisfactorily met. Moreover, different groups do not corre-

spond to an integration model because they are usually groups of children who work slowly or are at risk of failing at school and receive 'compensatory' teaching separately from their classmates for a specific period, which goes against the philosophy of integration. It is necessary to move towards a situation in which the various forms of education become a reality, incorporating in legislation a clear definition of the characteristics of each form and the criteria governing education in each of them so that strategies can be drawn up and the necessary resources provided to put them into practice.

As a result of the inadequate provision of education in the various forms of integration, more than one-half of the children identified as having disabilities attend the traditional type of special school, even though it is widely agreed that only 10% of the total number of children with disabilities need this type of care.

In this connection, the report of the UNESCO Consultations (1988) states that, when demand is important and available resources are scarce, the educational needs of children and young people with disabilities cannot be met in special schools. Furthermore, the resources usually allocated to special schools caring for a specified number of children need to be looked at in the light of the widespread failure to provide education of quality. This problem cannot be resolved, however, without at the same time reviewing the educational facilities in ordinary schools because special schools have been set up precisely to deal with students who meet with failure in ordinary schools. The aim should therefore be to reinforce integration of these students in ordinary schools, revising and modifying those aspects which, at a particular juncture, exclude these students, whereas special schools should become less common and be closely related to the common educational objectives pursued by all students. As stated by Hegarty, the challenge of special schools is to find ways to share experiences and resources, incorporating them into a broader educational context.

EARLY CARE

Access to education at an early age is a decisive factor that makes up for many of the difficulties experienced by these students as a result of their disabilities. The availability of education at an early age is not at all common in the Latin American region because the most important priority is to ensure access to compulsory education. The scant availability of pre-school education for the majority is even more acute in the case of students with special needs, i.e. the children who most need it, not only because of their disabilities but also because in a large number of cases this circumstance goes hand in hand with poverty and an environment that has serious deficiencies which accentuate their disadvantaged situation. Only a few countries have provision in their legislation for educating children with special needs at an early age. Even though children under the age of 6 living in disadvantaged socio-economic conditions and children with disabilities are priority groups in the Principal Education Project in Latin America and the Caribbean, there is little provision for their education, and this is one of the main objectives to be pur-

sued in the region. In addition to increasing coverage and access to education at an early age, greater efforts have to be made to ensure that these students are taken care of in a normalized environment because at their age differences between them and their contemporaries are less important and the curriculum is better adapted to their needs.

VOCATIONAL EDUCATION

A satisfactory policy on special education should also cover the training of these students once they have completed their compulsory or basic education in order to facilitate their transition to adulthood, integration in the labour market, participation in the community and independence. The most important objective of school education is to develop the abilities required to be active members of society, in other words, to prepare for life as an adult. In the case of students with special needs, leading an independent life as an adult is of supreme importance and this means giving them appropriate training at the end of their compulsory schooling. Wherever possible, the trend should be towards giving young people with disabilities access to the generalized system of technical and vocational education, with the necessary modifications, without neglecting other possibilities for those young people who cannot benefit from integrated education.

The legislation of some countries affirms the right of young people with disabilities to receive vocational training with a view to integration in the labour market. In practice, however, the availability of such training is rare and not standardized. Training is usually provided through special education schools and in some cases there is collaboration between these and vocational training institutes. The most important challenge in the region in this regard is to extend the provision of training and adopt a more integrated approach based on rehabilitation in the community. In this connection, Costa Rica has embarked upon an interesting experiment which could serve as a frame of reference for the region.

PARTICIPATION BY PARENTS

Participation by the parents of children with disabilities in their children's education can greatly help to ensure its success. It is essential that they should collaborate in school activities, contribute to the assessment and planning of the curriculum, help with homework and co-operate in monitoring the progress of their children. Involving the parents is the first step towards facilitating the integration of the child in the family environment and in developing a community-based approach, which is of particular importance in developing countries. The involvement of parents is particularly important in early childhood because they are the first educators of their children at a young age.

Participation by parents in the education of their children is an issue that is virtually absent in the legislation of countries in the region, so it is hardly surprising that action in this sphere has been very isolated and is neither standardized nor

well-defined. Progress has to be made in this area, both from the legislative point of view and from that of the provision of services to facilitate and enhance participation by parents in the education of their children.

TRAINING OF TEACHERS

Providing students with special needs with an education of quality depends to a large extent on the training and professional development of the teachers and other professionals involved in teaching them. Initial teacher training and on-the-job training are essential elements in developing high-quality education. The concepts, models and plans for training in special education have to be reviewed in the light of new thinking on special education needs. This also means considering ordinary teachers to be important recipients of this training because they have not usually been prepared to assist students with special education needs, even though they play a vital role in the integration process.

In the majority of countries, training focuses on specialized teachers and does not pay sufficient attention to the training of teachers for ordinary classes. Training in special education is usually seen as a specialization that has different forms: specialized courses after regular teacher training; pre-degree courses; post-graduate or correspondence courses, etc. The main focus in training is on clinical and rehabilitation programmes, centred on diagnostics and special treatment for various disabilities.

Another important challenge facing the region is therefore to change the thinking on training in special education (objectives, content, recipients, forms, etc.), which should move towards a more interactive approach to learning difficulties, more closely related to the ordinary educational programmes and curricula. Some countries are reviewing the need for specialization to follow on from basic educational training, a trend that should be strengthened in order to give students with special education needs better care and to facilitate the joint efforts of ordinary and specialized teachers, because as integration becomes more generalized all teachers will have to have minimum knowledge of disabilities and how to arrange teaching and the curriculum in order to respond satisfactorily to the needs of these students.

RESEARCH AND DEVELOPMENT

Educating students with disabilities is a complex task that requires ongoing research into the nature of the educational needs resulting from the disability and on the best way of compensating for specific difficulties through education. It is thus essential to evaluate educational programmes and integration projects in order to introduce the necessary improvements. Research into special education in the region is not very developed. The explanation for this is that special education is not a priority and, as we have seen, it does not have sufficient resources nor the

framework or clear reference points that would allow the most important aspects requiring research to be identified.

Progress in this area implies the adoption of clear conceptual frameworks, the establishment of concrete plans, investment of resources and the involvement of various authorities. The educational authority plays an important role in evaluating these plans and projects.

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THE DEVELOPMENT AND CURRENT STATUS OF SPECIAL EDUCATION IN NICARAGUA

Gary Miron¹

Background and development of special education

Prior to 1979 there were few schools providing special education services in Nicaragua. The few available services catered to a small number of children with disabilities (approximately 335) and were largely private and expensive. The only state-sponsored special services for persons with disabilities before 1979 did not come from the Ministry of Education (MED), but from the Social Assistance Organization. Among the educational priorities promoted by the government after 1979 was an emphasis on educating those children with the greatest needs, including those with disabilities.

A special education unit was established within the Ministry of Education in 1979 to administer the new government-sponsored educational services for children with disabilities. Besides overseeing the expansion of special education services in the country, the Division of Special Education has established a diagnostic centre for the detection and evaluation of children with various problems, as well as a documentation centre for the maintenance and development of a resource and information base covering the area of special needs education. It is important to point out that besides the government-sponsored services, a variety of projects and programmes concerning persons with disabilities have been started up and supported by national and international solidarity groups and non-governmental organizations (NGOs).

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Since 1979, children with disabilities have increasingly benefited from government-sponsored education and health services. Figure 1 illustrates the expansion of formal and non-formal special education services from 1979 to 1995. Formal education services include segregated special schools and integrated provision in regular schools. The non-formal special education services include the community-based programme for the early detection and stimulation of children with disabilities.

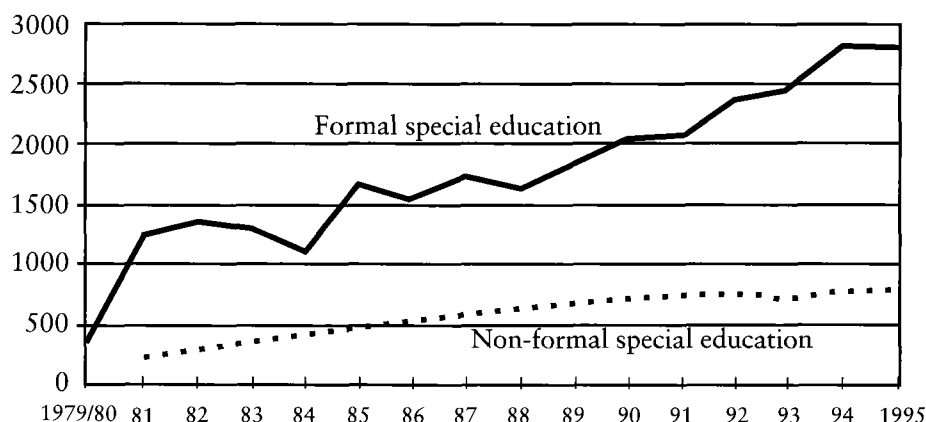


FIGURE 1: Student enrolment in special education.

The number of special schools tripled between 1979 and 1980, contributing to the enormous increase in enrolment during this initial period of time. By 1990, there were 3,224 students receiving special education services. Of this number, 80% were receiving formal special education services and 20% were receiving non-formal services. There were twenty-two special schools, eighteen non-formal education programmes and twenty-nine remedial classrooms which provided special services in 1990. Today, there are twenty-four special schools, thirty-one non-formal programmes and a total of 3,600 students receiving special education services in Nicaragua. Among those benefiting from formal services, an ever-increasing proportion of them are receiving these services in the context of regular schools, either in integrated classes or individually integrated.

Even though special education has expanded rapidly over the past fifteen years, only a small fraction of the population that requires special education services is receiving them. In spite of this extensive growth, special education has not kept pace with the growth in regular education. Currently, special education constitutes less than one-half of one per cent of the regular primary school enrolment. Unfortunately, even regular education has met difficulties in keeping pace with the growing educational demand caused by population growth. Therefore, the out-of-school population has remained quite substantial.

Formal special education

Formal special education services are for children and youth from seven to eighteen years of age who have sensory, physical or intellectual disabilities. These formal services include both the segregated services provided in the special schools and the integrated provision in the regular schools. Currently, the integrated provision includes both special classes (units) in the regular schools and children who are individually integrated. As will be pointed out later, there are a large number of children with disabilities in regular schools who are intentionally not integrated and who are not receiving special support services.

In the special schools, there are various class groupings made on the basis of the needs of the students and the nature of their disabilities. In 1990, these classes included the following: mental retardation, hearing impairment, visual impairment, vocational training, practical training and corrective classes. Unlike a number of other developing countries, special schools in Nicaragua are not purposely organized around one particular disability group. This is probably due to the fact that most of the special schools in Nicaragua were established by the State rather than by missionaries or NGOs, as is typical in many other developing countries. Many of the smaller schools, however, only provide instruction for one or two of the disability groups.

In 1990, all of the special schools provided instruction for students with mental retardation—a group which comprised nearly 60% of the total enrolment in the special schools, as compared to students with hearing impairments (17%) and students with visual impairments (just over 1%). The corrective classes accounted for 15% of the enrolment in the special schools, while students receiving vocational courses or practical training (for the severely disabled) accounted for just under 10% of special school enrolment. It is the intention of special education officials that the special schools will eventually only be used for children with severe disabilities or children who are in need of extensive technical support.

The following descriptive indicators provide a little insight into the relative size and functioning of the special schools. Approximately 44% of the students in the special schools are females, while around 50.5% of regular primary school students are females. The drop-out rate among students enrolled in special schools is just under 10% (Miron, 1994). Currently, there are approximately twelve students per teacher in the special schools, although this number varies extensively depending upon the nature of the classes. The special schools have an average of just over 100 students enrolled in each school. However, the special school in Managua is extremely large, with 489 students currently enrolled. In 1990, school enrolments ranged from 17 to 125 students per school with the exception of the special education school in Managua. Special education services are not evenly distributed across the country; these services are almost exclusively urban and they are largely concentrated in the Pacific regions of the country.

A number of efforts have been made over the last twelve years to provide special services in the regular schools. During the 1980s, the Divisions of Special

Education and Primary Education in the Ministry of Education co-operated in organizing corrective classes (*aulas correctivas*) for children with learning difficulties. Most of the corrective classes were situated in regular schools. Nearly one-third of them, however, were arranged in special schools. These classes used the curricula and the teaching methods of the regular school, although they progressed at a slower pace. There were seven corrective classes in 1983 and by 1986 the number of classes had increased to twenty-six. After an evaluation in 1987, it was found that a number of problems had arisen with this form of provision including a lack of diagnoses before placement, unnecessary segregation, inappropriate teaching methods and lack of properly trained teachers (MED, 1990a). In 1993, the responsibility for the corrective classes was shifted over to the Division of Primary Education and they have since been discontinued.

The Division of Special Education is now focusing its scarce resources on children with more pronounced special needs due to disabling conditions. Nevertheless, it has not abandoned the desire to provide integrated services in the regular schools. In recent years, a number of integrated classes (*aulas integrados*) for children with disabilities have been established in the regular schools. These classes are taught by special teachers and follow a special curriculum. At the present time, there are five such integrated classes in the country with sixty-eight students enrolled.

Currently, there are 269 students with disabilities who are 'intentionally' individually integrated into regular classrooms. At the pre-school level, this is sometimes facilitated by the promoters from the non-formal education programme. At the primary school level, itinerant teachers have been used in recent years to provide support and guidance for these students and their teachers. The itinerant teachers are based in the central or regional offices of the Ministry of Education or in special schools.

The proportion of children receiving integrated special education services is expected to increase in the coming years. New plans are also being considered which would involve the creation of remedial classes or resource rooms (*aulas recusors*) for students who need special instruction or support only during part of the day.

While centrally planned efforts to integrate children with disabilities in the regular schools are gradually increasing, there have been numerous grassroots efforts to intentionally integrate children with disabilities in the regular schools. Many of these were documented in Miron (1994). These grassroots efforts vary extensively in scope and design. What they do share, however, is that they tend to be extremely effective since they are planned according to the local conditions and resources, and because they typically involve the parents. Nonetheless, the overwhelming proportion of children with disabilities who are taking part in regular school instruction are there with no support and usually without the school directors or local education officials being aware of their presence.

Non-formal pre-school education

Children up to six years of age who are experiencing alterations in their development may receive non-formal special education assistance. Children with severe disabilities who are over the age of six may also receive these non-formal services. The idea behind the programme is to detect—at an early stage—children with disabilities or ‘high risk’ children in the community and serve them by training their parents, who in turn provide early stimulation and instruction for their children. The training is conducted by promoters who visit the homes. There are around twenty children served by each promoter. The promoters are largely based in the special schools, although they also work in the community. The local co-ordinator, who is usually a teacher working in special education, supervises the work of two to four promoters at the community level. The administrative co-ordinator of the local programme evaluates the children, trains the promoters, organizes meetings with parents and serves as a liaison with the other public services and NGOs. This educational programme encourages (and is dependent upon) support from the community.

The non-formal programme was started in 1981 by UNICEF with funding from the Swedish government. It addresses the areas of prevention, early detection and rehabilitation of children with the intervention being based upon the family. Initially, the programme provided for 200 children. While the programme has not developed as rapidly as was hoped, nearly 800 children were enrolled at the close of the 1990 school year and 776 children were benefiting from these services in 1994 (MED, 1994). Some of the initial objectives for the programme are listed below (UNICEF, 1982, p. 2).

1. Development of experience in the field of prevention, early detection and rehabilitation of children with special needs, which will be incorporated into the special education system and the Mother/Child programme.
2. Extension of coverage through non-institutional services oriented to the child, his/her family and the community.
3. Design of inter-sectoral co-ordination mechanisms.
4. Organization of Early Child Stimulation Centres and special schools as support mechanisms for the activities in the communities.
5. Generation of mechanisms of popular participation.

One additional objective of the project was the elaboration of a national plan for both urban and rural areas. It was necessary to have inter-ministerial co-operation based on a careful analysis of the responsibilities to be established for each sector. While the basic conception of the project was considered correct, the implementation of the programme met with various limitations and problems, including strained relations between the three Ministries that were involved (the Ministries of Education, Health and Social Welfare). With respect to the personnel, the promoters had a high turnover rate due to the low salary they received. Also, insufficient transportation reduced the frequency of the local visits.

Nevertheless, the project has produced positive results. It has established norms and procedures for the supervision of programmes concerning detection, early stimulation and prevention of childhood disabilities. It has provided training pertinent to physical therapists, health care personnel and teachers of special education. The project has also developed ways in which to utilize local resources and materials. Perhaps one of the most important tasks this programme has accomplished was to play the role of initiator in the region. The experience gained through this programme added to the knowledge available and provided invaluable direction for the elaboration of similar projects in other countries. The impact of this community-based approach can be seen in many other smaller projects functioning throughout the country, for example, in health care.

The future of this programme in Nicaragua remains uncertain. After the completion of new curriculum guides in 1993, UNICEF concluded its involvement and discontinued its financing of this programme. While it remains a priority of the Ministry of Education, their limited resources have restricted any plans to enlarge the programme beyond its current size.

Special education teachers

Special education teachers in Nicaragua are largely primary school teachers who have received some in-service training. This training has been provided by both government agencies and NGOs. Since special education was a new division of the Nicaraguan system of education in 1979, it took some time before any effort was made to provide pre-service teacher training for special teachers. In 1989, a training programme for special teachers was initiated in a co-operative training scheme between the University of Costa Rica, the National Autonomous University of Nicaragua-Managua and the MED. Unfortunately, this endeavour was short-lived. Nicaragua still lacks its own pre-service teacher training for special educators. Nonetheless, a number of the special education teachers have received formal training abroad. During the 1980s, such training occurred predominately in Cuba, the Nordic Countries and in other parts of Europe.

Nicaragua has a large number of qualified and competent persons trained in the field of special education. However, economic and (to some extent) political factors have affected the possibility of employing and retaining these persons. Low salaries have made it very difficult for many teachers to continue, since they cannot support a family on the income they receive as teachers. There was also a large turnover in personnel, particularly at the central level, after the change of governments in 1990. From the survey results from 1990, it was found that 10% of the special education teachers were in their first year of teaching and an additional 20% reported that they were in their first year of teaching in the particular school where they were surveyed. The training of specialists, particularly in the areas of visual and hearing impairments, remains an important area for attention.

Based upon survey results in 1990, a general picture of the background characteristics of special educators was compiled (Miron, 1994). Ninety-seven per cent

of the teachers in special education were females as compared to 88% in the regular schools. The special education teachers had an average of 8.1 years of teaching experience as compared to 8.8 among regular school teachers. On the average, the special education teachers had worked for 3.7 years in their current place of employment. Among the special education teachers, 28% had only completed primary school, 43% had completed secondary school, 20% had a technical degree, 4% had a bachelor's degree and 5% had a master's degree. The special schools had more teachers with both low levels and high levels of academic training than did the regular schools.

The special teachers, as a group, had also received more teacher training than their regular education counterparts: 30% had only attended some training workshops, 44% received training in a normal school, 18% had studied education at the university level, and nearly 8% had completed a university degree in the field of education. Around 80% of the special education teachers had reported that they had received some training in special education (this was largely in-service training which could include as little as a two-week training workshop) as compared to 8% of the regular education teachers. Likewise, the special education directors had also attained higher academic and teacher training levels than did their regular education counterparts, and 63% of them indicated that they had received some form of special education training. Surprisingly, there were very few special educators who had a disability. The directors reported that only 0.9% of the staff in the special schools had a disability as compared to 1.3% of the staff in the regular schools.

Until recently, the inclusion of special education courses in the training of regular teachers has also been overlooked. Since 1995, however, an introductory course in special education has been successfully introduced into the training programme for regular teachers. Together with in-service training, this may prove to be an easy and cost-efficient manner in which to address the need for special attention for those children with disabilities who are already attending the regular schools, as well as those who will be moved over from the special schools.

Policy in special education

Education is compulsory for children aged seven to twelve in Nicaragua. However, due to a scarcity of economic and human resources, this has not been accomplished. Children with severe disabilities are often excluded simply due to lack of services. Children and youth with disabilities can attend special education until the age of eighteen, even though the study plan lasts for only six years and is equivalent to a primary school education.

During the latter half of the 1980s, a number of new policy directions evolved within special education in Nicaragua. To a large extent, these changes resulted from an overall evaluation and assessment of the formal and non-formal special education services. The new policy for special education was drafted in 1989 and approved by mid-1990. This policy states that special education services are to be

integrated and should aim to prepare individuals for life in mainstream society. The policy and plans were spelled out in two documents prepared by the Ministry of Education, namely *The proposal of integration in the framework of special education in Nicaragua* (MED, 1990b) and *The proposal of service changes* (MED, 1990c).

The new policy for special education represented a break with the past and reflected the importance of developing a model and framework that were relevant to the actual conditions in Nicaragua. The new framework incorporates many of the concepts of popular education and is more dependent upon the participation of families and communities. The process of revising the concepts and transforming the services was deemed by the officials in charge to be a move from a 'segregationist approach' to an 'integrationist approach'.

The new framework for the organization of special education comprises three phases. The first phase intends to integrate children with disabilities and their families into society. Services that are provided include prevention and early detection, treatment and stimulation, corresponding to the existing non-formal special education services. The second phase focuses on integrating into the formal education system those children with disabilities who are considered to have the capacity to benefit from it. Thus, a child might be placed in a regular classroom with support services, a special class within the regular school or in a special school in accordance with his or her needs and the nature of the disability. The third phase involves the transition into adulthood and working life, the aim being to assist persons with disabilities in becoming active members in the social and working environment. While the new policy adheres to the principle of normalization and the notion of the 'least restrictive environment', it also recognizes that not all children with disabilities can be fully integrated into the regular schools.

The implementation of this new policy will require a number of changes in the administration of regular and special education at the district, regional and central levels, as well as a redefinition of the present performance structure according to the new necessities. Furthermore, in order for the new framework of services to work, a number of improvements and conditions will have to be met. These include, for example, the training of personnel, a change of teaching methods and teachers' attitudes, the provision of resource materials, the further transformation of the curriculum, the pursuit of further research, the creation of a new planning models and effective inter-sectoral co-ordination. Some of these pre-conditions have been met or are currently being addressed, although much is left to be done before this new framework can be put in place.

At the present time, an extensive evaluation is being done of all of the special education services in the country. After the conclusion of this evaluation, the officials in the Division of Special Education will revise the existing special education policy and plans according to the perceived needs of children and the circumstances in which these services are provided. While one can expect some changes to appear in the policy, there is a strong commitment to continued promotion of inclusive education.

Attitudes towards integration

Since integration is the principle goal of the special education policy, it is of particular interest to examine more closely one of the largest barriers to integration—namely, the negative attitudes of educators and peers. In this section, a number of the results from the 1990 survey (Miron, 1994) concerning attitudes to integration and the factors related to these attitudes are summarized.

The informants in this study (teachers, school directors and grade six students) prioritized the most integrated school provision for children with learning difficulties, followed by children with physical disabilities, speech impairments, emotional disturbances, hearing impairments and visual impairments. Students with mental retardation were ranked last in terms of integrated school provision. Some of the other main findings concerning attitudes to integration are listed below.

1. Regular teachers suggested integrated school provision for children with learning difficulties, physical disabilities, emotional disturbances and speech impairments. They felt, however, that children with hearing impairments, visual impairments and mental retardation should attend special schools.
2. The background variable which seemed to have the strongest relationship with a positive attitude towards integration was special training. Those teachers and directors who had received some special education training were significantly more positive about integration than those who had not received such training.
3. The educators who had received more teacher training and academic training had a significantly more positive impression of integration than did those teachers with less such training.
4. The teachers and directors in special schools had significantly more positive attitudes about integration than the regular school educators, although teachers and directors in the few integrated regular schools were found to be the most positive towards integration.
5. The directors were significantly more positive about integration than the teachers. The grade 6 students were typically more positive towards integration than the teachers but less positive than the directors.
6. Female teachers and directors were noticeably more positive regarding integration than their male counterparts (this difference was not significant).
7. Teachers and directors in public schools had slightly more positive attitudes toward integration than private school educators (this difference was not significant).
8. Teachers' years of experience, the grade level and size of their class, and the proportion of students with disabilities in their class were all considered, but no noticeable or significant relationship was found with attitudes towards integration.

Programmes and interventions for persons with disabilities have two advantages in Nicaragua: the general attitudes regarding persons with disabilities and the accept-

ance of individuals with disabilities appear to be more positive than in other countries in the region, and persons with disabilities and advocacy groups are extremely well organized at both the national and local levels. Additionally, efforts made by those disabled in the war have affected policy and the general treatment of persons with disabilities. There have been many efforts made by the government and NGOs to increase the level of awareness and the understanding of the situation of persons with disabilities among the general population. This is also one of the areas which has received considerable attention from the current officials in special education.

The situation of children in Nicaragua

The circumstances and conditions in which the children of Nicaragua live are inextricably linked to the national and societal characteristics of the country. Nicaragua is a strategically located country, and since the coming of the Europeans more than 500 years ago, the country has been torn by war and foreign intervention. Nicaragua remains among the very poorest of the Latin American countries.

Even though a number of improvements in education and health care were made after 1979, these achievements were eroded away during the 1980s by the war and the deepening economic crisis. The economy has not improved during the 1990s, although the new government has succeeded in halting inflation by, among other things, the introduction of further cuts in social services.

Children and youth under the age of eighteen make up half of the population in Nicaragua. The transition from childhood to adulthood comes early and the responsibilities placed upon children are great. Yopo (1989) estimated that 21% of the Nicaraguan children and youth who are fourteen years of age or younger were living under especially difficult circumstances. His figures include 220,793 children affected by the war (killed, injured, orphaned, kidnapped or displaced), 16,000 children who were living in the streets, and 120,000 children who were living in extreme poverty. A report made a few years later (UNICEF, 1991) suggested even higher figures. The worsening economy has led to cuts in social and health care services for the general population at the same time as their general health and nutritional standards are decreasing. A Ministry of Education report from 1993 (MED, 1993) notes that 25% of the population is estimated to suffer from malnutrition, and the physical and mental development of over 15% of Nicaraguan children is believed to be impaired due to malnutrition.

The number of individuals with disabilities in the country is quite large due to war, natural catastrophes, and poor nutritional and health standards. A large number of children were affected both directly and indirectly by the war, many of whom still bear the emotional scars caused by the war. As one can imagine, the mental health needs of children affected by war or its consequences are great (see Metraux, 1989). While the actual number and types of children with disabilities in Nicaragua are not known, estimates made in 1989 suggest that approximately 170,000 children and youth are suffering from a disabling condition and should

require some type of specialized or supportive instruction (MED, 1990c) (approximately 95,000 of these children are of primary school age). The figures vary extensively within the country due to such factors as the war, the differing standards of nutrition and the accessibility of health care.

The prevalence of children with disabilities in regular primary schools

For purposes of future planning of special education services, it is important to consider the children with disabilities who are not receiving special education services. While it is difficult to calculate the number of children with disabilities who are not attending any school, it was possible in the 1990 national survey (Miron, 1994) to estimate the number of children with disabilities who were enrolled in regular schools. Some of the findings from this study are reported below.

Over 540 regular primary school teachers reported data on the 19,900 students in their classes at the end of the school year. These teachers were asked to specify the number of students in their classes who they thought were experiencing a disabling condition. There were seven pre-determined categories: mental retardation, hearing impairments, physical disabilities, visual impairments, speech impairments, emotional disturbances and learning disabilities/difficulties. The teachers received some preparation in order to help them identify these students and to distinguish between the categories of disabling conditions.

The total proportion of children with disabilities in the regular primary schools was found to be 7.7%. Of this group, 39.8% were believed to have a learning disability or were experiencing difficulty in learning. Twenty per cent had an emotional disturbance, 14.2% were experiencing difficulties in language, 12.3% had a visual impairment, 5.2% had a hearing impairment, 5.2% had a physical disability and 3% had mental retardation.

There were a number of differences in regard to the location and status of the schools. In rural schools, 8.2% of the students had disabilities compared to 7.5% in urban schools. The largest differences existed between public and private schools. The private schools had a significantly lower proportion of students with disabilities than the public schools (5.9% and 8.5%, respectively).

Large differences existed between the three zones specified in the research design. The Atlantic zone had significantly more students with language difficulties which was largely due to the fact that many of the students were not being instructed in their mother tongue. The incidence of ear infections—due to swimming in dirty water—and malaria were believed to be responsible for the significantly larger proportion of students in the Atlantic zone who had hearing impairments. The Atlantic zone also had a larger proportion of students with mental retardation. The mountain zone had significantly more children with emotional disturbances and physical disabilities. This can be attributed to the Contra War which directly affected the mountain zone more than the rest of the country.

The proportion of children with disabilities significantly decreased over the six grades of primary schooling from 10.1% in grade 1 to 5.1% in grade 6. The findings indicate that students with disabilities do not advance to the upper levels in the primary school at the same rate as their non-disabled peers due to dropout and grade repetition. This was particularly true in the case of students with intellectual disabilities, since the strongest correlation existed for students with mental retardation or learning difficulties. The proportion of students with hearing impairments, visual impairments and physical disabilities did not noticeably decrease over the six grades, probably due to the fact that many students acquire these impairments when they are of school age.

The goal of education for all

The goal of education for all, which Nicaragua has expressed a desire to reach by the year 2000, is going to be difficult to reach, especially since the number of children not attaining four years of schooling is so large (see Figure 2). While the net enrolment rate in grade 1 is disproportionately large, dropout and grade repetition take their toll, and very few of the children who enter school complete even a four-year basic education. The actual age cohorts were approximately 150,000 in 1990.

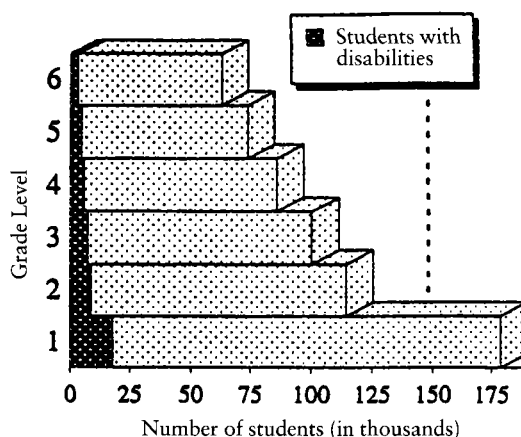


FIGURE 2. Regular school enrolments in 1990.

The number of children with disabilities who were of primary school age in 1990 was estimated to be around 95,000. Of these, around 48,000 were enrolled in primary schools, and only 2,505 were receiving formal special education services (Miron, 1994). These figures point out that only 2.5% of the children with disabilities are receiving special education services. Almost half of the estimated number of primary school age children with disabilities have at least initially enrolled in regular schools.

Nicaragua, like many other developing countries, is plagued by problems of drop out and grade repetition. The dropout rate was between 15 and 22% at the end of the 1980s (Arrien and Lazo, 1989) and around 18% in 1992 (MED, 1993). A Ministry of Education report estimated that only half of the students are promoted each year from grade 1 to grade 2, and only one quarter of all of the students who enter primary school complete all six grades (MED, 1993).

The high numbers of dropouts and 'repeaters' in Nicaragua suggest that the needs of students are not being met and that qualitative improvements will need to be made in order to increase the effectiveness of the education system. While one can assume that the dropout rate is linked to a number of pedagogical issues, one cannot help but believe that the principal cause for dropping out is the overall dismal state of the economy which directly and indirectly affects the situation of youth at home and at school. As seen from the 1990 survey results (Miron, 1994), there was extensive consensus among the informants that the single most important factor contributing to dropout was undernourishment. Interventions to decrease the dropout rate will need to consider the economic standing of the families and the relevance of schooling for these families. Unfortunately, the introduction of school fees in recent years (even for public schools) is likely to exacerbate the problem of dropout and undermine the rationale for families to enrol their children with special needs.

Conclusion

There are a number of changes that will need to be made and areas that should be addressed concerning the changing role of special schools and special teachers in Nicaragua's special education policy. Special education services still face serious coverage problems since only a very small proportion of children with disabilities, in limited geographical areas, are receiving these services. More efforts need to be taken in order to train special education teachers and to retain them once they have been employed. This will require improving their salaries and working conditions. The special schools have to be better utilized as resource centres for providing support and training, and for developing learning materials for regular school teachers. The special schools have served as a base for non-formal promoters who work in homes in the surrounding community; more recently, they are increasingly used as a base for itinerant teachers who visit and work in the regular schools in the vicinity. This evolving role of the special schools is clearly spelled out in the intentions and plans of the special education officials in the Ministry of Education.

The findings from the national study (Miron, 1994) raise a number of questions concerning the regular schools. Most prominent is the fact that widespread 'non-designed' integration already exists. Children with disabilities are highly represented in the regular schools, although they seldom progress to the later years of primary school, due to grade repetition and dropout. Since most of the children with special needs are in regular schools and not in special schools, resources for special education should better reflect this distribution of students between regular

and special schools. Likewise, the distribution of resources between regular and special education should be reconsidered in light of the fact that so many children with special needs are enrolled in the schools. The problem of providing education for all children with disabilities and/or special learning needs is enormous, and the regular schools provide the only feasible solution to meeting the needs of this large group.

One of the most tangible barriers to successfully integrating children with disabilities in regular schools is teachers' attitudes. The most effective way to change these attitudes is with pre-service and in-service training, and with support and guidance offered to regular school teachers. The introduction of the new pre-service course in special needs education for regular teachers is an important step toward altering teachers' attitudes toward children with disabilities. Nonetheless, changes will be needed in terms of financial and material resources so that the regular teachers can work more effectively with children who have special needs. Special teachers who could provide advice and guidance as support personnel will be needed. Likewise, there is a need for classroom assistants which could be met through innovative schemes utilizing parents, volunteers and organizations of the disabled.

Nevertheless, the immense size and impact of economic factors pose the most critical barriers to expanding special needs education in the country. Likewise, the qualitative improvements in schooling that are needed to reduce dropout and grade repetition so that Nicaragua can attain education for all, are dependent upon the state of the economy and the amount of resources devoted to education.

The policy and goals established by the special education officials in Nicaragua are clear and ambitious. The new framework being put in place suggests that further expansion of special education services will work toward including more and more children with special needs in the regular schools. The extensive planning and work carried out over the last six years in order to restructure special education remains a force with momentum to carry it forward. Just how far this momentum will carry the process of inclusive schooling is difficult to determine. Nevertheless, one can be certain that the future developments in this field will be linked to—and dependent upon—the political changes and economic well-being of the country.

Note

1. The author would like to recognize the advice and support he received from Blanca Rivera (National Director of Special Education) and Desirée Román (Advisor on Special Education). Both are employed by the Nicaraguan Ministry of Education.

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A CHANGE IN OUTLOOK: FROM WORK TO SCHOOL

Luis Reguera

The education given in schools bears little relation to the real needs of the labour market. This has become increasingly evident in the studies carried out. Recognizing this, the final declaration of the World Conference on Special Needs Education: Access and Quality, held at Salamanca in June 1994, urged governments to make greater efforts to improve vocational aspects and to include 'the transition from school to an active working life' as a priority in the framework for action.

This concept will be kept in mind in the following pages. We intend to take the opposite path to the one usually followed by students: from the goal to the point of departure. We shall start by defining the area called the world of work, which will then make it easier to choose the most rapid route from school to this world. For a student with special educational needs to make the right transition from school to work, it is essential that the education system be organized in accordance with the requirements of the world of work and adult life. Too often, schools are organized as an end in themselves, disregarding their vital role in life. Issues concerning the world of work frequently only receive marginal attention in the programmes of teaching centres and are only a fleeting presence in educational fora.

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Even though work is an important element in a person's life—as a determinative factor of self-esteem, recognition by others, integration in the community, and as the foundation for economic independence, etc.—it is nothing more than one of the features characterizing the transition to adulthood. This phase in a person's life, whose precise definition and limits may vary in different cultures and countries, has a number of common traits, such as productive activity, personal autonomy and independence, the role played within the family and the form of participation and social interaction (OECD/CERI, 1990).

Preparing for adult life does not only mean preparation for work, but also preparing for the other aspects mentioned above. A person's quality of life and integral development can only be fulfilled if there is harmonious growth of the whole.

Economic change and the labour market

According to recent reports by ILO, when identifying trends in employment today, two of the most significant phenomena on the current economic scene stand out by their importance, namely, the globalization and the liberalization of the economy. Globalization is mainly characterized by the free flow of capital so as to lower production costs or employ a cheap and productive labour force. The lifting of barriers to trade, the radical changes in production processes and the capacity of certain countries in Asia and Latin America to attract technology from more developed countries explain their level of development. The effects of economic liberalization are even more far-reaching and have overtaken the member countries of the Organization for Economic Co-operation and Development, affecting the structural adjustment programmes of developing countries, as well as the new economic structures being created in countries with economies in transition.

In addition, the production and employment structure has changed radically. Regarding the former, according to the reports mentioned in the preceding paragraph, the agricultural sector is much less important today, only accounting for 4% of global production, whereas industry and the services sector are relatively more important with around 65% of total production in the industrialized countries. The employment structure has changed as a result of these developments (see Table 1).

This situation has been accompanied by new economic policies, important technological innovation, radical changes in methods of production, marketing, management and organization of work, with the ongoing objective of deregulating the labour market.

These structural changes have not, however, prevented increased unemployment in recent years in the majority of countries, whatever their level of development or stage of transition. This deterioration has led to, and reinforced, certain attendant phenomena: the risk of further cutbacks in staff; greater difficulties for young people in finding a job; increase in self-employed persons in urban areas; 'feminization' of the work force; an unstable situation for wage-earners, with an

TABLE 1: Employment structure in the world (1965 and 1989-91)

	Agriculture		Industry		Services	
	1965	1989-91	1965	1989-91	1965	1989-91
World	57	48	19	17	24	35
Industrialized countries	22	7	37	26	41	67
Developing countries	72	61	11	14	17	25
East and South East Asia ¹	73	50	9	18	18	32
Sub-Saharan Africa	79	67	8	9	13	24

1. 1960 figures rather than 1965 figures: industry only refers to manufacturing.
Source: ILO labour statistics (Geneva, 1994).

increase in part-time employment for short periods and temporary jobs; growth of the informal sector of the economy in urban areas. In Africa, for example, this sector has risen from 10% in the early 1960s to more than two-thirds in some instances.

In order to deal with this situation, enterprises have been obliged to derive the maximum benefit from their competitive capacity and to adjust to markets. In many cases, this has led to restructuring and mergers, the introduction of important new technological innovations, automation of production processes, more flexible decision-making, in other words, to the quest to optimize productivity.

As a result, much more flexible and fluid ways of utilizing human resources have become necessary. Enterprises are opting for strategies that make workers much more adaptable and mobile and require greater creative capacity so that they can adjust to technical progress and pressure from competitors.

The response of education and training

This is the background against which workers will have to function in the future. Echoing these needs, the ILO report on 'Adjustment and human resources development', submitted to the 1992 International Labour Conference (ILO, 1992b), concluded that professional and functional adaptability was becoming one of the fundamental targets of training. The capacity for adaptation on the part of workers implies that they must have a satisfactory level of basic education. It also means that rigid vocational training should be eschewed in favour of greater emphasis on the acquisition of multiple skills and qualifications.

Two decades ago, the emphasis was on special skills and qualifications needed to carry out special tasks, whereas now educational and training schemes aim to provide a broad range of skills and qualifications that can be 're-utilized', for example, the ability to resolve problems, react rapidly to change and interact with others. The circumstances indicated above make it necessary to install educational and vocational schemes based on the concept of lifelong training.

The response to the changes that have occurred in the economy has led to radical developments in the 'training/employment' relationship. The new strategy

is based on the priority given to training based on professional experience, which implies a new division of responsibilities between schools and enterprises. The distinction between general education and basic technical training provided by schools, on the one hand, and subsequent practical training by enterprises on the other is disappearing in the most developed countries, such as Germany and Japan. A combination of both is generally agreed to be an effective method of facilitating the transition from school to the world of work. The 'training/employment' relationship is ceasing to be 'consecutive' and becoming 'simultaneous'. The 'knowledge' imparted by schools has to be complemented by the 'know-how' and 'knowing how to be' provided by enterprises in today's changing and competitive conditions.

Lastly, but by no means least, the response of education and training must meet the needs of the individual. Later we shall see the importance of this factor in more detail when we focus on persons with disabilities. For the moment, it is enough to bear in mind that these needs are not met by mastering the knowledge and specific skills required for a job. On the contrary, other aspects of personality, such as the ability to relate to others, to interact, to work as a team, to 'know how to be', are increasingly relevant to success or failure at work.

The labour market and persons with disabilities

We have looked briefly at some of the essential features of today's economic scene, the resulting changes in behavioural trends in the labour market, and the education and training needed to meet these challenges. It follows logically that the situation outlined at the global level can be found at the national, regional and local levels, subject to the necessary modifications and qualifications. Until now, we have deliberately remained at a very general level. This is the situation facing all workers, including those with disabilities.

In order to complete the picture, it is necessary to consider the series of special measures established to guarantee, encourage and promote the employment of persons with disabilities, whether in the traditional labour sector or through special employment formulas.

This aspect, in which the principle of equality of opportunity plays an important role, is of vital importance. It would be totally wrong to believe that today appropriate education and training for persons with disabilities suffice. Experience has shown that these are not enough. Action has to be taken simultaneously in labour markets so that these persons can be given the same opportunities offered to other workers, under equal conditions. We should not forget that, in reality, a person becomes disabled when the opportunities enjoyed by people as a whole are denied to him or her because of disability.

Special measures can vary a great deal. Some countries have implemented positive action measures, such as adapting jobs and the criteria for access to enterprises, wage subsidies, tax exemptions or a range of economic incentives to encourage the employment of persons with disabilities. Others have decided to

reserve a fixed number of jobs (quota system) for such persons. Some prefer formulas such as supported employment, special work units, co-operatives, self-employment, production workshops or protected workshops. In some cases, entrepreneurs and trade unions include clauses in their collective agreements guaranteeing that there will be an appropriate number of workers with disabilities in the enterprise. A number of countries have adopted anti-discrimination legislation; many others combine several of these methods.

In general, it can be stated that persons with disabilities suffer very serious disadvantages compared with the rest of the labour force. Many studies carried out in different countries have provided a sombre picture of the possibilities open to persons with disabilities once they have completed their vocational training. For example, data from the Australian Statistical Office in 1990 (Ling, Morris, Riches, 1993) show that the percentage share of persons with disabilities in the labour force was 46% (i.e. the percentage in employment) compared with 72% for all persons aged 15 to 64. In addition, there were high levels of unemployment and part-time work, intermittent or sporadic, with no job security and very low salaries (Bellamy, 1985; Roessler, Brodin & Johnson, 1990). A longitudinal study in the United States (Wagner, 1991) showed that only 29% of students with disabilities who had finished their schooling were employed full time and 17% part time, rates that are markedly lower than for other students. In the United States, 67% of persons with disabilities in the 16 to 65 age group did not have a job. These data are very similar to those in a survey carried out in Spain in 1986 for the National Statistical Institute, which found that 67.5% of persons with disabilities aged 16 to 65 did not work. Lastly, according to a report by the European Union, the unemployment rate of persons with disabilities exceeded the overall unemployment rate by between one-and-a-half to two times.

Although the figures may have changed in recent years, the general trend of employment worldwide seems to indicate that the situation has not improved at the global level.

On the basis of the principles

This is the background against which realistic plans for the educational itinerary of a young person with a disability have to be made.

Before embarking upon this itinerary, the principles guiding our progress should be made clear. They include three principles that are particularly relevant for the formulation of policies, rules, plans, strategies and methods to facilitate the passage of young people with disabilities from school to active life.

The first is *equal opportunity*. Derived from the various international instruments and declarations on the rights of all persons, this principle was the inspiration for the 'Standard rules on the equalization of opportunities for persons with disabilities', adopted by the United Nations General Assembly on 20 December 1993. According to these rules, 'equalization of opportunities means the process through which the various systems of society and the environment, such as ser-

vices, activities, information and documentation, are made available to all, particularly to persons with disabilities'. This international instrument stresses that 'the needs of each and every individual are of equal importance' and 'all resources must be employed in such a way as to ensure that every individual has equal opportunity for participation'.

Much closer to our subject is the principle enshrined in ILO Convention 159, adopted in 1983, whose objective is to ensure the active participation of persons with disabilities in the labour market. The Convention lays emphasis on equal opportunities for workers with disabilities and workers in general (Momm, 1994).

In order to ensure that this principle is applied, it will be necessary to 'work on the labour market' and on society as a whole. Otherwise, even if they are well trained, young people with disabilities might have to wait many years before getting a job in today's difficult circumstances. In addition, equality of opportunity means that young persons with disabilities should have access to the same educational and training possibilities as other young people.

Another important principle is *normalization*. According to Nirje's formula (1985), the principle of normalization means giving persons with disabilities models and living conditions that are as close as possible or 'are the same' as the circumstances and forms that are considered normal in society.

In conformity with this principle, the 'Framework for action on special needs education' of the World Conference in Salamanca mentioned above states that 'schools should accommodate all children, regardless of their physical, intellectual, social, emotional, linguistic or other conditions'. According to ILO's Convention 159 already mentioned, integration in the normal labour market is the objective to be pursued, using existing services for workers in general and adapting them as necessary, providing that this is possible and appropriate.

The third principle that must be mentioned is *participation* by persons with disabilities. We believe that this is fundamental from two points of view: participation as active elements in society and development, on the one hand; and participation in the consultation and decision-making process affecting them, on the other. The Global Action Programme for the Handicapped reaffirms this principle at the international level, and it is included in many other international instruments such as ILO Convention 159.

Interinstitutional approach

Pursuing our itinerary—from work to school—we shall outline below some considerations regarding the practical consequences of this change in outlook when preparing young persons with disabilities for active life and adulthood.

First of all, from all that has been said it is easy to infer that preparation for active life cannot be the exclusive responsibility of educational and training institutions. An interinstitutional approach is required in order to understand the behaviour, trends and needs of the labour market; to promote measures to guarantee access to the market under equal conditions for workers with disabilities; to

plan training that will be in harmony with these factors and, lastly, to participate in its practical implementation. The relationship between educational and training institutions and labour administration services, enterprises, trade unions and other social forces must be assured throughout the whole training process (ILO, 1992a). This was also reaffirmed by the recent World Summit on Social Development, held in March 1995 in Copenhagen. In this connection, it must be borne in mind, as mentioned above, that work experience is an integral part of training nowadays, which means that enterprises participate directly in training. In the case of persons with disabilities, the increasing importance of formulas such as 'supported employment' (König & Schalock, 1991), where training is given on the job, makes the need for this relationship even more obvious.

At the individual level, this approach has to be materialized in the form of assessment, guidance, training, placement and follow-up for all young persons with disabilities requiring them. The 'perspective of the educator' as the only way has to be abandoned if we hope to adapt the interests and needs of the young person with a disability to the demands of the labour market. Other actors must also play their role, particularly if, as mentioned at the outset, an active working life and adulthood are indissociably linked.

The interinstitutional approach implies policies, methods and procedures to facilitate its practical implementation. A general call for interinstitutional co-ordination, as seen in so many legal texts, is not enough. It will be necessary to define issues such as forms of co-operation among different bodies—public education services, public employment offices, social security and welfare services, etc., enterprises, trade unions and other forces in society; definitions and criteria for admission; shared use of assessment and guidance data; procedures for referring cases among services; the elaboration of a personalized programme for each individual, the body responsible for each phase of the programme and the distribution of costs, etc.

The transition from school to active life: period and process

From a general point of view, preparation for an active life and adulthood are the justification for school programmes as a whole. We are, however, going to focus on the final stage in the itinerary when adult life can already be seen as a goal within reach. This is the transitional stage. It is generally taken to mean the period comprising the last years of schooling, education after school and vocational training; entry into the world of work and into adulthood.

Transition, however, means above all the process followed by each individual during this period. An OECD report in 1986 defined transition as 'the process by which an individual grows from adolescence to adulthood in the social, cultural, economic and legal environment of the family, community and national policies'. At the end of the process, the individual should have acquired the knowledge and

skills to allow him or her to find a job, lead an independent life, participate in family and community life, and in the constructive defence of his or her interests in society (Mendía, 1994).

The individual at the centre

Although it is true that the preparation for and transition to an active life are related to systems and institutions, what really makes the transition a genuine challenge is the nexus between the institutional effort and individual planning (San Diego State University/Interwork Institute, 1994).

Everything revolves around the needs of the individual—according to his or her entry into active life and adulthood—and not around the needs of the programme, as in the traditional approach. An example will illustrate better the practical implications of this difference: in the case of deaf students, we could focus exclusively on making the programme accessible to them, establishing the educator/student relationship through an interpreter using sign language, for example; or we could, on the contrary, focus on helping them to compete as workers and coping as adults, in an environment in which they will usually be surrounded by people who can hear. In the second case, not only must they be given access to the curriculum but also helped to overcome the communication barrier, using the method most suitable in each particular case (Reguera, 1994). In traditional planning, based essentially on the criteria of professionals, defects are evaluated and the person is adapted to the programme. On the other hand, in the new approach ‘focusing on the person’ (Reguera, 1992), planning concentrates on the capacity, interests and special needs of the individual; services are co-ordinated according to individual needs; the family and the beneficiary are involved as participants and services are provided on the basis of an informed choice by the individual. It should be emphasized that an approach focusing on the individual has been dictated by the demands and needs of the labour market and society, on the one hand; and, at the same time, it means that all the bodies and authorities taking part in the process must co-operate to open up all the real possibilities of access to work and participation in society, on the other.

Individual transition plan

Based on this premise, in recent years in various countries an instrument has been formulated which, with slight variations from one country to another, is called an ‘individual transition plan’ (ITP). In one or the other form, this plan comprises a co-ordinated series of activities and services to facilitate the transition of a student with a disability from school to active life and adulthood, based on his or her individual needs, preferences and interests. The ITP is the continuous thread running through the whole transition process. All the services provided to an individual during the process converge in the plan.

In order to be effective, the process must be directed towards achieving clearly defined objectives, not only in relation to labour integration but also to other spheres that determine an individual's quality of life, for example, personal independence, participation in family and community life. It is an essential prerequisite for the viability of the plan that these objectives should be shared by all the elements involved in the programme, starting with the individual and the family. The following are some of the basic elements of this model:

- An initial assessment to determine an individual's abilities and special needs in relation to his or her future responsibilities at work and as an adult, as well as the availability of the community resources required to facilitate the transition process.
- Individual planning of the transition process and its impact on school planning, employment services and community services, with the aim of defining the objectives, targets, strategies, resources, action required and the persons responsible for implementation.
- Carrying out the plans previously drawn up regarding school education, post-school training, vocational training, integration in the labour market and participation in the community.
- Evaluation and systematic follow-up of the whole process and the results achieved, facilitating the incorporation of any changes needed.

Some experiences

In practice, the transition process and preparation for adult life take many different forms. Some examples are described briefly below and serve to illustrate this.

In Australia (Parmenter & Riches, 1990), the experience of individual transition plans has gradually been extended since 1989. Two structures have been set up for this purpose: transition teams based in schools and transition teams based in the community.

The task of transition teams based in schools is to draw up and implement an individual transition plan for each student; meet the needs of each student so that he or she can live and work as independently as possible in the community, enhancing their quality of life; and plan the provision of the transition, educational and support services required to meet these needs. Transition teams based in the community, on the other hand, strive to reinforce co-operation and collaboration among all the services and authorities at the local level. They are composed of teachers and school administrators, representatives of service bodies for adults, either governmental or non-governmental, representatives of community services, municipal councils, parents and business people. The school teams focus on providing each student with the services needed, while community teams reinforce the capacity of the services available during the transition period.

A follow-up study has been done on the first group of students who took part in a transition project and left school in 1989 and 1990. In general, the students who participated in the project obtained much better results than non-participants.

Their self-esteem, professional awareness and motivation at work were much higher. Wages were low, however, and they had little job security. In addition, young people with severe or multiple disabilities obtained much poorer results, mainly due to the lack of programmes or activities available to them within the local community. This initial experience also faced problems related to the distribution of costs among institutions and the paucity of links with general training programmes. The evaluation resulted in a number of recommendations to improve application of the transition model.

In the United States, transition services are covered by two Federal Acts, the Individuals with Disabilities Education Act Amendments of 1990 (PL 101-476) and the Rehabilitation Act of 1973 as Amended by the Rehabilitation Act Amendments of 1992 (PL 102-569).

Both texts contain an identical definition of transition services, meaning a co-ordinated series of activities for students, formulated within the framework of a process directed towards results, which supports the passage from school to post-school activities, including post-secondary education, vocational training, integrated employment (including supported employment), further education, adult education, services for adults, independent life or community participation. This co-ordinated series of activities is to be based on individual needs and takes into account the preferences and interests of each student.

The provision of transition services must be included in a plan at the level of each State, the details of which are set out in the Rehabilitation Act. Moreover, at the individual level, the Education Act establishes the individual education programmes for each student, making it mandatory to include in them the formulation of the transition services needed from 16 years of age onwards. The formulation has to be revised annually and it specifies the interinstitutional obligations and links that have to be established before a student leaves school.

The Rehabilitation Act provides for the formulation of an individual written rehabilitation programme, revised annually, for every person with a disability with the right to the vocational rehabilitation services specified in the act. The resources needed to ensure that each individual has access to transition services in accordance with their individual rehabilitation plan must be specified in the aforementioned State plan, together with measures for co-ordination with educational authorities.

In Denmark, a number of regulatory texts from the late 1970s have led to the creation of a special personage called the *Kurator*, whose responsibilities have evolved and approximate to what might be termed an expert in the transition period (Boyd Kjellen, 1990).

The *Kurator* orients and guides students with learning difficulties who attend special classes, while other *Kurators* also help young people with disabilities attending normal classes. In fact, it is not a special job. The *Kurator* is a teacher qualified to take classes from the first to the tenth grades. He or she is a member of the educational guidance team and has special knowledge regarding relations with the community, vocational placement and co-ordination with other authorities. Guidance during the transition period is given in collaboration with the students,

parents and teachers. The aim of this guidance is to develop an individual plan for each student.

The *Kurator* is employed by the municipal authorities according to the number of pupils. His or her responsibilities start in the eighth grade and continue up to the tenth grade, providing educational and vocational guidance for two hours a week. This support sometimes continues after the pupil has left school. Because of his or her work with the students, parents and a wide range of professionals, the *Kurator* is involved in many different aspects of a student's life: school matters, including the choice of subjects and work experience in the last years at school, grants, post-school education and vocational training; working conditions, labour law, relations with trade unions and enterprises, wages, employment options, etc.; personal questions concerning disabilities, the family and economic environments, leisure and spare time, social security and social services, etc.

In Nigeria, in the first instance, preparation for active life took place in residential vocational rehabilitation institutions. Because of the meagre results achieved, due among other things to the marked discrepancy between the centres and the real needs of the market, in 1988 a programme for Rehabilitation Based in the Community (RBC) was initiated. The programme received support under a technical co-operation project formulated and implemented by ILO, with financing from the United Nations Development Programme.

A Community-Based Vocational Rehabilitation Committee was set up as an important element in the scheme; it comprises community leaders, representatives of disabled persons' associations, representatives of non-governmental organizations particularly active in the area of rehabilitation, and representatives of ministries and official bodies. The committee has four sub-committees dealing with different aspects of the process.

The operational scheme is based on two main components: vocational training in the community; and access to credit facilities in order to carry on viable income-generating activities based on a rolling loan fund.

Vocational training is given in workshops existing in the community, according to an 'apprenticeship' system. The sub-committees, with the help of social workers, carry out the various tasks involved in the process, extending from awareness promotion campaigns, selection of workshops and follow-up of apprentices to the initiation of income-generating activities.

The persons responsible report to the monthly meetings of the Community-Based Vocational Rehabilitation Committee, with the participation of families, educators and apprentices. In order to obtain credit from the bank, the beneficiary must show his or her ability to earn a living over a period of at least three months (usually with the support of family members or clubs).

Issues to be resolved

The process of transition to an active life and adulthood raises a number of issues that require a response because they can have a decisive impact on the ultimate

success or failure of the individual. These concern the process as a whole, including preparation for an active life and integration into the world of work, as well as other aspects related to adulthood. Some of the issues most frequently raised are described below.

One of the most important issues is how to guarantee continuity and coherence among the objectives, curricula, strategies and expectations of the various authorities and persons involved in the passage from school to adulthood. There is a lot of 'idle time' and a lack of appropriate information when a client should be receiving services from another authority. This is also true when one authority supports the development of a person's capacity for work while another grants a pension for the person's inability to work. In this connection, it is relevant to note what was said by Spanish representatives regarding persons with disabilities in the context of a plan to reactivate employment of this group: 'There is disturbing growth of a subsidies culture in which benefits and non-contributory allowances under the social security scheme act as a brake or disincentive to the attitude of a person with a disability in favour of integration into the labour market, without the scheme providing corrective mechanisms in respect of persons who unjustifiably reject suitable employment'.¹

The background to problems of continuity and coherence continues to be the lack of co-ordination among health, education, labour and social services. This can lead, for example, to duplication of resources, tiresome repetition of requests for basic data, unnecessary bureaucracy or, what is worse, flagrant lacunae in following the sequence of targets in the process.

Furthermore, the special situation of young people with disabilities means that they reach the transition period under different circumstances; some of them have been attending normal classes, others special classes or schools, hospitals, homes, etc. Their ages also vary considerably. Consequently, the application of flexible criteria is called for and the regulations in effect, as well as the institutions involved, are not always prepared.

Although great progress has been made in recent years, participation and representation by persons with disabilities themselves is far from being admitted in practice. The 'eternal child' syndrome, prompted by families and institutions, still remains an enormous obstacle to access to the world of work and the assumption of roles inherent in adulthood. Accustomed to a system in which educational objectives and school results are not related to the future requirements of employment and adult life, students tend to see themselves as perpetual recipients of services-eternal dependents.

Another extremely sensitive aspect of the transition process is the role of parents. During this period, the concern of parents for the future of their child can transform itself into anxiety. The information given to parents is often not adequate nor do the relations with the various professionals and their children themselves reach the level of collaboration and equilibrium needed. Nevertheless, the role of parents and their attitude can be a determinative factor for the adult life of their children.

An articulate and coherent transition process, as defined here, implies important changes in the way in which various authorities function. In some countries, such as the United States, these changes have been foreseen and are backed up by legislative measures. This is not the case, however, in many other countries where transition programmes have to be initiated by doing away with traditional systems that operate within a framework of regulations and the organization of services that hinders rather than facilitates co-ordination. The ensuing practical difficulties are obvious.

In addition, changes in the mode of operation logically affect the functions of the various professionals and actors involved in the process. It is not the same, for example, to work with a curriculum established in the traditional way and with a curriculum focusing on the student in accordance with his or her individual transition plan and adapted to special needs; it is another thing to collaborate with professionals in employment offices, social workers, entrepreneurs, etc., rather than to collaborate solely with colleagues in one's own institution. As noted above, new posts are being created in support of the transition process. The question of training staff therefore needs to be tackled properly. If this is not done, natural fear of change, on the one hand, and lack of the competence required, on the other, could greatly slow down the process.

Lastly, but not least, there are problems related to finance. The passage to adult life is a period when, more than at any other stage, the convergence and co-ordination of services is essential. However, these services are in different areas—education, labour and social sectors basically—with their own authorities and budgets. Financing sources are often different: State, regional, local, etc. To adapt this situation in time and form to the special needs of each person implies a co-ordinating capacity that sometimes exceeds the competence of the professionals and authorities in direct contact with the beneficiaries. It has been seen how, in Australia, these problems had a negative impact on the programme. In the case of Nigeria, the existence of a rolling loan fund has been a crucial element in the programme.

Summary

The conditions of access to the labour market are difficult for everyone today, but are even more difficult for persons with disabilities. We should not lose sight of this fact, nor deceive ourselves as to the real situation. In order not to waste efforts nor take a wrong step, it is important to prepare the passage of a young person from school to work on the basis of these conditions. Above all, young people with disabilities must be well trained and competitive at the productive level. This is particularly true when speaking of integration in the normal labour market. This will be their best reference and most valuable weapon. It must be shown that giving a person with a disability a job is not only the most equitable solution, but also the most profitable.

In order to achieve this objective, the guiding principle outlined at the outset must be borne in mind, namely that education and training must adapt to the changing requirements of the market. Moreover, these requirements must be harmonized with the interests, preferences and needs of every person with a disability. This is the great challenge of the transition process from school to work.

Neither schools nor individuals alone are able to meet this challenge successfully. The view of the exclusive educator must be abandoned and all the forces in the labour market must be involved. This has a dual objective: firstly, because these forces can guide the process with the greatest realism and collaborate in its execution (bearing in mind what has been said about the role of enterprises); secondly, because they hold the keys to the market. Educating and training a person is not enough. The culmination of the process comes only when a young person with a disability is given the opportunity to exercise his or her right to work and participate in society as an adult on an equal level.

Note

1. *Plan para la reactivación del empleo de las personas con discapacidad* [Plan to reactivate the employment of persons with disabilities], December 1993, p. 8. This plan was drafted and signed by the highest officials at the State level involved in organizations of and for persons with disabilities.

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RETHINKING TEACHER EDUCATION

N. K. Jangira

Policy shift

The goal of providing quality basic education to all children is now a globally accepted reality (World Declaration on Education for All, 1990; Delhi Declaration, 1993). In developing countries, the focus is on access and participation with a reasonable level of learning achievement, while developed countries are concentrating on enhancing standards of achievement. A second trend is also discernible. Developed school systems which have historically operated a parallel system of ordinary and special schools are moving from 'mainstreaming' and integration towards the development of inclusive schools (Ainscow, 1993). For developing systems, inclusive schooling is not an alternative choice but an inevitability (Jangira, 1993b). The goal for both is to organize effective schools for all children, including those with special needs. Planning and implementing this qualitative change to the system is a challenging task indeed.

Although the goal of organizing effective schools for all is common to all countries, the magnitude and nature of the task varies according to how developed the educational services for children with special needs are in each country. For developed countries, it is a qualitative shift because educational provision of some kind is available to all children. In the developing and least developed countries, the range is from exclusion, through minimal provision, to limited coverage in special or mainstream schools. The health and social welfare systems are also inade-

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quately developed in these countries. Owing to the serious lack of resources and the shortage of trained personnel, the educational needs of these children are usually forgotten in plans for basic education (Consultation on Special Education, 1988; Jangira, 1990). The UNESCO Consultation on Special Education made a practical suggestion for synchronizing integrated education and community-based rehabilitation (CBR) to provide cost-effective and meaningful education and training for children with special needs (Hegarty, 1988). An advocacy programme with technical support was launched. More and more countries are now making educational provision for children with special needs an integral component of 'education for all' plans.

A policy paradox relating to integrated education needs consideration. The developing countries, overwhelmed by the complexity of the task, tend to confine policy to the integration of children with mild or, at best, moderate disabilities. In most villages there is only one school. Education of all the children in the village must be in this school. The policy of integrating only children with mild disabilities conflicts with the policy of basic education for all. How is this contradiction between policies to be resolved? Demonstrating that mainstream schools are taking responsibility for meeting the educational needs of all children is essential for instilling confidence in the policy makers. The solution lies in changing the system through a composite area approach, not in confining integration to selected schools which limits basic education provision for children with disabilities (Jangira, 1986; NCERT, 1987; UNESCO, 1987).

This composite area approach has made policy change possible in India. The National Policy on Education (1986) confined the integration of children with locomotor and other mild disabilities, as far as possible, in mainstream schools (India, 1986). The implementation of the UNICEF-assisted 'Project integrated education for the disabled' (PIED) in ten demonstration sites in both urban and rural contexts encouraged policy makers to include children with moderate disabilities in 1992 (India, Ministry of Human Resource Development, 1992*a* and 1992*b*). In practice, children with multiple and severe disabilities have also been integrated in project areas due to the lack of special schools and the commitment to providing education for all that has been generated in these areas. The school system has been prepared for this (Mani, 1994). The 'Multi-site action research project' (MARP) goes beyond universal provision to improving the learning achievements of children through the 'effective schools for all initiative'. The 'District primary education programme' (DPEP), in which the in-service training of teachers is viewed as crucial to success, incorporates this experience.

The school system must change to enable it to respond to the educational needs of all children, including those with special needs. Each school has to accept that it must cater to all the children in its community. This fundamental shift in school policy is to be accompanied by: curriculum reform ensuring access to all children; teacher education reform to equip mainstream teachers with appropriate knowledge and skills; and the building of a support system. The important developments in teacher education are discussed in the following section.

The key to teacher education reform is to develop the confidence of school staff so that they feel they can accomplish this task. Confidence can be developed through effective pre-service and in-service training programmes and ensuring organizational support. What are the implications of this policy shift for pre-service and in-service training? What are the alternative approaches?

Pre-service teacher training

The implication of providing basic education for all children in mainstream schools is that all teachers should be provided with the requisite knowledge and skills to enable them to respond to special needs in the classroom. A number of countries have made provision for such courses. In India, the National Policy on Education suggested that all pre-service teacher-education programmes should include a component on special needs (India, 1986). Such a course can be provided as a free-standing, accredited course or, alternatively, elements of the course can be integrated into the relevant pre-service teacher-training courses. In India, the latter option has been adopted. Table 1 specifies suggested course elements and the points at which they should be inserted into general pre-service teacher education courses ('plugpoints').

TABLE 1. Special needs units and plugpoints in pre-service teacher education courses for general teachers.

Unit on special needs	Plugpoint
Children with special needs and equal education opportunity	Foundation course (social and philosophical bases)
Identification of special needs and functional assessment	Educational psychology course, under 'individual needs'
Curriculum adjustment and adaptation to special needs	Curriculum and teaching courses
Special aids and equipment	Curriculum and teaching courses
Classroom management	Course on teaching and school practice
Support services	Course on school organization

The last five units are also included in practice teaching. Further details are available in NCERT (1991) and Jangira (1993*b*). This is the first-level course. The inclusion of special needs elements in different pre-service teacher education courses is advantageous in several ways.

1. The special needs material acquires the same status in curriculum transaction as any other element.
2. The additional curriculum load is not perceived by prospective teachers.
3. All teacher educators become familiar with special needs concerns.
4. Through this process, special education is demystified.

A second-level intermediate course is offered as an elective course. An advanced course for those teachers interested in acquiring further knowledge and skills in this area has been planned. The content of the level-two course is outlined in Table 2.

TABLE 2. Content of level-two course.

Daily living skills for	visually impaired hearing impaired children with low level of functioning learning disabled orthopedically handicapped.
Orientation and mobility	Braille reading and writing language and speech training special aids and equipment (use, simple maintenance and repairs)
Organization of special services	support to peer teachers providing extra curriculum skills to children mobilization of support from governmental and non-governmental organizations

Both of these courses emerged from the PIED in ten demonstration sites to help prepare schools in the project areas to meet the needs of all children. They were offered as one-week and six-week courses.

If a mainstream teacher who has completed a level-two course is available in a school, peer support might encourage them to run a level-one course for other teachers. The level one and two courses in general pre-service teacher training facilitate both a cost-effective delivery of special needs provision and move the school system toward inclusive schooling.

In-service teacher training

Pre-service teacher education programmes target the limited number of teachers who are annually inducted into the school system to satisfy the needs of attrition or to meet the demands of additional enrolments. The greater challenge lies in preparing in-service teachers to enable schools to be responsive to the specific needs of individual children, particularly the special needs arising from physical and mental impairment. It requires training and retraining both of teachers and of those who provide them with support. A change in existing thinking and practice is needed to effect change in the system which can then, in turn, create effective schools for all children. Training and retraining should be viewed in a broader sense. It includes reflection and problem-solving skills for professional development. The aim is to develop what has been termed as 'pedagogical intelligence' (Ruben, 1989). Obviously, in-service training holds the key to bringing about this transformation. What kind of in-service training should it be? What format should it have? Where should it be located? Who should stimulate and sustain it?

There are several possible models of in-service training on special needs. Some of these are outlined below.

1. Special needs elements can be provided as a component of ongoing in-service training programmes for teachers. The content depends on the available times or the possibility of extending the syllabus and duration of the course.

An awareness-level module that sensitizes mainstream teachers to special needs issues is the minimum that should be included.

2. Exclusive, short courses on special needs can be organized at the national, regional, district and school cluster levels. The level one and two courses are regularly organized in India to encourage integration of children with special needs in mainstream schools.
3. Part-time courses on special needs, leading to additional accreditation, can be offered through appropriate institutions. These can be exclusive 'credit' courses or offered as a component of other courses. They can also be offered on a distance learning basis. Several open universities are offering such courses.
4. School-based in-service training programmes, encouraging a 'whole-school approach' to bring about change, can be an effective strategy. The UNESCO 'Teacher education resource pack' is a useful resource for this approach.

School-based in-service training is an evolving model, whereas the first three methods listed above are well-established. Moreover, it is emerging as a favoured model. In a recent large-scale study on school effectiveness and in a study on 'teacher motivation and training of primary school teachers', over 70% of the teachers preferred school-based in-service training (Jangira, Singh and Yadav, 1994; Jangira, 1994).

EFFECTIVE IN-SERVICE TRAINING

Lessons from research relating to the effectiveness of in-service training have been documented in Joyce and Showers (1988), Jangira (1979, 1986, 1995), Jangira and Ahuja (1992), and Ainscow, Jangira and Ahuja (1995). The guiding principles emerging from the analysis of this research are summarized below.

- In order to change an education system, training should be provided to stakeholders, policy makers and funders;
- Training should be continuous, not just a 'one-time' course;
- Training should be relevant and meet the unique needs of individuals in the workplace;
- Training should be provided in a situation as close to that of the workplace as possible;
- Training should provide for demonstration, practice and feedback to ensure mastery over knowledge and skills;
- Individuals should be given the opportunity for constant reflection and review of their new knowledge and skills in the context of practice in the workplace;
- Individuals should be encouraged to plan action research to transfer and 'fine-tune' new skills to the real, practical demands of the workplace;
- The training design should allow for planning support and collaboration in the workplace as integral components to ensure transfer of knowledge and skills and to institutionalize the change.

One important implication is that the transfer of new knowledge and skills to be acquired during in-service training should be consciously planned in the training design. Taking this into account, two training transfer designs have been created. In the 'cumulative training transfer' design, the in-service training programme is delivered as a workshop or a short course. It is then followed by transfer to school or classroom practice. In the 'simultaneous training transfer' design, the delivery of the course is spread over a longer period. The teachers are given time in between the units to implement the acquired knowledge and skills in the classroom, reflect on the experience and share with colleagues and the 'change agents'. The operational details of both designs are given in Jangira and Ahuja (1992).

SCHOOL-BASED IN-SERVICE TRAINING

School-based in-service training can also be viewed from the supply and demand dimension. It depends on the source of stimulation and the type of assistance required. The schools planning change can be placed into four categories:

- having demand stimulation from within the school which requires no external technical assistance;
- having demand stimulation from within the school which requires external technical assistance;
- needing external stimulation but no external technical assistance; and
- needing both external stimulation and technical assistance.

The numbers of schools in the first category are few. Most of the schools fall into the last category. If these categories are considered hierarchical, along a dependence-independence continuum of change through staff development, the effectiveness of school-based in-service training should be measured in terms of moving from the last to the first category along with other change dimensions.

The experience with the development and dissemination of the UNESCO 'Teacher education resource pack' provided rich experience in this area. Initially, a field test was undertaken following a workshop and seminar in Zimbabwe in 1990. The testing was spread over a period of eleven weeks. This experience, along with those of other participating countries, provided input for the first sub-regional workshop and seminar in Delhi to disseminate the resource pack. The design was further refined in the 'Multi-site action research project' (MARP) training and planning workshop in Mysore, where the elements of practice and feedback involving the delivery of new units and the planning of action research projects as a means of institutionalizing innovation were added. During work with the Lao People's Democratic Republic in 1993, this approach was rationalized further in the context of developing countries. The design emerging from this experience is summarized in Table 3.

TABLE 3. Design for school-based teacher development to institutionalize change.

Phase	Duration	Activities
Pre-project phase	Open (depends on immediate availability of material and resources)	Development of training design Identification of change agents Identification of schools/institutions Selection/development of resource material, including measuring tools
Training and planning phase		Orientation to the concept and practice of organizing effective schools for all Delivery of five or six units of the resource pack/training material
(a) Training in concept and practice	Five days	Debriefing and consolidation of the process and practice
(b) Training and practice with peer teams	Three days	Practice in delivering new units with new material, followed by feedback
Planning	Two days	Planning of the action research and identification of support needs from resource institutions and the department
Implementation	One academic session	Faculty meeting to share plans and build environment for introducing the innovation/change Peer training to prepare the whole school Taking the change to classroom practice Continuous evaluation faculty and pupil perceptions Review of strategies and modifications
Follow-up and support	Depends on the spread of activities	Providing resource support Monitoring of progress by resource institution Mid-year review and sharing of experiences Inter-school visit for on-the-spot study and sharing of experience at the end of the year
Wider sharing of the experience	Open (as early as possible)	Writing and publication of report Publication of papers based on the experience

There are several success stories emerging from this design during the implementation of the MARP. One striking story of a school 'on the move' is presented as an example.

A SCHOOL ON THE MOVE: THE NAVYUG MUNICIPAL PRIMARY SCHOOL, NEW DELHI

This is the story of a school falling into the first category of those schools planning change; that is, it had demand stimulation from within the school but received no external assistance. The school having stimulation from within was ready to work with the resource pack following a process of self study, reflection and discussion and finally implementation in actual school practice. The action research design was also prepared by the school staff. A copy of the Indian-adapted version of the

UNESCO resource pack (with a Hindi translation) was given to the Head of the Navyug Municipal Primary School in New Delhi. The school caters to children from different socio-economic groups. Over the last decade, the Head, Mrs. Uma Tomar, has developed what started as a small school to one that now has twenty-seven teachers and 640 pupils aged 6–14 years. Class size is a little over forty. For the last two years, Mrs. Tomar has used the resource pack as the basis for staff development in her school. The entire staff has participated in workshop sessions, using the material and their new skills in the classroom. Sufficient time has been allocated to support these activities. The non-teaching staff also feels motivated to support the teachers.

The impact of the staff development activities is clearly visible when a visitor enters the school: the children are engaged in active learning approaches and co-operative learning can be seen in action. In one class, pupils may be working in small groups; in another, peer tutoring may be in progress. Seeing pupil involvement in assessment is very rewarding and its significance is enhanced when seen in the context of a prescribed curriculum and rigid examinations. It is an example of flexibility and autonomy that a motivated staff can develop in its delivery of the curriculum. The local education authority showed some concern about the proposed changes and was perhaps even sceptical, but the Head and the staff explained and the positive pupil reactions silenced them. Now, the administrators themselves have undergone a change of heart and are supportive of this new practice. The school environment exudes a feeling of change. The school walls seem to smile and speak, displaying posters that illustrate the work carried out by the staff during learning workshops. The posters depict significant themes from the pack (active learning, learning together, parents as partners, etc.). In the classrooms and corridors there are displays of pupils' work. Pupils' drawings and learning preferences are displayed in the classrooms.

Interacting with the staff is a rewarding experience; their involvement and enthusiasm are perceptible. They feel proud of the achievements of the staff development programme and they find the collaborative work pleasant and fruitful. They are eloquent about planning together, supporting each other, sharing experiences, reflecting and helping one another in solving problems. The support of strong leadership was vital in helping them through a difficult process. Mrs. Tomar provided this leadership but in such a way that everyone now feels confident that they are all leaders in the task of school improvement. As one teacher said: 'At the end, we were all leaders'. This has not been accomplished overnight. It is the outcome of a sustained effort and organizational flexibility. The Head herself sometimes covered classes so that teachers could be released to attend training; sometimes classes were taught together. Non-teaching staff also provided support. What is still more significant is that, on occasion, children worked on their own when the staff were involved in learning and preparing exercises.

The impact is clearly visible. All pupils learn and achieve. No one feels left out. The social atmosphere is supportive of universal participation and shared initiative. The relaxed staff and pupils have made the learning-teaching process a joy-

ful one. Both staff and students celebrate the success of pupils in the classroom, helping each pupil to overcome learning difficulties. The school has also been able to integrate children with disabilities. Pupils achieve a reasonably high academic standard. The school is an embodiment of the 'effective school for all'.

Education and training of special teachers

There are special schools for children with different disabilities. The number of special schools may be declining in developed countries as a result of the downward population trend that affects school enrolments. The number of special schools may also be declining owing to a policy shift towards the promotion of mainstreaming, integration, regular education initiatives and inclusive schooling. The transition will take time. In some places, special schools are being used to support integration. Some non-governmental organizations (NGOs) assist the least developed countries by establishing special schools as well as supporting integration and community-based rehabilitation. Special education teachers are also required to support integration in mainstream schools which entails providing them with additional training.

Conventional training programmes for special teachers are undergoing change. The following trends are emerging.

1. There is a clear trend of giving a broader base to the classic single disability teacher-training programmes. These courses now include a core course on all disabilities as well as specialization in one, which extends the function of the training programmes.
2. Training of support teachers in more than one disability is also in evidence, since specialist teachers for each type of disability are not available in rural areas in the developing countries. In India, a new training programme for support teachers has been designed. The trained mainstream teachers take a multi-category course that enables them to provide peer support to cluster schools in working with children with sensory and mental impairments.

The comparative cost-effectiveness of levels one and two of this course is being studied (NCERT, 1994). Logic demands that training in special needs is integrated into general teacher training. Furthermore, as special schools are to serve as resource centres for integration, training programmes for special school teachers should provide them with the skills to work with mainstream teachers and to organize training programmes for them.

Networking for change

Changes to the education system that will make teacher training responsive to the needs of inclusive schools will not occur without a networking of institutions and agencies at different levels. National, regional, district and sub-district agencies will need to provide technical support. The institutions providing on-site courses, both full-time and part-time, and those offering distance learning programmes

must converge on pre-service and in-service teacher education reform. The resource institutions will have to provide progressive coverage through in-service training programmes and support for this complex system change. Table 4 summarizes the task of networking.

TABLE 4. Networking for change.

National/state governments	Policy and finding support
National/state technical resource organizations	Programming support Prototype courses and material design
University departments/colleges of education	Customizing/developing need-based courses Offering full-time/part-time courses
Local education authority	Micro-plans and programmes for change through whole-school approach
School clusters	Stimulation, supervision and support to schools

Table 4 is confined to networking at the national level. It can also be extended to institutions and agencies at the international level. The development and dissemination of the UNESCO 'Teacher education resource pack' at the international level and the 'Multi-site action research project' (MARP) in India provide examples of functional networking for change.

MARP prepared the ground for vertical and horizontal networking, but the project also experimented with the process of institutionalization of innovative change. It involved thirty-three co-ordinators from twenty-two institutions or agencies (nine district institutes of education and training, eight colleges of education and university departments, three schools and two NGOs). Two individuals from each institution were selected to encourage collaboration and mutual support in the workplace. They were provided with training and practice in the use of the resource pack material and helped to develop action-research projects in pre-service and in-service training contexts.

Action-research projects for the participating institutions were aimed at developing the knowledge and skills of change agents and building up an institutional capacity to encourage the use of innovative material and strategies. The projects also aimed to generate research evidence based on earlier experiences that suggested the implementation process would take eighteen months to achieve full integration of the new approach into standard institutional practice. The action research followed a pre-test/post-test single group design. Pupils and school-teachers were selected randomly. The participants were to document the process, and data were to be reported with examples. The need to synthesize data from different sources — interviews, attitude scales, evaluation processes, photographs and audio and video tapes — was stressed. Evaluation of teacher and pupil behaviour was analyzed using the following measures: teacher attitudes towards teaching and learning; pupil participation in learning-teaching inventory; classroom drawings (teacher and pupils); and the learning preference questionnaire.

The project involved a total of 338 experienced teachers, 248 pre-service teachers and 9,986 children in 115 schools spread over twenty-three sites in different parts of the country. The attitudes of teachers and pupils towards learning altered after introduction of innovative teaching, with the key change being that the children perceived classroom transactions as interesting. Not surprisingly, learning achievements improved significantly (Jangira and Ahuja, 1993).

These sites have now become resource centres for the further extension of the project in neighbouring schools. It exemplifies networking of teacher-training institutions, school clusters, individual schools and NGOs working with teachers. The network also includes local education authorities. An expansion of the experiment to reach out to a larger number of schools through the district institutes of education and training under the district primary education programme is being planned. It is a step to move towards the institutionalization of system change.

The MARP is just one model and member countries will need to design networking plans to suit their own contexts. Networking is essential for effective teacher education reform.

The need for national plans

Member countries are committed to improving the quality of basic education for all children by the turn of the century. Throughout history, children with special needs have been educationally deprived. Teachers and teaching must be responsive to their needs. To this end, each member country should prepare a detailed plan together with a timeline. The plan should not only identify goals but also include adequate funding to implement the reforms. For developing countries, funding from international agencies should supplement the mobilization of their own resources to make this planned provision a reality. Developed systems should also prepare plans for a progressive movement towards inclusive schools.

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UNESCO TEACHER EDUCATION PROJECT: 'SPECIAL NEEDS IN THE CLASSROOM'

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The recognition that schooling for children with special needs is part of the overall movement towards education for all means that teachers in regular schools need to be prepared for this challenge. In this article we will describe the work of an important UNESCO initiative that is making a significant contribution to these efforts in many countries. This project, known as 'Special needs in the classroom', has led to the dissemination of the 'Teacher education resource pack'.¹

This article addresses the following questions: How was the UNESCO resource pack developed? What is the rationale? How is it being used? What have we learned? Specific attention is given to how the pack is being used as the basis of regional, national and school developments, using examples from several countries.

How was the pack developed?

The aim of the UNESCO teacher education project 'Special needs in the classroom' is to develop and disseminate a resource pack of ideas and materials that can be used by teacher educators to support teachers in mainstream schools in responding to pupil diversity. In order to develop the pack, an international network of teachers, teacher educators and administrators was created. The members of this net-

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work read draft materials, made suggestions and, in some cases, put forward materials of their own. Following this period of consultation, a pilot version of the pack was tested in 1990–91 by a team of resource people in eight countries (Canada, Chile, India, Jordan, Kenya, Malta, Spain and Zimbabwe). The style adopted in these trials bore many of the characteristics of ‘action research’ where participants are encouraged to work in teams using reflective thought, discussion, decision and action in order to develop and refine the thinking and practice of the project. Within this broad orientation, the resource team collected detailed data about their use of the pilot materials and produced case studies of their work. They also kept journals in which they made detailed records of their actions, thoughts and feelings, as well as their interpretations of the data they collected.

These data indicate that in all the field-testing sites the materials were used as intended and that course leaders worked in ways that were largely consistent with the thinking associated with the project. The evidence also supports the view that the content of the materials is appropriate for teachers in each of these national contexts, and focuses on issues that they find meaningful and relevant. Furthermore, it seems that the activities and process used are successful in helping both teacher educators and teachers to develop their thinking and practice.

Through systematic analysis of all these data, a series of rationales was developed that could be used to inform the design of the resource pack. Specifically, rationales were developed that could provide specifications for the content of the materials, the approaches to teacher education and the strategy for dissemination. As a result of these formulations, the pack was rewritten to include a manual and associated video programmes. Subsequently, it has been introduced to groups in over fifty countries and is now the basis of regional development projects in Africa, Asia, Latin America, the Caribbean and the Middle East, as well as part of major national initiatives in China, Ghana, India and Thailand. The pack has been found to be useful in in-service, pre-service and school improvement contexts.

What is the rationale?

The approaches to teacher education adopted in the UNESCO project are based upon a particular view of how teachers develop their practice. These approaches assume that the development of practice occurs in the main as a ‘trial and error’ process through which teachers develop their repertoire of responses as a result of what seems to work for them. Their previous experiences as pupils themselves may be very influential in shaping this development process, in addition to their observations of other practitioners—including those who lecture them in teacher education contexts. In this way, teachers create their own individual theories of teaching that guide their day-to-day practice. These theories are largely unarticulated. They represent the ‘tacit knowledge’ that has been created through a mainly intuitive process of learning from experience.

Within the UNESCO project we have attempted to work in ways that are consistent with this perspective of how teachers learn. Specifically, we have tried to

develop ways of working that can help teachers to become more confident and skilful in learning from experience through the process of reflection. Rather than simply leaving this to chance, we believe it is possible to create contexts that enable individuals to recognize the value of this form of learning and to gain greater control of the processes involved.

There is, however, a rather obvious weakness in this emphasis on learning from experience through a process of reflection. It may lead to situations where individuals are left alone to make sense of their experience and to draw whatever conclusions they can determine. It is, therefore, potentially a restricted and restricting source of learning. Consequently, within the UNESCO project we have placed considerable emphasis on collaboration in order to widen the resources available to individuals as they seek to develop their thinking and practice through the process of personal reflection. The aim is to encourage teachers to recognize the value of dialogue with others in order to gain better understanding and to see further possibilities for improvements in practice. In this respect, 'others' include colleagues, pupils, parents and, of course, teacher educators. All of these are seen as sources of inspiration and support that can be used to facilitate learning. In addition, they are all seen as offering alternative perspectives that can help individuals to interpret their experience in ways that may suggest alternative possibilities for development. Information from articles and books provides further resources that can be used to inform and extend the process of learning from experience.

These two ideas, reflection and collaboration, are at the heart of the approaches being developed within the UNESCO project. Our experience of using approaches based upon these ideas in many different countries suggests that they can be influential in encouraging teacher educators and teachers to see improvement as a fundamental area of their work. We have also found that these ways of working can encourage teachers to adopt a more flexible view of difficulties experienced by pupils in their classes—a view that sees such difficulties as sources of feedback on existing classroom arrangements. Indeed, this feedback provides information as to how classroom arrangements can be improved in ways that are beneficial to the whole class. As a result, schools can be helped to provide teaching that is more effective in responding to the experience and existing knowledge of individual pupils.

• Our attempts to introduce teacher educators and teachers to these two strategies are based upon five sets of approaches that have been developed and refined within the project. These are as follows:

1. *Active learning*: Approaches such as co-operative group work that encourage participants to engage with opportunities for learning.
2. *Negotiation of objectives*: Approaches that enable teacher development activities to take account of the concerns and interests of individual participants.
3. *Demonstration, practice and feedback*: Approaches that model examples of practice, encourage their use in the classroom and incorporate opportunities for supportive feedback.

4. *Continuous evaluation*: Approaches that encourage enquiry and reflection as ways of reviewing learning.

5. *Support*: Approaches that help individuals to take risks.

Teams in many countries are now using the UNESCO resource pack as part of their teacher education activities. As they do so, they are involved in further research that will contribute to the refinement and expansion of the ideas included in the materials. In the next section we provide accounts of the developments currently going on in Latin America, China, India and Italy as examples.

How is the pack being used?

REGIONAL DEVELOPMENT (LATIN AMERICA)

Since 1991, a series of training activities at the national and regional levels has been developed in the Latin American region with the aim of disseminating the project 'Special needs in the classroom'. The project has had different phases during its implementation and has been adapted in the various countries of the region.

1990–91, First phase: experimental implementation

Once the pilot version of the pack was validated in 1990 with a group of regular classroom teachers in Santiago, Chile, another three experimental activities were carried out with a view to verifying its pertinence and usefulness in other countries of the region. Therefore, teacher training workshops intended for regular and special education teacher trainers and specialists were held in Quito, Ecuador; La Paz, Bolivia; and Lima, Peru. The outcomes of the three workshops were very positive since both the contents of the UNESCO proposal, as well as the principles and pedagogical strategies suggested, were evaluated by the participants as being pertinent.

1992–94, Second phase: project dissemination and follow-up dissemination

In this stage, emphasis was placed upon the training of human resources (national co-ordinators) to act as multiplying agents of the project in their own countries. In this connection, co-ordinator training workshop/seminars were carried out at both regional and national levels, mainly intended for teacher trainers working in higher education centres, supervisors and specialists of the ministries of education. The majority of these activities were organized and encouraged by the special education departments of the ministries of education. The model used for the training of co-ordinators is based on the guidelines and learning strategies of the project 'Special needs in the classroom'; i.e., active learning, objectives, demonstration, practice and feedback, continuing evaluation and support.

At national level, the following workshops have been conducted in three countries of the region: Ecuador (twenty national co-ordinators), Peru (twelve national co-ordinators) and Chile (thirteen national co-ordinators). At regional level, a workshop-seminar was carried out in Bogota, Colombia in which there

were representatives from the following countries: Mexico (two), Bolivia (two), Colombia (four), Panama (one) and Costa Rica (two).

Subject to some changes determined by purpose, resources, time, group characteristics and the reality of each country, the training model used consisted of a demonstration workshop followed by a supervised practice workshop. The demonstration phase allowed the future co-ordinators, acting as students, to experience the workshop, become acquainted with the use of the material, incorporate the theoretical contents and observe the methodological style used by the facilitators. The learning process ends with a seminar during which the group analyses and reflects upon the experience and the follow-up phase of supervised practice is planned.

In this second phase, participants acting as in-practice co-ordinators are alternatively responsible—in teams of two—for conducting working sessions with the support and supervision of the facilitators. An evaluation exercise occurs every day during which the practising co-ordinators exchange appraisals of their own performance, receive feedback from the group and some useful observations from the facilitators.

The programme finishes with a second seminar intended for evaluating the training process and preparing plans to disseminate the outcomes of this experience in their own countries.

Whilst the disadvantage of the above model is the high cost (it requires at least two weeks for the activities), there is the great advantage that commitment to the project is encouraged, thus ensuring to a great extent the use of the pack according to the guidelines and purposes for which it was designed.

The information that has been gathered shows variations in the development stages of the project from one country to another, as well as different degrees of engagement among the co-ordinators involved. Countries such as Peru, Panama, Costa Rica, Ecuador and Mexico have carried out several workshops at both pre- and post-graduate levels. The Peru experience is a very interesting one since the pack has been utilized for the training of regular teachers involved in the project 'Integration of disabled children into regular schools', carried out in four provinces of the country with technical support from UNESCO's Regional Office for Education in Latin America and the Caribbean (OREALC) and with funding from the Danish International Development Agency (DANIDA). Bolivia, Colombia and Venezuela have not yet materialized any initiative in relation to the project. Chile is in the process of project formulation.

Part of the follow-up in the region has been to keep the national co-ordinators informed about the project progress in the rest of the world, promoting the exchange of information and the technical collaboration between the co-ordinators and OREALC. Panama is a good example of this kind of collaboration. Two intensive training workshops were held, mainly intended for special education directors of the whole country. This activity was possible thanks to the initiative of Dalis Licona (the national co-ordinator of the project) and to OREALC support.

Forthcoming plans in South America include:

- A sub-regional training seminar workshop for co-ordinators of Mercado Común del Sur (MERCOSUR) countries (Argentina, Brazil, Paraguay and Uruguay) is foreseen.
- The possibility of carrying out a sub-regional workshop using the Central American model with the collaboration of Dalis Licona from Panama is being studied.
- The database for launching an interchange network on experience and information on the project is being worked on.

NATIONAL DEVELOPMENT (CHINA)

The objectives of applying the UNESCO resource pack in China are:

- to disseminate the ideas and theories of 'Special needs in the classroom' in teacher training programmes;
- to promote integration practices in regular school settings;
- to establish a starting point to develop the special education curriculum in teacher colleges; and
- to provide a foundation to compile training material that would be appropriate to China's specific conditions.

Thus the pack has been applied in both pre-service teacher training and in-service teacher training. In order to achieve these objectives, a series of activities was carried out.

1992 Activity one—the original syllabus draft

In order to develop the curriculum for pre-service teachers, it was necessary to define the domains and contents of the training programmes. Many experts and teachers participated in this activity to determine the original draft of the curriculum syllabus.

1992 Activity two—translating the UNESCO resource pack into Chinese

In order to provide experimental training material for pre-service and in-service teachers and provide a foundation for compiling training material, the UNESCO pack was translated into Chinese.

1992 Activity three—a workshop for in-service teachers

In order to promote integration practices and to replenish ideas and theories on integration, a training workshop for in-service teachers was held in Beijing at the end of 1992. The UNESCO pack was adopted in the workshop. During the workshop, basic strategies and skills, such as active involvement, demonstration, co-operative teaching and co-operative learning, were demonstrated and practised. In addition, several evaluation formats were applied to collect participants' feedback about the materials.

1993 Activity one—a national meeting for the training pack

In order to compile teaching materials which will be suitable to the specific conditions of China, a meeting was held to revise the first draft of the syllabus, evaluate the UNESCO training materials and determine what to adopt from or add to the training materials.

1993 Activity two—a workshop for elementary school-teachers

Classroom integration is a new challenge for the Chinese education system. In order to change the practices in regular schools and to develop curriculum for teacher training colleges, it is crucial to train related personnel. Thus, workshops were held in every local district so as to bring about changes. The participants consisted of local education officials, school administrators, teachers and researchers. Several hundred people took part in eight training workshops.

1993 Activity three—developing a curriculum for teacher colleges

After all the above initiatives, some teacher colleges began to develop a curriculum for special needs. The following activities were implemented to support this development: the publication of the Chinese version of the UNESCO pack and other materials; a workshop on ‘Lesson plans for college teachers’ was held in Beijing to support the initiative effort in the curriculum implementation; and implementation of a pilot course on special educational needs in a few teachers’ colleges which were selected as experimental schools for the project.

1993 Activity four—summing up experiences of developing a curriculum for teacher colleges

After a semester, a meeting was held to summarize the experiences of developing a curriculum for teacher colleges. Local specialist teams reported their experiences, students’ attitudes and reflections about the curriculum. In general, the concluding reports gave positive information about the curriculum. However, further endeavour is needed for a substantial change.

Conclusions

Throughout the above activities during the last two years, the outcomes were satisfactory. In particular, the following have been achieved.

1. Approximately 500 teachers, school administrators and local education officials received training for classroom integration. They have become a powerful force to bring about changes in ten provinces in China.
2. Approximately twenty teacher colleges in the pilot study have developed their curriculum for special educational needs. Results from the evaluation indicate that teacher trainers and the students (the trainees) both enjoyed the learning experience and had a positive attitude towards the changes.
3. Through the pilot study, a final syllabus of the course on special educational needs was determined. Many materials were collected and developed. These

made a good basis for compiling the new course materials and for the large-scale implementation of change.

NATIONAL DEVELOPMENT (INDIA)

The last decade has been significant for educational developments in India. Previously, the range of provisions for children with special needs varied from exclusion, through minimal provision, to limited coverage in special or regular schools. The health and social welfare systems were also inadequately developed.

Lately, however, it has been realized that inclusive schooling is not an alternative choice but an inevitability if the dream of providing quality basic education to all children is to ever become a reality. This necessitates teacher education reform to ensure success with access to all children. We believe that design models will have to be developed within India's unique socio-cultural and economic contexts. Theoretically sound and practically feasible teacher development programmes are our goal.

Of the many initiatives taken towards meeting the needs of all children in the general school system, the UNICEF-assisted 'Project integrated education for disabled children' (PIED), begun in 1986, was seen as a significant breakthrough.

However, we also became aware of several limitations. Despite an emphasis on integration, we found that categorization, labelling and exclusion from educational activities continued. We also noticed that more school children were being identified as having special needs. Were schools identifying more marginal children as pupils with special needs in order to take advantage of additional funding? Also, despite our efforts to make the training of teachers learner-centred, the didactic component of teacher training continued to be on the high side.

At this juncture (in mid-1989), we were invited to act as co-ordinators of the advisory team to review and select materials for the UNESCO project. The philosophy and approach seemed to be relevant to the issues arising out of our review of PIED.

The draft UNESCO pack was ready in early 1990. We learned to transact the approach in different teacher education contexts at a workshop and seminar held in Zimbabwe in 1990. We planned to use it in India in pre-service and in-service contexts, suggest modifications and new materials, and develop video programmes.

The field test was done in an in-service situation and in a pre-service context. The testing was spread over a period of eleven weeks. The gaps between the training periods were utilized by the teachers to incorporate learning and teaching activities in their classrooms. The pre-service teachers also used the knowledge in their practice teaching. Overall, the field testing indicated a positive change in teachers' attitudes, classroom climate and school atmosphere.

All this experience, as well as our learning from other friends engaged in similar exercises across the globe, was summarized in a sub-regional workshop and seminar for Asia held in November 1991.

Following these earlier experiences, a national project was designed known as the 'Multi-site action research project' (MARP). It provides examples of functional networking for change. Besides preparation of vertical and horizontal networking, the project experimented with the institutionalization of innovative change. Specifically, the objectives of the MARP were as follows:

1. Encouraging teacher training institutions at primary and secondary levels and schools to join. Out of forty institutions approached, twenty-two participated. The project involved thirty-three co-ordinators from twenty-two institutions (nine district institutes of education and training, eight colleges of education and university departments, three schools and two NGOs). Two individuals from each institution were selected to encourage collaboration and mutual support at the workplace.
2. Training and practice in the use of the UNESCO pack was provided, based on all experience gathered in Mysore from 27 November to 4 December 1991.
3. Action research projects were developed in pre-service, in-service and school-based contexts.

The various projects followed a pre-test/post-test, single group design. Pupils and students were selected randomly. Participants were required to document the process and provide data with examples.

The project involved 338 experienced teachers, 248 pre-service teachers and 9 986 children in 115 schools spread over twenty-three sites in different parts of the country. The project, now over a year and a half old and still going strong, has become part of institutional practice.

The project sites have become resource centres for further extension of the project in neighbouring schools. It exemplifies the networking of teacher training institutions, school clusters, individual schools and non-governmental agencies working with teachers as well as local education authorities. It has widely influenced policy formulations for training in-service and pre-service teachers as a component of educational reform in our country. In addition, the methodology has been included by policy-makers and planners in various national teacher education programmes.

Expanding the experiment to reach out to a large number of schools under district primary education programmes is being planned. It is a big step towards institutionalization of systematic change. In-service training of teachers is being viewed as crucial to its success.

In-service and pre-service training requires teaching skills to teachers and those who provide support to them. It involves changes in thinking and practice to bring about systematic change and to organize effective schools for all children. It includes reflection and problem-solving skills for professional development. Everyone needs to be involved. Training should be continuous, relevant and as close to the workplace situation as possible. Provision for demonstration, practice and feedback to ensure mastery over knowledge and skills in the context of the workplace is essential. Individuals should be encouraged to plan action research to transfer and fine-tune new skills according to demands. It is essential to explore,

plan and support collaboration in the workplace as an integral component of the training design to ensure the transfer of knowledge and skills and to institutionalize the change. Our experience in India indicates that school-based in-service training programmes encouraging a whole school approach help to bring about systematic change and can be an effective strategy.

SCHOOL DEVELOPMENT (ITALY)

For some years now, Italian mainstream schools have attempted to accommodate students with special needs. However, this integration policy has experienced considerable difficulties since many teachers feel unprepared for the demands this policy makes within their classrooms. Clearly, there is a need to provide in-service education that will assist schools in responding to this challenge.

Over the last two years, a pilot project has been instigated in the Trieste district to explore the use of the UNESCO pack as the basis for whole school development. In September 1993, teams of co-ordinators from four schools took part in a demonstration workshop followed by a series of meetings to plan school-based initiatives. As a result, each school launched a staff development programme aimed at increasing the level of teaching flexibility in order to respond positively to student differences.

Staff at Codroipo Elementary School (working in math, reading, science, history and physical education) introduced pair and group work in seven classes, thereby encouraging personal reflection about one's own learning and outcomes.

S. Vito al Tagliamento Elementary School staff have been working to develop co-operative group work approaches in four classes, concentrating particularly on writing in the curriculum. The pupils have been completing questionnaires in order to evaluate their new experiences.

Benco-Pitteri Junior High School staff have been working in four classes to develop approaches to co-operation and group work. Subjects particularly targeted have been math, English, Italian literature and science.

Staff at Giacich Junior High School have been developing approaches to group work in three classes; in particular, focusing on different strategies for structuring group work and encouraging individual reflection on the learning process.

These initiatives are still in their early stages. However, the evaluations carried out thus far suggest that teachers appear to be becoming more and more productive, creative and interested. Much emphasis has been placed on teachers working collaboratively in each others' classrooms and on attempts to develop a common instrument to assist in carrying out mutual observations of practice.

The new teaching methods have been well received by students in the four schools. Note has been taken of improved relationships between students and greater involvement of those with particular difficulties. In this respect, the emphasis on more structured group learning approaches has been well received. Despite these early successes, much is still to be achieved. In particular, some teachers

remain resistant to what is going on and will need more assistance and encouragement.

In due course it is intended that this small-scale pilot project will provide the basis for developments in other schools. At that stage, the experience of the teachers in the pilot schools will provide a strong basis for dissemination of this programme. In addition, these schools will offer models of good practice that can be used to illustrate what is possible.

What have we learned?

Our experience of setting up initiatives based upon the UNESCO pack in a range of countries indicates that participants must anticipate and be prepared to meet difficulties that are likely to occur. Periods of 'turbulence' are an inevitable feature of attempts to innovate in educational contexts. The nature of this phenomenon varies from place to place, but in general it seems to be the result of the reactions of individuals within the system to ideas and approaches that disrupt the status quo of their day-to-day lives.

In the light of these likely difficulties, it is vital to create a strong infrastructure of team work so that individuals can support one another in dealing with the inevitable pressures of leading the process of change. It is also important that innovations are conceptualized in ways that allow flexibility for them to accommodate the circumstances in particular contexts.

From our experience in this particular UNESCO project, we have noted five key strategies that seem to facilitate the implementation of innovations.

THE USE OF ADAPTABLE MATERIALS

The rationale of the project has led to the preparation of teacher education materials that are intended to encourage reflection and collaboration. Consequently, the materials are designed in such a way as to include short pieces of text that will stimulate course participants to draw on their own experience and knowledge. Course sessions focus on agendas related to workplace concerns and address problems faced by teachers in their classrooms. It is also vital that the content of the materials is based upon well-developed principles and a cohesive rationale.

PREPARATION OF PERSONNEL

An important key to successful project implementation is the careful preparation of those personnel who will be asked to adopt co-ordinating responsibilities. Within the UNESCO project, small teams of co-ordinators are created in particular settings (for example, in a college or a school). They are introduced to the thinking and practice of the project through demonstrations, explanations of theory, practice and feedback. Members of the teams then collaborate in the imple-

mentation process at their workplace, using the notion of 'peer coaching' where partners assist one another to experiment with new approaches.

DELEGATION OF DECISION-MAKING

In order that local circumstances and needs can be accommodated, it is helpful for planning decisions to be made by those near to 'the action'. Consequently, within the project, co-ordinators are asked to take responsibility for formulating their own action plans. Appropriate adaptations are made to the materials and, at the same time, co-ordinators develop a commitment to the success of their initiative. Loyalty amongst members of the team further contributes to this sense of responsibility for what occurs. We have found that using action research is a powerful means of encouraging these developments.

OPPORTUNITIES FOR PERSONAL DEVELOPMENT

Project success is often dependent upon the actions of particular individuals. As a result, individuals are encouraged to see their involvement in the project activities as a means of developing their careers. In addition to the recognition they may receive for taking a lead in a significant innovation, they may be offered other opportunities that provide further incentives. For example, they may be invited to contribute to a publication or to travel to other districts to assist in the development of new initiatives.

SUPPORT AT ALL LEVELS

Involvement in innovative projects can sometimes be stressful, particularly during the early days when there is a strong possibility of turbulence. Consequently, the implementation strategy must place particular emphasis on the establishment of a support system for key individuals. Of course, the creation of co-ordinator teams is an important factor here, but we have found it helpful to encourage people to think strategically about other possible sources of support. It is particularly critical to ensure the goodwill of important individuals and agencies within the community so that, at the very least, their active opposition is prevented. The establishments of networks of communication, both formal and informal, are important means of encouraging a feeling of involvement in project activities.

Some final reflections

At the outset of the UNESCO project 'Special needs in the classroom', a number of colleagues suggested that the idea of a single resource pack that could be used in many countries was impossible. Their concern was that contextual and cultural factors would make the content of such a pack unsuitable in many countries. In some senses, of course, these colleagues are correct. If we were to develop a pack

requiring the rigid acceptance of specific content, it would only be relevant in a limited range of contexts. This is one of the reasons why our approach has been to emphasize process rather than content. The resource pack is therefore used to stimulate the creation of appropriate responses to specific situations rather than to encourage the adoption of ready-made prescriptions imported from elsewhere.

This is arguably the most significant outcome of the research associated with the project. We have learned that improvements in teacher education are most likely to occur when groups of people collaborate together to explore their experiences and understandings. This often inspires creativity and innovation.

Therefore, those wishing to develop innovative projects in education must remember the important message that people matter most. The best strategy is to create networks of colleagues who are encouraged to collaborate in making the innovation succeed. They may draw on ideas and materials from elsewhere, but the basis for improvement is their own combined efforts. In our view, this message applies equally to regional, national and school-based initiatives.

Note

1. See Lena Saleh, *Teacher education resource pack: special needs in the classroom; student materials*. Paris, UNESCO, 1993.

Further reading

More detailed accounts and discussions of the UNESCO teacher education project 'Special needs in the classroom' are available in the following publications:

- Ainscow, M. Teacher education as a strategy for developing inclusive schools. *In*: Slee, R., ed. *Is there a desk with my name on it? The politics of integration*. London, Falmer, 1993.
- . Beyond special education: some ways forward. *In*: Visser, J.; Upton, G., eds. *Special education in Britain after Warnock*. London, Fulton, 1993.
- . Teacher education and special needs: some lessons from the UNESCO project 'Special needs in the classroom'. *In*: Mittler, P., et al., eds. *Special needs education (World year-book of education)*. London, Kogan Paul, 1993.
- . *Special needs in the classroom: a teacher education guide*. London, Jessica Kingsley/UNESCO, 1994.
- . Supporting international innovation in teacher education. *In*: Bradley, H.W., et al., eds. *Developing teachers, developing schools*. London, Fulton, 1994.
- Ainscow, M.; Echeita, G. Necesidades especiales en el aula: un proyecto de la UNESCO [Special needs in the classroom: a UNESCO project]. *Cuadernos de pedagogía* (Barcelona), no. 226, p. 60–62, 1994.
- Ainscow, M.; Echeita, G.; Duk, C. Necesidades especiales en el aula: una iniciativa de la UNESCO para la formación del profesorado en el ámbito de la integración escolar [Special needs in the classroom: an initiative of UNESCO for teacher training in the integrated school setting]. *Aula de innovación educativa* (Barcelona), no. 31, p. 70–78, 1994.

- Ainscow, M.; Jangira, N.K.; Ahuja, A. Responding to special needs through teacher development. *In: Zinkin, P.; McConachie, H., eds. Disabled children and developing countries.* London, MacKeith Press, 1995.
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SERVING STUDENTS WITH SPECIAL NEEDS: EQUITY AND ACCESS

M a r g a r e t C . W a n g

Introduction

There is no question that one of the most pressing tasks for educational improvement in the 1990s is to establish how to respond effectively to the educational needs of the increasingly diverse student populations which schools are challenged to serve; in particular, those children with special educational needs. Clearly, a restructuring of schools is occurring to enable children who require additional educational and related service support to be reached more effectively. A major feature of the restructuring process has been described as 'progressive inclusion'; that is, the gradual increase in the number and proportion of children with special needs who receive 'special education' services while enrolled in mainstream classes and schools (Hegarty, 1993; Wang, Walberg & Reynolds, 1992; Will, 1986; World Declaration on Education for All, 1990). Some educators believe the progress is too slow and the inclusiveness too limited, while others see it as too rapid and based on arguable assumptions. But everyone appears to agree that, given the need to achieve high-quality, integrated 'special' intervention, there must be strong teamwork harnessing the knowledge of educators to work towards a vision of equity in educational attainment.

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Recent advances in theory and research, together with innovative practical developments, point to two emerging principles relating to effective special education practices. The first principle aims for moderate learning improvements among children with special needs, and to avoid special placements and instead, to integrate nearly all children with special needs into mainstream classroom settings with children who do not have special needs. The second principle focuses on extraordinary improvements for all children, including and particularly those with special needs, and to employ educationally effective practices that focus directly on classrooms and homes where learning takes place.

The purpose of this paper is to discuss the implications of implementing the second principle outlined above and to discuss how to incorporate proven practice into an inclusive approach to special education delivery.

Advances in theory and research

Substantial conceptual changes during the past two decades have been observed in the type of information available on individual students and their learning. Among the significant developments is an increased recognition that certain personal and learning characteristics are alterable (Bloom, 1976). Examples of variables that are no longer considered to be static include: family characteristics, such as parental expectation and family involvement (Bempechat, 1991; Davis, 1991; Iglesias, 1993); cognition and processes of learning (Segal, Chipman, & Glaser, 1985; Sternberg, Okagaki, & Jackson, 1990); and student motivation and the roles students play in their own learning (Corno & Kanfer, 1993; Schunk, 1984; Wang & Palincsar, 1989). Recognition of the alterable nature of these learner characteristics has led to an increasing interest in finding ways to modify the psychological processes and cognitive operations used by individual students, and reshape learning environments and instructional strategies which accommodate the curriculum and delivery standards ('opportunity to learn' or curriculum access) that are effective in responding to learner differences (Wang, 1992).

Schools' response to student diversity

Despite the advances in theory and research on individual differences in learning and effective practice, this knowledge base has had very little impact on the ways in which schools respond to student diversity. Although well-intentioned, 'special' programmes designed to provide additional educational support have generally not measured up to the outcome standards considered to be critical indicators of educational equity (Gartner & Lipsky, 1987; Reynolds & Ainscow, 1994; Saleh, 1993; Walberg, 1993; Wang, Reynolds & Walberg, 1994). Many students have difficulty in achieving academic success and need better help than they are currently receiving.

Serious problems occur as a result of the ways in which individual differences are characterized and information is generated, and how that information is used

to aid instructional decision-making. In current practice, diversity in the processes of learning and instructional support needs among students is typically handled by classifying or labelling the perceived differences using terms such as 'children at risk', 'low-achieving children from poor families', 'children with learning disabilities' or 'socially/emotionally disturbed children'. These terms are demeaning to students and do not provide any useful information for teachers and administrators in their efforts to provide curriculum and instructional delivery.

In too many cases, special education programmes operate and are funded on the basis of input variables, such as a certain perceived 'deficit' in the child, with little attention to outcomes. That is, students are enrolled in special programmes on the basis of the perceived differences in learning characteristics at the time of entry into these programmes. Programmes for 'special needs' students are often based on a limited curriculum and a simple 'problem-minimizing' instructional mode (Scardamalia & Bereiter, 1989). Maintaining order in the classroom, reducing the curriculum to the teaching of simple skills, and decreasing referrals for discipline to the principal's office have sometimes seemed to be enough. There is a tendency to seriously neglect fundamental subject matter, and substantial evidence suggests that students may actually receive less instruction when schools provide them with specially-designed programmes to meet their particular learning needs (Allington & Johnston, 1986; Haynes & Jenkins, 1986).

The conventional approaches to providing for student diversity often contribute to children's learning problems. One such problem has been characterized as the 'Matthew effect' (Stanovich, 1984). Students who show limited progress in the early phases of instruction in basic subjects, such as reading, tend to show progressive learning difficulties over succeeding years. It has been estimated, for example, that the lowest achieving students in the middle elementary grades may be reading only one tenth as many words per day in school as students of the same age who are in a highly-skilled reading group (Reynolds, 1989).

The Matthew effect is also reflected in research into teacher expectations. For example, it has been found that teachers tend to give less feedback to students with special learning needs, question them less often or wait less time for them to answer (Cooper, 1983). Differences in educational practice such as these work to the disadvantage of selected groups of students, and have contributed to—rather than ameliorated—the problem of school failure for an alarming number of students.

Thus, in attempting to provide equality of educational opportunity without ensuring equal access to a common curriculum, inequity is perpetuated in a more subtle form. Schools cannot address the equity issue simply by establishing special programmes for students. The practice of compensating for learner differences by making schooling success easier for selected students through differential standards, cannot be accepted as an indicator of educational equity.

If all students are to successfully complete a 'basic' education through equal access to a common curriculum, the way in which schools respond to the diversity of student needs must undergo major conceptual and structural change. Some stu-

dents, for example, require more time and a high level of instructional support to achieve mastery of the common curriculum, and others require less time and little direct instruction. Consequently, achieving the goal of equity in educational outcomes for all children, including those with special educational needs, requires a shift from a fixed to an adaptable system which will deliver equity in the 'opportunity to learn' for every student.

Prospects for improvement

Findings from recent research, along with the practical knowledge gained from implementing innovative programmes in schools, contributes significantly to our current understanding of what constitutes effective teaching and how student learning can be enhanced. These findings suggest alternative approaches to delivering instruction and related support services which are substantially superior to traditional practices. Based on the wealth of findings from the past two decades of research on 'effectiveness', it is possible to imagine many varieties of experimental programme which would enhance the capability of schools to more effectively address student diversity and equity in student learning outcomes (see: Ainscow, 1991; Hegarty, 1993; Wang, Reynolds & Walberg, 1987/91).

Although a number of innovative practices and programmes are in operation and can be replicated or extended, there is very little evidence of the systematic application of the results and findings of the past two decades of research on effective teaching and school effectiveness. The need for systematic information which addresses programme design and implementation concerns has been widely expressed by school personnel and policy makers. Presently, there is little information available in a usable form which could assist local schools in selecting programmes and practical strategies for meeting their specific programme improvement and implementation needs.

If widespread, systematic implementation of proven good practice and innovative programme development initiatives is to occur in schools, a knowledge base containing information about what constitutes school effectiveness and the conditions that influence effective implementation will need to be developed. Schools and related social service agencies are presently faced with two demanding tasks. First, schools must surmount the difficulty of obtaining information on the design, implementation requirements and efficacy of innovative programmes and practices. Second, they must specify criteria for making informed decisions on the feasibility and site-specific compatibility of programmes and practices that will best serve the programme improvement and implementation needs of a particular school. Such a data base is sorely lacking.

What helps students learn?

The first priority in seeking improvement in the learning of students, particularly those whose achievements are at the margins, is the improvement of instructional

effectiveness to ensure a basic level of attainment for all children within the common curriculum. Students with special needs, like other students, simply need 'good' or demonstrably effective instruction to enable them to improve their attainment. However, it may be the case that students with special needs require more instruction and in a more intensive form; importantly, they do not need a different kind of instruction. These students need this extra input early in their school careers and then throughout their school years. They also require the most capable teachers.

Wang, Haertel, and Walberg (1993) recently completed a meta-review study on the variables that influence learning. They identified twenty-eight categories of variables that influence learning. Their study revealed that direct influences have by far the greatest effects. These include: students' cognitive abilities, motivation, and behaviour; classroom management, climate, and student/teacher interactions; amount and quality of instruction; and parental encouragement and support of learning at home.

Variables one step removed from learning, which include school culture, teacher/administrator decision-making, community influences and the peer group outside school, have a relatively moderate influence. The variables which are far removed from the learning setting have the least influence, even though many policy makers are currently preoccupied with educational restructuring at remote organizational levels. These include: school and district demographics; state-level policies; and school policies.

Table 1 provides examples of the variables included in the twenty-eight categories.

TABLE 1. Twenty-eight categories of influence on school learning.

Category/sub-category	Illustrative variable
Student aptitude includes: gender; academic history; and a variety of social, behavioural, motivational, cognitive, and affective characteristics.	
1. Meta-cognitive processes	Comprehension monitoring (planning and monitoring effectiveness of attempted actions and outcomes; testing, revising, and evaluating learning strategies)
2. Cognitive processes	Level of specific academic knowledge in subject area instructed
3. Social and behavioural attributes	Positive, non-disruptive behaviour
4. Motivational and affective attributes	Attitude towards subject matter instructed
5. Psychomotor skills	Psychomotor skills specific to area instructed
6. Student demographics	Gender and socio-economic status
Classroom instruction and climate includes: classroom routines and practices; characteristics of instruction as delivered; classroom management; monitoring of student progress; quality and quantity of instruction provided; student/teacher interactions; and classroom atmosphere.	
7. Classroom management	Group alerting (teacher uses questioning/recitation strategies which maintain active participation by all students)

Category/sub-category	Illustrative variable
8. Student and teacher	Student responds positively to questions/social interactions from teacher and other students
9. Quantity of instruction	Time on task (amount of time students are actively engaged in learning)
10. Classroom climate	Cohesiveness (class members are friends, sharing common interests and values and emphasizing co-operative goals)
11. Student and teacher	Frequent calls for extended, substantive oral and written response (not one-word answers)
12. Classroom assessment	Use of assessment as a frequent, integral component of instruction
13. Classroom instruction	Use of clear and organized direct instruction
14. Classroom implementation	Establishing efficient classroom routines, support and communicating rules and procedures
Context includes: community demographics; peer culture; parental support and involvement; and the amount of time students spend out of class on activities such as television viewing, leisure reading, and homework.	
15. Home environment/parental support	Parental involvement in ensuring completion of homework
16. Peer group	Level of peers' academic aspirations
17. Community influences	Socio-economic level of community
18. Out-of-class time	Student participation in clubs and extra curricular school activities
Programme design refers to the physical and organizational arrangements for instructional delivery, and includes: strategies specified by the curriculum and characteristics of instructional materials.	
19. Curriculum design	Instructional materials employ advance organizers
20. Programme demographics	Size of instructional group (whole class, small group, one-to-one instruction)
21. Curriculum and instruction	Alignment of goals, content, instruction, student assignments, and evaluation
School organization refers to culture, climate, policies and practices, and includes: demographics of the student body; whether the school is public or private; funding for categorical programmes, school-level decision-making variables; and school-level policies and practices.	
22. School culture	School-wide emphasis on and recognition of achievement
23. Teacher/administrator	Principal actively concerned with instructional decision-making programme
24. Parental involvement policy	Parental involvement in improvement and operation of instructional programmes
25. School demographics	Size of school
26. School policies	Explicit school-wide discipline policy

Category/sub-category	Illustrative variable
<i>State and district characteristics refers to: governance and administration; state curriculum and textbook policies; testing and graduation requirements; teacher licensure; provisions in teacher contracts; and district-level administrative and fiscal variables.</i>	
27. State-level policies	Teacher licensure requirements
28. District demographics	School district size
Source: Wang, Haertel & Walberg, 1993, p. 74-79.	

Table 2 lists twenty variables from across the twenty-eight broad categories that are considered to be most powerful in influencing the learning of children in elementary and secondary schools (Reynolds, Wang & Walberg, 1992). The first eleven items are principles of instruction, the next three reflect contextual considerations (all of them involving parental involvement), and the final six represent characteristics of students which relate to learning.

TABLE 2. Variables most important for the learning of children as rated by a twelve-member panel of experts.

Category/sub-category	Illustrative variable
Instruction	Time on task (student time engaged actively in learning)
	Time spent in direct instruction on basic skills in reading
	Time spent in direct instruction on basic skills in mathematics
	Frequent feedback provided to students about their performance
	Comprehension monitoring by the teacher (planning; monitoring effectiveness of actions; testing, revising and evaluating learning strategies)
	Explicit promotion of student self-responsibility and effective meta-cognitive learning strategies
	Use of clear, organized, and direct instruction
	Setting and maintenance of clear expectations of content mastery
	Appropriate reaction by teacher to correct and incorrect answers
	Appropriate task difficulty (students are challenged)
	Safe, orderly school climate
Out-of-school contextual	Parental expression of affection to children
	Parental interest in student's schoolwork
	Parental expectation for academic success
Student characteristics	Use of self-regulation and meta-cognitive strategies
	Level of reading comprehension
	Attitude towards school
	Attitude towards teachers
	Motivation for continued learning
	Level of general academic knowledge

Source: Reynolds, Wang & Walberg, 1992, p. 6-10, 33.

Topping the list is time spent 'on task' or student time spent actively engaged in learning. Time is the most ubiquitous factor observed in research on learning. To learn well, students must spend time actively seeking to learn. This means that parents and teachers must somehow cause children to commit time to learning. It

helps enormously, of course, if other conditions favourable to learning are also applied consistently. We do not currently manage time well or carefully enough. Haynes and Jenkins (1986), for example, showed that students who go to special education resource rooms on a part-time basis for 'special' instruction or other remedial intervention, often end up with no more time on task in subjects in which they were intended to receive extra attention than if they had stayed full time in their regular classes. Allington and McGill-Franzen (1989) reported a similar finding.

Imagine a situation in which psychologists measure the time that students spend actively in learning rather than giving intelligence quotient (IQ) tests, and in which they consult with parents and teachers on improved use of time by children. Also imagine that teachers have learnt to manage classroom situations in partnership with teacher specialists who have come out of their separate enclaves. The specialists offer intensive individualized or small-group instruction to the students most needing direct instruction in basic skills. Extending that scenario and moving down the list of variables shown in Table 2, one can imagine teachers—working in small teams—who provide frequent individual and group feedback to students on their classroom performance, check each student for comprehension on elements of the curriculum, and explicitly promote meta-cognitive learning strategies.

Our survey study (Reynolds, Wang & Walberg, 1992) shows that teachers of advantaged, disadvantaged, and children with special educational needs all agree that the principles listed in Table 2 are important in enhancing student learning. There is not a different set of principles for the instruction of students from economically disadvantaged homes, migrant children or special education students. Undoubtedly, adherence to the basic principles of effective education which allow all children the opportunity to achieve within the common curriculum is especially important for students who have not learned well in the past. Yet these principles have not been followed in special education.

Research and the expert opinions of education professionals clearly show that the diagnosis of learning problems could be much improved through close attention to the same variables stressed here for instructional improvement. Individual students, for example, might be studied to see how well they use time, how capable they are in self-management skills or in the use of meta-cognitive strategies, how orderly they are in classroom situations, how supportive their parents are in school-related affairs, and so on. All these conditions can be influenced by teachers, administrators and policy makers.

As we move towards the integration of children with special needs in mainstream classroom settings, and as teachers and specialists of all kinds are brought together for team-based delivery, these basic principles of practice for providing equal opportunity to learn for all students should inform the development of our work. These principles of learning can be reinforced for application at home through work with parents. Schools with a large number of students living in high-risk circumstances need many kinds of help, but few improvements in children's

learning will occur until there is rigorous application of the important principles of effective instruction and learning in these schools.

Conclusion: implications for implementation

Achieving the goal of equity in educational outcomes will require a major shift in our definitions of educational equity. A reconsideration of the way in which we think about differences among students, how we view the purpose of elementary and secondary education, and the way in which we choose to organize schools, is fundamental to achieving this conceptual shift. If schooling success is recognized as possible for everyone through the correct approaches to teaching, the major task for schools is to create learning environments which uphold a standard of equity in educational outcomes for all students. The starting point should be the identification of practices which deny equal access to the curriculum and to recognize the practices which facilitate access.

The research on effective practice discussed in this paper provides evidence of a rich knowledge base on how schools can implement new and effective approaches to meeting the learning needs of the increasingly diverse student populations they are challenged to serve. One premise is that schooling success can be nurtured through a delivery standard which allows every student access to the common curriculum, while incorporating advances in theory and research on effective practice. Rather than attempting to identify a general underlying 'deficit' in students who require additional instructional support, effective programmes for children with special needs should focus on curriculum adaptations to ensure mastery of curriculum content. Provision of equality of opportunity for educational success can be characterized, therefore, in terms of the use of school time, the quality of instruction, the content of the instruction and instructional grouping practices.

Whether student diversity is addressed through the adoption of innovative instructional approaches or through some organizational restructuring approach, one principle should remain paramount: all students can achieve the goal of basic education if properly supported. If students cannot learn a given set of programme objectives, for whatever reason, then they should be given the additional time and instructional support needed to enable them to do so.

Admittedly, the implementation of programmes which promote educational equity and accountability is complicated by the many programmatic, administrative, attitudinal and fiscal barriers which will undoubtedly continue to plague schools. However, the past two decades of experience in the successful implementation of innovative approaches to instructional accommodation have shown that many of the barriers can be removed. There is no lack of knowledge about what to do or how to do it. The central issue in implementing the vision of educational equity as discussed in this paper is how to tie together resources (for example, teacher expertise, curricular accommodations, administrative and organizational support for programme implementation) and outcomes in ways that simultane-

ously achieve goals for equity and accountability. We will need to use the best of what we currently know about effective instruction and effective schooling. The challenge is to distribute school resources in such a way that extra resources can be devoted to facilitate the development of students who have the most difficulty, while providing all students with the best possible opportunities to succeed in learning.

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ORGANIZATION OF SCHOOLING: ACHIEVING ACCESS AND QUALITY THROUGH INCLUSION

Gordon Porter

Introduction

The debate and discussion concerning the education of special needs students is very much alive among educators in Canada. Old methods and organizational patterns are under increasing pressure to accommodate demands for more integration, equality, equity and inclusion. The Canadian legal system and policy framework increasingly encourages, and in many cases requires, the instruction of students with special needs in mainstream school classrooms alongside their non-disabled peers (Province of New Brunswick, 1986; Porter & Richler, 1990).

This discussion of organizational issues related to the schooling of students with special needs is based on the author's experience with this inclusionary model in Canada.

Context

In Canada and the United States, the organization of schooling is shaped at the province or state level, where legislation and goals are developed and the frame-

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work for the policy, organizational structure and financing of education are established. This mandate is passed to a 'district', meaning a workable cluster of schools with some threads of mutual interest—most often based on sense of community or geographical area. The Canadian province of New Brunswick, where I work, has school districts organized on the basis of both geography and language. There are eighteen school districts—twelve English and six French—ranging in size from 3,000 to 15,000 students.

School District 12, in which I work, has fourteen schools and approximately 5,000 students spread over an area of 7,200 square kilometers. In the small towns and villages of the district, it is usually quite clear what the 'community' or 'neighbourhood' school for each student should be. Some urban school districts in Canada serve 90,000 to 100,000 students and, in these districts, the neighbourhood school is not quite as easily identified.

According to the policy of our province and our school district, full inclusion of all students is the starting point for educational programming (Province of New Brunswick, 1986; School District 12, 1985). The implication of this policy is that all children, including those with the most severe disabilities, should enter school with an assured right to placement in the regular classroom. The provision of other alternatives may occasionally be necessary, but only when every effort has been made to make the regular classroom situation feasible and when the alternatives are clearly in a student's best interests. As a result, most students with special needs or disabilities attend the school they would attend if they were not disabled and are placed in a mainstream class with their age peers.

The key factors in translating this policy into practice are discussed below. These generally affect provision at either the provincial/state level or the district/school level.

Provincial factors

PHILOSOPHY

First, an inclusive approach requires an organizational philosophy which is committed to the improvement of strategies, programmes and the use of available resources. The issue is not seen in terms of 'defective students' (Skrtic, 1991a) and how their disabilities might be cured, but in terms of how we can improve our practices as professional educators.

FUNDING

All educational funding in New Brunswick comes directly from the provincial government and there is no local taxation for educational purposes. This approach was implemented twenty-five years ago to achieve fiscal equity throughout the province. The Ministry of Education funds 'special education' or 'student services' by providing a per-pupil grant based on the total student population of the district.

For example, with 5,000 students and a grant of \$300 per student, the district has \$1.5 million to spend on special services.

The use of this approach has several advantages. First, it eliminates the need to justify funding based on the disability of individual students. There is therefore less of a focus on disability, and a greater focus on support services to teachers and all students with special needs. Second, it does not encourage and reward designation of disability. It assumes that every school, and thus every district, will need a certain level of support service provision simply because the school serves a heterogeneous population of students.

District factors

An additional benefit of this funding approach is that it stimulates responsibility and accountability within both the school and the district. Responsible administrators must be accountable for the effective allocation of resources and must constantly seek better ways of meeting needs within the available funding. Administrative leadership is required in the development of practices and programme implementation strategies. It also requires visionary leadership in overall programme and policy development. With this leadership, a district can establish the basis for an organizational culture based on collaboration and problem solving.

VISIONARY LEADERSHIP: PROGRAMME AND POLICY

Administrators with general responsibilities, as well as those who work in the student services area, must articulate a clear and coherent vision for the educational programme of the district. This must be communicated to teachers and other members of the staff, parents, students and the community. Developing a statement of beliefs regarding the education of exceptional students which is shared by those in positions of authority and leadership in the district is an essential step in developing cohesion in the policy and programme delivery. The development of policies and programmes, and their subsequent implementation, will be more effectively accomplished if this exists.

In many parts of Canada and the United States, the expansion of special education has resulted in the creation of parallel systems for the administration and delivery of mainstream and special education services (Skrtec, 1991*b*). Many jurisdictions, with the most mature and comprehensive special education services, have evolved to the point where the mainstream and special education systems exist separately and relate to each other only in the most theoretical way. The development of a parallel special education system has been harmful; not only because it excludes exceptional students and prevents their contact with non-disabled peers, but also because of the effect it has on the mainstream education system. A school system which hands over all students with learning problems and disabilities to a

separate education structure undermines its ability to be a holistic unit serving all students (Porter, 1986).

The pervasive development of dual systems has led to repeated calls for reform which can resolve the negative effects of this organizational 'disjointedness' (Stainback & Stainback, 1984; Will, 1986; Reynolds, Wang, Walburg; 1987; Gartner & Lipsky, 1987). This disjointedness has not occurred in District 12. In part, this may be attributed to the 'primitive' level of development of the typical array of programmes and services characteristic of special education in North America during the last several decades (Porter & Richler, 1990). 'Special education' in School District 12 is now known as 'student services', and the focus is on supporting the mainstream school programme—that is, the classroom teacher, the school principal and others—in achieving the goal of inclusive education.

It is now recognized that learning problems are contextual. They exist within the context of the classroom, where the curriculum design and the instructional strategies employed by the teacher influence the degree to which exceptional students can be served effectively. A commitment to integrated or inclusionary education means that teachers, schools and the community attempt to resolve problems in a way that respects the integrity of the school as an organization, and does not put the enrolment of the student with a disability at risk.

Traditional approaches to special education encourage the classroom teacher to refer difficulties to experts who diagnose, prescribe and invariably provide alternative instruction for the student (Little, 1985). The message inherent in this approach is that mainstream teachers are not qualified or competent enough to provide education for a student with a significant learning problem.

Fundamental to this new approach in educating exceptional students is the understanding that the principal and the school staff will accept responsibility for the progress of all students (Perner, 1991). It follows that the classroom teacher must accept responsibility for the educational progress of all students in the class. Research shows clearly that teachers' attitudes and expectations have a significant impact on a student's self-concept and success (Purkey, 1984).

An inclusionary programme requires a collaborative and consultation-based service delivery approach to replace the traditional 'student assessment → prescription → specialized instruction' model. The classroom teacher must believe that exceptional students belong in mainstream education and have confidence that they will learn in that situation. These ideas are illustrated in Table 1.

TABLE 1. Alternative perspectives on special education practice.

Traditional approach	Inclusionary approach
Focus on student	Focus on classroom
Assessment of student by specialist	Examine teaching/learning factors
Diagnostic/prescriptive outcomes	Collaborative problem-solving
Student programme	Strategies for teacher(s)
Placement in appropriate programme	Adaptive and supportive regular classroom environment

ADMINISTRATIVE LEADERSHIP: PRACTICES AND STRATEGIES

The administrative and co-ordinating functions that a district can bring to the allocation of resources provide a distinct advantage for several reasons. This way of working encourages district accountability and leadership in the educational enterprise. District leaders are experienced administrators who can articulate the philosophy and policy goals of the programme and help solve problems. Programme leadership is one of the essential factors in achieving an inclusive educational programme.

A district administrative structure also allows some adjustment to the resource allocation for individual schools. While per-student grants may meet the needs of 5,000 students taken as a whole, this approach may miss the mark when it is arbitrarily applied to schools ranging in size from 70 students to 600 students. This is particularly true when the situations change from year to year and students change schools three or four times during their school careers. Thus, the provision of additional support in a specific school during one year may be followed in the next year by the need to move some of the support to another school.

DISTRICT-BASED TEAMS

An important component of the district organizational structure is the 'district-based student services team'. Competent district-based educators, acting as collaborative consultants, can provide constructive leadership and support for principals, teachers and other staff. They can also facilitate access to additional resources and have an important role in monitoring and improving programmes. District-level consultants and specialists such as psychologists, speech/language pathologists and those knowledgeable in specific areas of disability are required in many situations. These personnel are often in short supply, so active recruitment of and support for these personnel is needed.

REGIONAL SERVICE SHARING

Many districts share specialized services with their neighbouring districts, often owing to such factors as size, low incidence of need and budget restrictions. This can be a very beneficial arrangement, in that it often enables a district to provide a service to schools and students which it might otherwise be unable to offer. This is especially true of services for students with the low-incidence disabilities of visual impairment, hearing impairment and severe learning disabilities. Specialists provide consultation to school districts and itinerant teachers are allocated to those districts depending on the identified need and available resources.

A number of community agencies and services may act co-operatively with a school district covering several areas of provision. For example, pre-school and early intervention programmes play an important part in service provision to young children with disabilities. Districts can co-operate with community agencies in providing these services, as well as in areas such as vocational and job placement

programmes. These agencies can assist in the planning and actual transfer of students from school to work. This form of co-operation and sharing of experience and expertise is invaluable.

Organization of school support

A NEW ROLE FOR THE SPECIAL EDUCATOR

In developing this new approach to the education of children with special needs, a significant role change was experienced by school-based special education staff (Porter, 1991). Special class teachers and resource teachers were re-classified as methods and resource teachers (M & R teachers). The M & R teacher acts as a collaborative consultant to the mainstream class teacher. The M & R teacher is responsible for assisting the classroom teacher in developing strategies and activities to support the inclusion of exceptional students in the mainstream class. Methods and resource teachers undertake a variety of activities, but all are designed to help teachers solve problems and work out the best alternatives for instruction. The M & R teacher's functions include: programme planning and development; programme implementation; assessment and prescriptive services; programme monitoring; communication and liaison; and direct instruction.

It is essential that M & R teachers are not seen as experts who should take responsibility for any difficulties experienced by the mainstream teacher. Instead, they must be seen as individuals who can assist the teacher in finding workable solutions to problems that occur in the classroom. Experience in most districts indicates that M & R teachers who have extensive classroom teaching experience and are regarded by their peers as competent classroom teachers, have the greatest success in this role (Porter, 1991). In response to a survey, most of our M & R teachers stated that having mainstream class teaching experience was essential to their credibility with other teachers. It is also necessary for the M & R teacher to have specific knowledge relevant to the education of exceptional students.

One full-time M & R teacher is assigned for every 150 to 200 students enrolled in a school. This represents a modest increase in the number of staff assigned to M & R positions over the last eight years. Additional staff may be assigned to a school if an unusual number of students with significant needs are enrolled there in a given school year. In most cases, however, the need for more support can be satisfied by allocating additional teacher assistant hours—which is a simpler and more cost-effective approach.

DESIRED QUALITIES AND SKILLS OF METHODS AND RESOURCE (M & R) TEACHERS

Since the work of the M & R teacher is highly varied, involving work with students, teachers, administrators and parents, the need to be flexible and responsive

is evident. Although M & R teachers have daily schedules, they must always be prepared to find time for unexpected crises and problems.

Methods and resource teachers must be able to lead school staff in developing positive expectations of students with disabilities. They must have confidence in teachers, ensuring that those who have previously not taught students with special needs can and will respond positively to the challenge. They must have the persistence to keep digging for strategies to assist teachers in helping their students. Above all, M & R teachers must have a positive and optimistic outlook.

A unique demand on the M & R teacher is the regular and intensive teamwork required with classroom teachers who may have limited experience sharing responsibility and decision-making in their work. M & R teachers have identified organizational skills, communication skills and a determination to solve difficult problems as prerequisites for a competent M & R teacher. If a M & R teacher has these qualities, additional skills such as those which aid in facilitating meetings, completing assessments, writing individualized programmes, and acquiring curriculum knowledge can be developed through training and experience. Thus, a commitment to personal development and self improvement becomes a critical quality for M & R teachers.

Staff development to support inclusive education

ONGOING TRAINING OF M & R TEACHERS

All methods and resource teachers attend bi-monthly afternoon training sessions. Several times each term, the sessions are extended to a full day. Sessions include presentations from special resource workers, discussion of issues of topical concern or policies and implementation strategies. M & R teachers may also explore solutions to problems and concerns that are common to their work in district schools (Porter & Collicott, 1992). Methods and resource teachers report that the most significant outcome of this process is the development of a positive outlook towards change; in particular, towards the creation and support for future change in school practices. It is also important to note that M & R teachers take a leading role in training mainstream class teachers in strategies to accommodate students with special needs.

CLASSROOM TEACHERS

In New Brunswick, the classroom teacher is considered the primary resource in instructing exceptional students. This requires teachers to continually refine existing knowledge and skills, as well as to develop new skills. Therefore, staff development at the school and district level is critical to the development of successful integrated educational practices.

In my school district, a needs assessment was conducted with teachers to identify training priorities. Multi-level instruction, co-operative learning, and

classroom and student management were identified as primary needs. Student service personnel also identified collaborative problem-solving and the development of peer support groups and peer tutoring skills as priorities.

A long-term plan to facilitate staff development and professional improvement in these areas was seen as critical, since a substantial change in traditional teaching practices was required to meet the educational needs of exceptional students.

The type of staff development, school-based problem-solving and skill acquisition described above necessitates a change in the way these areas of work have traditionally been approached in schools. Staff development activities must be organized and conducted to involve teachers fully in the various steps of the process (Fullan, 1991a). Collaboration must replace isolation and competition. The school environment must empower teachers by helping them to see themselves and others as problem-solvers. Barriers between staff members must disappear, leaving a level of trust necessary to gain new knowledge, skills and practices (Skrtic, 1991b).

Other strategies for teacher support

PROBLEM-SOLVING TEAMS

Peer problem-solving teams provide a model of support that is based on the strengths of individual teachers. This process encourages classroom teachers to help their colleagues resolve instructional problems. Schools can use this procedure to secure efficient and effective help, while at the same time keeping the initiative for action firmly in the hands of classroom teachers.

There are several variations of this model (Chalfant, Pysh & Moultrie, 1979; Porter et al., 1991; Porter, 1994), but at its core is a process designed to address teachers' problems using a structured approach which makes the most effective use of time. When a teacher refers a problem to the group, team members generate a range of possible solutions. The teacher is then able to select the options which seem most promising. One or more members of the team may provide follow-up support, if needed. While the model may be varied to meet particular circumstances, it should include most of the following components: an effective and task-oriented chairperson; at least three volunteer teacher team members; teacher choice in selecting alternatives for implementation; an agreement on follow-up and responsibility for monitoring; a follow-up meeting to review progress; and the commitment of the team to persist if required.

Peer problem-solving teams are a valuable tool which can serve to reinforce the emphasis on school-based problem-solving and allow teachers to access direct, practical and positive assistance.

INCLUSIVE CURRICULUM AND INSTRUCTIONAL STRATEGIES

An inclusionary approach to the curriculum is required. This means a common curriculum for all students which provides for multi-level instruction and gives students at all levels opportunities for meaningful involvement in classroom activities. This supports the development of an activity-based curriculum which allows students to 'learn through doing'. An inclusionary curriculum has process and content which will facilitate collaboration between students and teachers to achieve meaningful learning for every student.

Good teaching practices are appropriate to all students, as all students have learning strengths and individual learning styles. This applies to exceptional students as well as others. There is increasing evidence that exceptional students need little in the way of distinct instructional strategies. They may need more time, more practice or an individualized variation of approach, but not a strategy explicitly distinct from that used with other students.

MULTI-LEVEL INSTRUCTION

'Multi-level instruction' (Schulz & Turnbull, 1984) is the name given to a major instructional initiative undertaken in District 12. Multi-level instruction enables a teacher to prepare one main lesson with variations which are responsive to individual student needs (Collicott, 1991). It is an alternative to preparing and teaching a number of different lessons within a single class.

Multi-level instruction involves: identifying the main concepts to be taught in a lesson; determining different methods of presentation to meet the different learning styles of students; determining a variety of ways in which students will be allowed to express their understanding; and developing a means of evaluation which accommodates different ability levels.

The implementation of multi-level instruction has been a major focus of staff development activities since 1989. The main emphasis of the training plan for multi-level instruction has been to provide a staged introduction of the idea to the instructional staff of each school. Initially, individual school principals identified two or three of their teachers who had demonstrated some success with inclusion. Those teachers were typically well respected by other staff members and were willing to form a group whose members would be trained; these teachers would subsequently train the rest of the school staff. Methods and resource teachers, principals, and vice-principals also received training in the basic principles of multi-level instruction.

Each school was subsequently required to develop a plan to provide all staff members with on-going training in multi-level instruction. This was done through small group training of classroom teachers, followed by peer collaboration and coaching to develop and extend these newly-acquired skills. Principals and vice-principals supported the implementation by monitoring the use of this instructional technique through teacher supervision and observation, and by creating opportunities for teachers to share successful strategies during staff meetings.

Conclusion

Michael Fullan, Dean of Education at the University of Toronto and an acknowledged expert on educational change, reform and improvement, has noted that reform in special education 'represents just about all the issues involved in bringing about educational reform.' Complexity and leadership are particularly difficult challenges. Fullan has noted that, 'the solutions to inclusion are not easily achieved. It is complex both in the nature and degree of change required to identify and implement solutions that work. Given what change requires—persistence, co-ordination, follow-up, conflict resolution, and the like—leadership at all levels is required . . . ' (Fullan, 1991*b*).

Organizational support for inclusive education must be in place at the provincial/state level, the regional/school district level, and at the school level. These structures, programmes and policies must deliver the support needed by classroom teachers and their students. We have set out specific ways that this can be done, consistent with an inclusive policy framework. The commitment to equity, as well as access and quality, requires continuing development by building on these approaches. In so doing, we can achieve better results for students with special needs while simultaneously creating more effective schools for all students.

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COMMUNITY-BASED REHABILITATION PROGRAMMES

Brian O'Toole

The present challenge

As the new century approaches, it is perhaps timely to think for a moment about how future historians will characterize this particular period of development. Will the final decade of the twentieth century be said to be the age of reports, slogans and rhetoric, or will it have achieved the establishment of the New World Order? Within the field of special education and rehabilitation, will we be seen somewhat conservatively to have followed our forefathers, or will we have begun to formulate a new model of service delivery?

While the precise numbers and percentages are open to debate, it is clear that a disproportionate number of the world's disabled population lives in developing countries. As long as poverty, malnutrition, war, conflict, ignorance and superstition characterize huge areas of the globe, the numbers of the world's disabled population in developing nations will continue to rise. The great majority of disabled people will live their lives without dignity, in absolute poverty, victimized by the commonly-held beliefs that they are possessed by evil spirits or that their very presence is proof of divine punishment.

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An inadequate response

No nation can morally or practically ignore the problems of so many people. It is becoming increasingly apparent that the present model of rehabilitation, based on institutional care, is helping no more than 2% of those in need (Mendis, 1988; Arnold, 1986; Miles, 1991). Moreover, it is not just a problem for the less wealthy countries. A recent report by the International League of Societies for Persons with Mental Handicap (ILSMH) entitled *Education for all* concludes that mainstream schools throughout the world have excluded disabled children (ILSMH, 1990).

In Guyana, the initial rehabilitation approach was to establish special schools and rehabilitation services centrally, staffed by highly trained personnel and with a view to expanding them progressively as resources increased, until the whole target population was covered. The reality has been very different.

Services have become centred in urban areas which makes them accessible only to a small and privileged segment of the community. Against this background it may be useful to remember that most of the world's population are village people, living in traditional rural communities which have not changed for hundreds of years. As yet, these people remain totally unaware of the slogans and declarations being voiced on their behalf.

The present situation was characterized by Mike Miles who, in 1985, wrote that 'the cries of the oppressed filter through as bloodless statistics . . . while the response trickles back as theoretical programmes' (Miles, 1985).

Governments must respond. However, for practical reasons, more economical approaches will need to be explored to meet the magnitude of the task. A means needs to be found to make rehabilitation and education services relevant and accessible to rural and minority peoples.

The search for an appropriate model of services

One reason for the lack of progress in the field of special education and rehabilitation is that the professional roles which have been adopted in developing countries are inappropriate to the needs of those societies.

Developing countries have been seduced by the 'modernization mirage' which has fostered the illusion that Western skills, knowledge and attitudes should be translated directly to developing peoples (Arbab, 1984). In some cases, the mirage has become so vivid that many civil servants and rehabilitation workers in developing countries insist that Western-style institutions are the solution and that anything else is humiliatingly second rate. Karey's (1985) comment that 'special education in Africa is profoundly European in origin, practice and prejudice, in spite of Africanization', is relevant to much of the developing world.

In our desire to imitate the West we have lost sight of the true magnitude of the problem. The justification for the Western focus is the need to 'maintain standards'. However, for the 98% of families which are presently receiving little or no assistance, the argument concerning 'standards' has no relevance. For them, the

question is whether any significant service will reach them during their lifetime (Mittler & Serpell, 1986). Simple improvements to the existing system are not enough. A fundamental change of direction is necessary if the challenge is to be met.

As the new century approaches, there is a growing realization of the need for a new concept of development. 'Top-down' service delivery is becoming an increasingly discredited model. There is recognition that change will be impossible if the people who are supposed to benefit from development do not actively participate in a relationship with those who wish to promote the development process. One of the basic questions that must now be addressed is how individuals who have traditionally been led by others can be enabled to take charge of their own affairs. Rehabilitation can no longer be seen as a product to be dispensed; rather, rehabilitation should be offered as a process in which all the participants are actively and closely involved (O'Toole, 1990).

The emergence of community-based rehabilitation

The identification of professional expertise is an important first step. There has been an international endorsement of the concept of primary health care which, together with an acceptance that non-professionals (with limited training) can play a key role in meeting needs, has laid the foundation for the emergence of a new philosophy and practice in rehabilitation.

The World Health Organization (WHO) has provided the stimulus for incorporating rehabilitation into primary health care with the publication of a manual, *Training in the community for people with disabilities* (Helander et al., 1989).

The goal of community-based rehabilitation (CBR) is to demystify the rehabilitation process and give responsibility back to the individual, family and community.

Most disabled people live in rural communities; rehabilitation is therefore best undertaken in that environment, with a child's caretakers as the primary 'training agents'. Each family needs to learn what to do to help and they require a system of support and encouragement.

In CBR, a 'local supervisor' is recruited from the community and trained. The local supervisor could be a health worker, teacher, social worker or volunteer and their role is to demonstrate to a member of each family how to undertake a specially-developed training programme. A simplified method of rehabilitation is therefore promoted which, in the WHO scheme, is described in a series of booklets. CBR attempts to use existing organizations and infrastructures for the provision of services. Simple tasks are delegated to auxiliaries or volunteers whose performance is monitored by an intermediate-level supervisor. The basic premise of CBR is that the greatest resource in developing countries for helping disabled people lead lives which are fulfilled and productive, is a well-advised and supported family.

CBR endeavours to involve the community in the planning, implementation and evaluation of the programmes, but there are also links with specialist services to cope with more complex needs. The goal is for rehabilitation to be perceived as part of community development whereby the community seeks to improve itself. Once the community takes on the responsibility for the rehabilitation of their disabled persons, then the process can truly be called community-based rehabilitation.

One decade of experience with CBR

Momm and Konig (1989) observe that rarely in the history of services for disabled persons has an initiative attracted as much unqualified support as CBR. The approach has been adopted and co-sponsored by the World Health Organization (WHO), United Nations Children's Fund (UNICEF), International Labour Organization (ILO), United Nations Educational, Scientific and Cultural Organization (UNESCO), and the United Nations High Commissioner for Refugees (UNHCR) as part of their contribution towards the 'Decade of Disabled Persons' and is supported by a host of non-governmental organizations (NGOs) including Rehab International, World Rehabilitation Fund, the International Committee of the Red Cross, the Swedish International Development Agency (SIDA), and the Norwegian Agency for International Development (NORAD).

The past decade has seen some notable advances in the exploration of these new concepts of service delivery. In addition to the WHO initiatives, there have been a number of other experimental community-based rehabilitation programmes.

The Zimcare programme in Zimbabwe (Mariga, 1986) grew out of the recognition that the existing services were not meeting the country's needs. The fifteen service centres in Zimbabwe employed over 300 staff, yet were caring for only 900 persons. Zimcare recognized that providing more centres was not the solution and began an outreach programme to help disabled persons in their own communities. The Zimcare programme offers a ready-made teaching package with a curriculum of activities for parents to use in their homes.

In Kenya, the 'Family Support Service' was developed by a local self-help group which ran a small school in the capital but also realized the need to move into the rural areas to meet the needs of disabled persons in the community (Arnold, 1986). Parents were taught how to facilitate their child's development. This approach began to reduce the isolation of the disabled people and their families.

Project Projimo in Mexico (Werner, 1986) sprang from the concerns of village health workers that the needs of disabled people in the rural areas were not being met. A major objective of the programme was to give disabled people and their families the necessary understanding and skills to help the disabled people reach their full potential. An excellent manual has been produced, *Disabled Village Children* (Werner, 1987), as a result of a decade's experience.

In the Philippines, a high level of local involvement in the rehabilitation programme was achieved through an effective dialogue with the community leaders and extensive publicity in local communities (Valdez, 1991). The programme expanded into a number of other activities including a 'mini-Olympics', leadership training and cultural programmes.

The 3D Project in Jamaica (Thorburn, 1990) provides integrated community-based services to 600 children of all ages and disabilities. The programme provides early identification of children at risk of delayed development, and offers advice and follow-up through a home-based programme carried out by the parents. This has proved to be an effective programme which has grown and developed by mobilizing resources from the local community.

In the majority of the examples above, the disabled people concerned would have received no help from any other source had the CBR initiatives not taken place.

Despite the very real achievements illustrated by these programmes, there are just as many programmes where the limitations of the CBR approach have been highlighted. Poverty, severe social tensions and sheer exhaustion make parental involvement a challenging proposition both in developing countries (Thorburn, 1990; Miles, 1990) and in industrialized nations, where for parents with little or no money, a disabled child may be only one of their many worries (McConkey, 1986).

The ILO, after reviewing a decade of experience with CBR, has recognized the extreme difficulty of introducing effective CBR programmes that will endure once external inputs have been withdrawn (Momm and Konig, 1989). The ILO conclusion states that it has no example of a really effective CBR programme which could demonstrate its ability to continue using only local resources, once external support has ceased.

The real test of CBR has yet to come. Can CBR expand beyond a relatively small-scale, home-based teaching model into a nation-wide community-care programme? The logistics of organizing and supporting a widely dispersed team of workers need to be examined. What happens when the impetus and structures provided by a new project disappear and the initiative is absorbed into a government system which uses local officials who are not as committed to the CBR approach?

Hopeful steps: CBR in Guyana

An attempt to respond to some of these concerns has been made in the 'Hopeful Steps' CBR programme in Guyana. The programme began eight years ago in two small regions of the country. Today, over 400 people are working to promote the philosophy of CBR in four coastal areas and two interior regions of the country.

AN APPROPRIATE INFRASTRUCTURE

Throughout the world, the role of the school system in meeting the needs of disabled people has yet to be fully explored. Of the fifty-one countries responding to

the international study *Consultation on special education* (Consultation on Special Education, 1988), thirty-four acknowledged that they were providing for no more than 1% of children with special educational needs. Just as there have been radical changes within health services in the movement towards primary health care, so there also needs to be a fundamental change in the philosophy underpinning special education. However, there is still little international experience of CBR provision within an educational context upon which to draw.

During the first five years of the Guyana initiative, the programme was implemented by volunteers from the communities — primarily women from rural areas. In each region, a group of volunteers was recruited and after training, individuals began work with one or two families with disabled children.

The new challenge is how to incorporate CBR into existing governmental provisions to enable coverage to be expanded at an economically viable rate. In collaboration with the Ministry of Education in Guyana, a number of innovations are under way:

- Nursery teachers in one region are being trained in CBR as part of their ongoing programme of workshops. The Ministry also releases the teachers for one session per week to work in the homes of children with disabilities.
- In two regions, the original CBR volunteers have now undergone additional training and are working in teams of five, offering a ten hour module on CBR to 250 nursery and primary school teachers.
- The University of Guyana will shortly be offering a forty-five hour module on CBR which will be part of the initial training of all teachers.
- A three-person CBR team has been created in each of the forty-two villages of the isolated and remote Ruyunni region which is the home to the native Amerindian people of Guyana. These teams, comprising a school teacher, the community health worker and a village leader, are now in the process of conducting a survey of the entire region and are devising rehabilitation programmes for each of the persons identified.

Therefore, a programme that began on a modest scale has now expanded and is forging close links with the existing infrastructure and provisions.

THE NEED FOR ONGOING TRAINING AND SUPPORT

The 'Hopeful Steps' programme recognizes the need for ongoing support and training, even once the initial 120 hours of training has been completed. Early experiences illustrated the danger of thinking that the placing of a disabled child in a mainstream school was enough, highlighting that this is only the beginning of a process. There is a clear need for the ongoing support of the teachers and the other children in the school.

'Hopeful Steps' is also encouraging an examination of what constitutes effective training. A significant element is, understandably, influencing the attitudes and expectations of the parents, as well as nurturing the belief that the child is capable of learning and worth helping.

Adequate, and appropriate, training is therefore a crucial first step. The need for support and supervision is equally essential. For integration to be a viable consideration, particularly in developing countries, we need to examine what support can be offered to the mainstream class teacher in terms of personnel, training and special resources. The 'Hopeful Steps' programme is in the process of developing a video-package to train teachers in simple approaches to assisting the integration process. There is a need to investigate how the whole staff of a school could be prepared for the task of integrating children with special needs into mainstream education. Rather than depending on the skill and initiative of individual teachers, the integration process should be regarded as part of a broad-based programme. The experience from Zimbabwe (Mariga, 1986) and from Gaza (Mashal, 1991) shows how Portage-style services can be offered to several hundred families with children with learning difficulties through mobile teams managed by professional staff from the special schools. Portage is a systematic programme of home teaching, in which parents of pre-school children with special educational needs work with a specialist to teach their children at home.

The key to improved services depends on a more innovative approach to the utilization and preparation of human resources. The 'Hopeful Steps' programme has endeavoured to provide a supportive model of supervision—the goal being to promote the confidence of the home visitor and to develop the family's respect for the volunteer. The role of the supervisor is to help the volunteers, the disabled persons and the families to identify their own needs and then to assist in formulating creative responses to the agreed challenges. In response to this nurturing model, the self-confidence and self-worth of the participants grew as they realized they could contribute something of value to others. Such people then become agents for change, awakening others to their potential and to their rights.

THE ROLE OF PARENTS

Parents obviously have varying degrees of capability, as well as different amounts of time and energy for looking after their children; there will be those for whom assuming a major role is unrealistic, because of unemployment, poverty and/or negative attitudes. However, there are many others, from comparable backgrounds, who are eager to become involved once they have the necessary support, information and guidance. It is important to avoid making more demands on an already overburdened family; the key is to assist in improving the quality of the interaction between parents and children in the time which is available.

In the independent evaluation of the 'Hopeful Steps' programme recently completed by Miles and Pierre (1994), a number of parents mentioned the emotional and psychological support they received from the home visits by CBR agents. The value of CBR may lie as much in the relationship between service agents and family members as in the specifics of the practical intervention which they propose. As a result of the CBR programme parents feel less depressed, more confident and relaxed, and increasingly aware of the child's potential. Their goals

become more long-term but, at the same time, more realistic. Aspirations change from wanting their child to be 'normal' to seeking help in specific problem areas to effect real progress.

Many of the social and emotional needs of parents may be met most effectively by participation in an informal voluntary association involving other parents. 'Hopeful Steps' has been strengthened by the establishment of a local network of families which provide mutual support and assume an advocacy role within the communities. These groups have now created regional CBR committees which have assumed management of the project.

COMMUNITY INVOLVEMENT

Community involvement is repeatedly exhorted in literature about rehabilitation and yet few effective examples are readily available as to how it translates into practice. Co-ordinators of rehabilitation programmes may be qualified in technical skills, but often have no preparation in the organizational, social and political aspects of the work. They need to develop a broader role, helping members of the community to examine their own problems and enabling them to realize that they have within themselves the capacity to meet many of their needs.

RELATIONSHIP BETWEEN CBR AND MORE TRADITIONAL FORMS OF REHABILITATION

In the early days of CBR, the approach was sometimes viewed as an alternative to the institutional model of rehabilitation. Now the two approaches are regarded as complementary. A key element in 'Hopeful Steps' has been the development of community-based resource centres run by the regional CBR committees. The centres provide a valuable training base for both parents and professionals and seven such centres have now been established in Guyana. They provide a link between community workers and professionals, as well as between the disciplines of health care and education. The sustainability and technical quality of the rehabilitation programme may ultimately depend on the intermediate link provided by the centres.

EVALUATION

A qualitative and quantitative evaluation of the programme was conducted. It revealed that a range of significant improvements was seen in the development of the child, as measured by Griffiths and Portage pre- and post-tests. Noticeable changes were seen in the attitudes of the parents towards the child, the community and towards themselves (O'Toole, 1991).

Further evaluation must address broader questions: Does CBR work? If so, how? For whom is the approach most effective? How could CBR work better? What types of parents, with what types of children, benefit from which aspects of

the programme? Such questions are difficult to answer at the present, in part because of the lack of suitable methods for evaluating 'success'. There is a danger in focusing only on what can be readily measured. Qualitative information about feelings of increased hope, improved relationships with others and self-satisfaction is often overlooked. We need to rethink the concept of success and investigate better methods for assessing the quality of life of the child and the family. The process of the intervention needs to be understood, not only the results.

Conclusion

Few CBR programmes have developed beyond small-scale projects to large-scale innovations. Few governments have made any significant commitment to and investment in the development of national CBR services. Most CBR programmes are regarded as 'additional programmes'. Moreover, the attempts that have been made to work within existing infrastructures have often meant the programmes become little more than a minor facet of existing service provision, to which no particular priority is given.

However, despite these limitations, CBR has demonstrated, through several successful examples, what can be achieved. For relatively little money, CBR can create better opportunities for disabled children and engenders in parents a sense that they can play a significant role in the development process. Communities have become more aware of disabled persons in their midst and, at times, have played a major role in planning ways of meeting their needs.

CBR offers a new approach to rehabilitation, policy makers, professionals, planners, community leaders and to the disabled persons themselves.

Progress has been slow and uneven over the first decade of CBR. It is significant, however, that some of the most creative examples of parental-professional collaboration have come from some of the poorest nations. It may be time for the developed world to look towards the developing countries to find innovative approaches to meet the needs of disabled persons. It is quite clear that traditional approaches can do no more than scratch the surface. A radical reappraisal of our respective roles in the rehabilitation and education of disabled persons is required. CBR offers this new approach.

If, however, the vision and courage to tread new paths are lacking, then the danger is that more conferences will be held, more declarations will be written, more slogans devised, and still 98% of the disabled population will remain totally unaware of the international concern being voiced on their behalf.

CASE STUDY: GHANA

Prepared by Ofori Addo

Background

The community-based rehabilitation programme (CBRP) for people with disabilities in Ghana was established in June 1992. Prior to this, the majority of disabled people in Ghana (estimated to be over one million of the country's fifteen million population) were not benefiting from existing services, which included mainly urban-based special schools, poor quality vocational training and very limited opportunities for functional training.

In April 1991, the Ghanaian government invited an inter-agency mission, under the United Nations Inter-regional Programme for People with Disabilities, to advise them on the development of a CBRP for people with disabilities in Ghana. One of the mission's key recommendations was the use of existing governmental structures and other organizations in implementing the CBRP. Those structures included the Ministry of Employment and Social Welfare (including the Department of Social Welfare), the Ministry of Education and the Ghana Education Service (including the Division of Special Education and the College of Education), the Ministry of Health, and associations of disabled people working under an umbrella organization known as the Ghana Federation of the Disabled (FODA).

The CBRP in Ghana has several aims. The CBRP seeks to create awareness and mobilize resources at the community level to better enable parents to help their disabled children to attend school, learn skills and participate productively in family and community life. The CBRP also works to establish links between service providers in health, education, community development and social welfare at district level, to meet the needs of disabled individuals more effectively. A third goal of the CBRP is to strengthen the associations of persons with disabilities to enable them to play a role in the mobilization of the community, the implementation of village-level activities and the management of the CBRP. Last, the CBRP seeks to promote the human rights of persons with disabilities.

Preparation and execution of the CBRP

SELECTION OF PARTICIPATING DISTRICTS

Two districts in each of five targeted regions in the south of the country were selected to take part in the CBRP. Thirteen district social welfare officers, one of whom was a representative of FODA, and eighteen peripatetic teaching specialists were selected to begin the implementation of the programme at the district level.

TRAINING OF DISTRICT SOCIAL WELFARE OFFICERS

In June 1992, a three-month basic training course was held for the district social welfare officers (DSWOs) who were required to introduce the CBRP in the target communities, assist those communities in setting up appropriate structures, train and support local supervisors (volunteers) and collaborate with the peripatetic teachers in monitoring the programme.

TRAINING OF PERIPATETIC TEACHERS

The eighteen peripatetic teachers followed an initial four-week course, later supplemented with a three-week course on CBR-oriented education. The main objectives of the course were:

- to make the teachers multi-disability oriented and to assist mainstream teachers in the inclusion of disabled children in their schools;
- to enable the teachers to assist the local supervisors with home-based training for pre-school infants; and
- to give them monitoring skills to enable them to work with the DSWOs on the monitoring of the programme.

A further one-week course in the orientation of education for children with special educational needs was also provided.

ORIENTATION IN THE TARGET COMMUNITIES

The DSWOs and the peripatetic teachers organized a two-week orientation programme for eighty-four local supervisors, based mainly on the World Health Organization manual, *Training in the community for people with disabilities* (Helander et al., 1989). The local supervisors were expected to identify and assess the needs of people with disabilities and subsequently to support them.

The peripatetic teachers organized a three-day orientation programme for mainstream teachers in target districts to encourage them to accept and include children with special needs in their schools. The course focused on the identification of children with special needs, classroom management and the involvement of parents and communities with the education of children with special needs. Further courses for the personnel involved are being developed and provided, as the CBRP progresses.

Significant lessons from the implementation of the CBRP

COMMUNITY LEVEL

CBR committees have been set up in target districts and some committees are now initiating projects themselves. For example, in the Akatsi district of the Volta region, the community has managed to provide a new school building and the dis-

strict education office is providing teachers for the school. Prior to this, children in this community walked five kilometers to school, which prevented many from attending school at all.

At Adoraba, in the Bechem district, the committee has acquired a piece of land to be used as a playground. The local supervisors intend to construct functional training aids such as parallel bars, ramps and swings which can be used by children with mobility difficulties and other impairments. This will enhance integration between disabled and non-disabled children.

INDIVIDUAL LEVEL

As of March 1994, the CBRP had identified 686 persons with various disabilities. Of these, 451 individuals needed some kind of service, ranging from functional training in activities for daily living to advice on income generation. Eighty-nine were children of school age. Most of these needs are being met within local communities and many individuals with disabilities, their families and community members have expressed satisfaction with the support being provided in this way.

For example, in Atukpai, a ward in James Town of Accra, a 6-year-old girl with speech and learning difficulties was placed in a local primary school. Within a period of two months, the girl started making words like 'ma-ma', 'ba-ba' and so on. Hitherto, she had not been engaged in any effective communication.

In another community, a twelve-year old boy with a severe motor disability is being assisted in his home by teachers while efforts are made to find him an appropriate class in the community school. The boy appears to be highly intelligent, but would require some orientation to settle into an ordinary class.

The disabled persons' organizations, which are mostly located in the national and regional capitals, are presently being encouraged to decentralize their activities and membership drives to the districts. This would enable the organizations to support programmes at the district and community levels and help build confidence among the large number of disabled persons being assisted by the CBRP. Disabled adults could also be mobilized to assist communities in the education of children and also to serve as role models within the communities.

NATIONAL LEVEL

A CBRP advisory committee has been established at the national level. It comprises representatives from the existing government services for disabled people, the Disabled Persons' Organization and the University of Ghana. The committee is responsible for the overall co-ordination of the programme and for ensuring the sustainability of community involvement.

Future plans for the programme include the introduction of CBR to the curriculum of Ghana's School of Social Work and the inclusion of material on the education of children with special needs in pre-service teacher training courses. The CBRP will continue to expand into new districts, building on its successes to date.

Major constraints

One major constraint has been some local supervisors' lack of commitment to the CBRP. The socio-economic conditions in Ghana hinder voluntary work and make it a somewhat delicate issue. There are also misconceptions about the programme on the part of some disabled persons, nongovernmental organizations and professionals. However, with better communication, these difficulties could be overcome.

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TRENDS / CASES

REFLECTIONS ON

TECHNICAL AND VOCATIONAL EDUCATION

FOR THE 1990s AND BEYOND

Hermann Schmidt

Traditional labour market structures

In the course of industrialization, work came to be split into two major types. The first type is typically referred to as the primary labour market, and includes complex jobs requiring formal training which offers prospects for advancement and relative job security. This market is preferred by most people, because those in this labour market are expected to manage situations and contribute creatively to improvement and innovation.

The so-called secondary labour market consists of work requiring no or limited qualifications or training. It offers poor pay and frequent unemployment. It remains unpopular in the eyes of most people, because those in the secondary labour market are expected to carry out instructions correctly, follow procedures accurately, and keep their noses clean.

In spite of changes in the entire work world, the two labour markets have persisted in the minds of most people who have operated the markets and who have prepared people to work in those markets. It is entirely consistent with Frederick Winslow Taylor's concept of scientific management, which has dominated nine decades of industrial work organization and has led to the conviction that, with continuing technical progress, the polarization of competence and skill in the two labour markets would actually increase. That is, the primary labour market would consist of people who are fully educated and thoroughly competent

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in all facets of the work world, whereas the secondary labour market would be occupied by workers who would remain narrowly trained and minimally competent.

The education system has reflected the developments in work organization in that it has been organized to provide two quite different types of schooling. In the first schooling type, those destined to be managers and planners of work have been expected to attend schools that would impart a thorough grounding in general education. In the second schooling type, those destined to satisfy the secondary labour market needs have been expected to attend schools that would train them in specific and narrow skills through vocational education. The pronouncements of political leaders have traditionally supported this distinction, although more than a hundred years ago the founder of the Social Democratic Party in Germany, August Bebel, said in protest: 'General education is the vocational education of those who rule; vocational education is the general education of those who are ruled.'¹

It is no wonder that the status of vocational education in Germany and all industrial societies, and even more in the developing countries, has been low compared with the status of general education. Certainly it is much easier to link the notion of dignity with the work of an academic than with that of an assembly line worker. And although industry has changed tremendously in this century, the superiority of a general over a vocational education in terms of the respect accorded to it, has not been affected, because we are still far from getting rid of that secondary labour market. However, conditions may be changing and it may be that we are now at the edge of developments which could change the traditional work organization and break down the traditional divisions between the two labour markets.

The new labour markets

Wolfgang Lempert of the Max Planck Institute in Berlin has conducted case studies in industries, administrations and commercial sectors that can be viewed as front-runners of technological change.² These sectors reveal a much more varied picture of the labour market, pointing to losers as well as to winners of the rationalization process, who are to be found at both the top and the lower levels of the hierarchy. In the automotive industry, in mechanical engineering and in the chemical industry, Taylorism (the reduction of work tasks to highly specialized, simple, externally controlled, repetitive operations) is no longer regarded as the best way to create surplus value. To the contrary, management in these front-runner establishments frequently tries to exploit the capacities of all the employees. Such a tendency is being facilitated by the imperatives of new technologies.³ In administration and commerce, the imperatives of the market also appear to necessitate a shift in the expectations of employees. Baethge and Oberbeck have come to the following conclusion:

Consequently, individuals working in administration and commerce are recognized increasingly as individuals in the literal sense; their needs, desires, motives and interests are taken

more seriously; communication is intensified; autonomy and responsibility are raised. In sum, nearly all conditions of moral reasoning, action and growth are improved.⁴

Are these changes just a short-term fancy of some researchers, who may impose their ideals on industrial history? I would say no, and industrial developments support such a point of view.

A global perspective in the labour market

Although there is not yet a coherent description of the emerging work world, a few fragments of insight have emerged. The new model of production and labour is based on the notion of a systemic and integrated process (lean schemes, total quality assets). The nearest approximation is that production in the emerging world is no longer to be seen as a sequential process, popularly reflected in the factory; rather, it is all-encompassing and simultaneous, with each facet working in conjunction with all other facets. Mature modern environments find themselves in the midst of a transition from societies in which mechanical technology has determined work organization, to societies in which information and organic systems are beginning to determine work organization. In the old model, work organization was similar to a clock mechanism, while the new model reflects more biological configurations in which the whole is different from the sum of its parts. The new perception is that the individual as a worker has dramatic consequences on the functioning of the entire system, which means that if workers, and I mean ALL workers, are to be effective, they must understand the organization of this whole and know how to play an active role in it.

A global perspective of the individual industrial enterprise is being accompanied by still another global development. Commercial markets are shifting from a local to a global arena, and those companies that want to survive in the global competition of the 1990s are being required to mobilize the creative energies of their whole work-force. This is particularly important for Germans as their country has become one of twelve different nations that joined together in 1993 to form a single-market economy consisting of 320 million people, to form, perhaps, a unified Europe. In 1993 four basic freedoms were realized within the twelve countries: free movement of capital, a service commodity exchange, the freedom for inhabitants to live where they wish, and the freedom to work where they desire.

If companies are to achieve the continuous flow of improvements and innovation (small and large) which will be the touchstone of success in the European and world markets, they must give up some of their old ways and adapt to what Daniel Bell has described as the post-industrial society,⁵ and others have labelled the information society.⁶ In this new society, industrial organization will no longer be characterized so much by commodity production as it is by knowledge and information production and distribution. That is, post-industrial society is based more on the production and distribution of knowledge and information than on the production and distribution of material products.

These developments have enormous implications for the education system, which must continuously attempt to respond; however, it is likely that the education system will never be able to respond adequately to the challenges of new developments in the economy and society. It has been estimated that the education system lags at least five to ten years behind the technological developments of mature modern societies. This lag will never be overcome, because it does not seem possible to anticipate the major technological developments. Consequently, it is impossible to standardize and systematize the teaching of occupational skills in the training system until a technology is regarded as established.⁷ But in order to change traditional structures, the goals of general and vocational education must be reformulated in such a way as to participate in the change process, even to help shape the new perspective and be able to cope with uncertainty. In the following section, we shall explore the capacity of the German vocational education system to respond to the requirements of new developments.

Vocational education in Germany

Vocational education in the Federal Republic of Germany is based on agreements between the government on one side and trade unions and employers on the other, and these are the principal actors in the planning process for vocational education and training. In fact, one of the primary features of the German vocational education system is this intensive partnership. Griffin, in discussing the relationship between trade unions, employers, and vocational schools, proclaims:

These partnerships must be founded on the principle of shared responsibility and investment, along with equal return. Each party must realize a benefit from the partnership, or it cannot thrive. Business has a term for this kind of shared partnership: joint venture.

The term joint venture has special meaning when applied to education. Its purpose is to contribute to economic development by continually raising the education level of the current workforce and planning for future training needs. This requires a partnership that dismisses traditional barriers and puts companies and schools into long-term relationships.⁸

We shall provide a single example of how this relationship plays itself out. In 1978 the employer's organization of the metal industry and the metal workers' union negotiated new goals for the training of skilled workers in the metal industry. Employers and trade unions agreed that the old system of job descriptions and certification requirements was becoming increasingly invalid. They set out to establish a set of principles on which a new system would be based, and they agreed that the skilled worker should be able to:

1. Perform tasks independently;
2. Perform a wide variety of tasks in different work surroundings;
3. Mediate effectively between planning, execution and control processes.⁹

These principles served as the foundation to guide an eight-year period of restructuring of job descriptions and certification requirements. In 1986, the preliminary

work was done. In the process, the thirty-seven metal-engineering occupations that had existed in the Federal Republic were clustered into six new and more general metal-engineering occupations, which were further divided into a total of seventeen different occupational profiles. The Federal Government took the formal step of issuing legal regulations for the revised system. A similar process has taken place in other sectors of the work world, and by 1993 the 600 recognized occupations that had previously (1970) existed had been reduced to 370.

Under these new federal regulations, the company and school curricula of the apprenticeship training programmes were redefined. Previously, the training programme contained a description of rather narrow knowledge and skills to be taught through vocational education and training. In the new framework, more general goals were added, related specifically to the above principles. For example, with regard to the metal-engineering process, the training programme not only included a more general education orientation, but many training aims were directly related to the principles that had guided the whole deliberation process. With regard to the first principle mentioned above, the training programme would be restructured to prepare the neophyte with the ability to work independently, demonstrate self-reliance, and communicate with others. With regard to the third principle, the unions and employers and government agreed that the skills and knowledge defined in this binding regulation are to be mediated so that the learner is capable of competent occupational activity, which includes, especially, independent planning, execution and control.¹⁰ Of course, the regulation takes into account the demands of the occupations concerned, and the skills thus described are to be tested in an examination.

In Germany there are two major mechanisms for becoming a skilled craftsperson. First there is a system of technical vocational and business schools which are full-time vocational education institutions. The fields in which these schools are most popular are commercial occupations and home economics and social care. The second mechanism is known generally as the apprenticeship system, or the dual system of education and training, and because the dual system is by far the most popular mechanism, we shall focus our attention on it.

Youth apprenticeship: a case in point

In 1993 nearly 67% of all graduates who completed the nine-year *Hauptschule*, the ten-year *Realschule*, or the thirteen-year *Gymnasium* in the Federal Republic of Germany moved through a system of vocational education and training we call the dual system, where practical vocational training is given at the work place, while theoretical training and general education are given in vocational training schools. It is a joint venture of private enterprise and the public vocational educational institutions (*Berufsschulen*). The dual system is an extension of public education, monitored by the Chambers of Crafts and Industry, financed by private enterprise and largely executed by the private sector.

During the three years of an apprenticeship, a young person is trained and learns on-the-job three to four days a week, and spends the remaining one or two days in formal public college instruction on theoretical aspects of a chosen occupation. On-the-job training is carried out by certified instructors in accordance with a curriculum defined by the Federal Institute for Vocational Training in co-operation with the employers' organizations and trade unions, and issued by the Federal Ministry of Commerce. Locally, the responsibility for guaranteeing the quality of apprenticeship training rests in the hands of business organizations, i.e. the Chambers of Commerce, Industry and Crafts, the education and training boards of which are tripartite, that is, made up of employers, trade unionists and professional teachers. The Chambers enrol the apprentices and administer the intermediate as well as the final examinations held at the conclusion of the apprenticeship programme.

School leavers from each of the three different general education tracks mentioned above sign up to engage in an apprenticeship for one of the 370 current occupations. During the last two decades, the average starting age for beginning apprenticeship has risen significantly, from about fifteen to eighteen years. This is because a growing number of young people remain in full-time general education or even full-time vocational school before they move on into the dual system. This includes a growing number of young people who have completed the 13-year Gymnasium, which until now has been attended by those wishing to go on to the university. As recently as 1970, over 70 per cent of all apprentices had only finished the Hauptschule, which at that time was only an eight-year schooling programme. Very few young people who had completed the Gymnasium and attained an *Abitur* (A-Level, baccalaureate) qualifying them for university study had engaged in apprenticeship experiences (2 %). This situation has changed radically. Today, approximately one-third of the apprentices have only completed the Hauptschule, approximately 15 % of the 1.7 million apprentices have graduated from the Gymnasium, and one-third of all university students have finished an apprenticeship prior to beginning their university studies. It may be that the tight labour market, with its high unemployment rate during the last decade, has contributed to this phenomenon, but it is clear that those going into the secondary labour market are much more highly trained in general education than ever before. It is also clear that those who go through the university are increasingly drawn from the ranks of the working class, who have actual experience in the work world.

The German system is making genuine progress in its attempt to overcome the old mentality regarding work, and is adopting an orientation that prepares the young to participate in the emerging work world. It is tempting to suggest that other countries might learn from the German model and even attempt to emulate it. We caution against any attempt to adopt any system, but we recommend to discuss and adopt principles when building systems. It is possible for any country to learn from the practices of another, and to consider adaptation of its own system as

a consequence of this inquiry. In our final section, we shall offer a sample of some comparative work that has already occurred.

German vocational education: a comparative assessment

The Dual System has been subject to numerous analyses and comparative studies by foreign economists and educators. One of the most important studies, one that is still of current interest, was conducted by Chris Hayes from the United Kingdom, who writes:

The German system of vocational educational training rests on a consensus about fundamental aims of securing economic success for enterprises and for the nation and for giving status and identity to all citizens. All major partners have clearly defined roles in the system with the objective that every person entering the labour market should be occupationally competent and qualified, either as a skilled worker or as a graduate from higher education.¹¹

Finegold and Soskice, having studied the German dual system, have come to the conclusion that the British should be wary of advocating a German-type division at sixteen between academic education and an employer-based three- or four-year apprenticeship. There is always some risk in employer involvement in training, because the greater the employer involvement (unless restrained by powerful employer organizations and unions like in Germany) the more the apprenticeship will reflect the short-term needs of the employer. They also point out the difficulties of adopting the German system in Britain, including the following:

1. Few UK employers are in a position to run quality three-year apprenticeships;
2. If young people were to move into apprenticeships, it would *de facto* close them off from higher education;
3. The opportunity to reduce class distinctions would not be taken.¹²

In the United States, Paul Osterman, a Massachusetts Institute of Technology labour economist who engaged in a research study of European vocational education and training systems, wrote in an article for *Transatlantic perspectives*:

1. Much is made of the [German] system's capacity for skill-building, but there is a substantial mismatch between the types of occupation in which apprenticeships occur and those in which young people eventually find permanent jobs. Small artisan firms accounted for 40 per cent of the dual system training places in 1980, yet they employed only 17 percent of the labour force. Furthermore, a good deal of training occurs in occupations for which there is little demand and over half of all apprentices leave the firm in which they received training within a year after receiving the dual qualification.
2. The German dual system creates workers who are over-qualified for their initial entry jobs. This phenomenon has helped to ease incorporation of new technology into production.
3. The German system is oriented to a core labour force, whereas in the United States, a significant component of training is aimed at those at the bottom of the labour queue. If we

are unwilling to abandon our commitment to these stigmatized groups, then the difficult question is whether any American programme or system that includes them in large numbers can achieve the kind of usefulness or acceptance that characterizes European efforts. Stated differently, what we want to do, is design an employment system that serves the core labour force and meets the needs of firms, yet is accessible to poor people.¹³

Critics such as Finegold, Soskice and Osterman point out some reasons why the German system may not be entirely appropriate for British, American or other environments. In fact, it has difficulty within its own environment. There is no question that the system has shortcomings, but we feel progress is being made and it deserves some credit for its ability to adjust to emerging conditions in an attempt to cope with the challenges of the future.

In the mid-1980s, while the Germans were formulating the new orientation in vocational education, the French and British were also redeveloping their curricula according to their vocational education systems. But educators in all three countries found, not much to their surprise, that the emerging aims of all three countries were similar. Does this mean that Europeans have a common definition of the skills that will be needed, as well as common training goals? So far, they do not. Instead, there are greatly differing systems of vocational education, of qualification, of training duration, etc. Each country in the European Economic Community has its own system for providing young people with basic skills and for socializing them into the world of work. However, in spite of these historical conditions, we are trying very hard to at least describe our various and differing occupational qualifications in order to make the European labour market more permeable.

Conclusions

European educators are increasingly co-operating in order to organize a system of education and training for an uncertain future. We foresee:

1. Broad, basic vocational education in which language (mother tongue and foreign) and mathematics are fundamental. That is, the separation between general and vocational education from our point of view is becoming obsolete.
2. An involvement of the social partners in formulating the vocational education aims and content; social dialogue and co-determination remain crucial for the acceptance of reforms.
3. The principle of learning by doing will be preferred to learning by listening, because knowing about must be joined by being-able-to-do.
4. The integration of low achievers into the work force through vocational education and training in companies and schools; government must pay for this.
5. The specification of equivalence between vocational education qualifications and general education certificates, thus opening up what is now a dead end in vocational training to build a bridge to higher education.

European experiences demonstrate that we have a chance to enhance the dignity of the individual through qualified work. We believe this can become a reality for all people.

Notes

1. One of the fullest discussions of his orientation toward vocational education is found in A. Babel, *Die Frau und der Socialismus* [Women and socialism], Berlin, Dietz Verlag, 1977.
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