

Discussion paper prepared for the International Forum on inclusion and equity in education – *every learner matters*, Cali, Colombia, 11-13 September 2019

**The UNESCO Salamanca Statement 25 years on
Developing inclusive and equitable education
systems**

Discussion paper

This discussion paper has been prepared by Professor Mel Ainscow as background to the International Forum on Inclusion and Equity in education (Cali, Colombia, 11-13 September 2019). The views and opinions expressed in this document are those of the author and should not be attributed to UNESCO.

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[This discussion paper will serve as a basis for the UNESCO Publication on Salamanca 25 years on, Participants in the Forum are invited to make suggestions as to how the paper can be strengthened]

Introduction

The year 2019 sees the 25th anniversary of the World Conference on Special Needs Education. Co-organized by UNESCO and the Ministry of Education and Science of Spain, and held in the city of Salamanca, it led to the **Salamanca Statement and Framework for Action on Special Needs Education**, arguably the most significant international document that has ever appeared in the field of special education. In so doing, it endorsed the idea of inclusive education, which was to become a major influence in subsequent years.

On the occasion of this Forum, UNESCO will capitalize on its unique convening power to give new impetus to inclusion in the context of the 2030 Agenda for Sustainable Development, by addressing questions such as:

- How can we advance legislation, policies, programs and practices that ensure inclusion and equity in education?
- What actions must governments take to translate principles into practice in order to ensure inclusive learning environments?
- What recommendations can help to foster inclusion and equity in education?

With these questions as the focus, this discussion paper looks at the **past, present** and **future** in relation to the ideas presented in the Salamanca Statement in order to guide the further development of national policies and practices¹. In so doing, it explains the way that confusion regarding what is meant by key terms, such as inclusion and equity, has often made progress difficult. It also shows how more recent international policy documents have helped to bring greater clarity to discussions of these concepts.

Drawing on international research and experiences, the paper concludes with a series of actions that are recommended to guide future developments.

¹ A recent special edition of the *International Journal of Inclusive Education* provides research-based accounts of developments in different parts of the world that have been influenced by the Salamanca Statement. See: <https://www.tandfonline.com/toc/tied20/23/7-8?nav=toCList>

[This discussion paper will be finalised using ideas generated during the Forum and published by UNESCO to inform thinking and practice globally. Participants in the Forum are invited to make suggestions as to how the paper can be strengthened]

1. What has happened so far?

This first section explains the international policy context that has led to the increased emphasis on inclusion and equity in education. In so doing, it describes the crucial contribution of the World Conference on Special Needs Education, held in Salamanca, Spain, on 7-10 June 1994, and summarizes the activities that it stimulated.

Education for All

In considering the impact of Salamanca, it is essential to see it in relation to other international developments. In particular, since 1990, ***the United Nation's Education for All (EFA) movement has worked to make quality basic education available to all learners.***² The EFA Declaration sets out an overall vision, which is about being proactive in identifying the barriers some learners encounter in attempting to access educational opportunities. It also involves the identification of resources available at national and community level, and bringing them to bear on efforts to overcome those barriers.

This vision was reaffirmed by the ***World Education Forum meeting in Dakar, 2000***, held to review the progress made in the previous decade. The Forum led to a greater emphasis on inclusion. It declared that EFA must take particular account of the needs of the poor and the disadvantaged, including working children, remote rural dwellers and nomads, and ethnic and linguistic minorities, children, young people affected by conflict, HIV/AIDS, hunger and poor health, and those with special learning needs.

The participants agreed the ***Dakar Framework for Action*** which confirmed their commitment to achieving Education for All by the year 2015, and identified six key measurable education goals which aimed to meet the learning needs of all children, youth and adults. In addition, the Forum reaffirmed UNESCO's role as the lead organization, with the overall responsibility of coordinating other agencies and organizations in the attempts to achieve these goals.

The Salamanca conference on Special Needs Education

A major impetus for inclusive education was given by the World Conference on Special Needs Education in 1994. More than 300 participants representing 92 governments and 25 international organizations met in Salamanca, Spain, to further the objective of Education for All by considering the fundamental policy shifts required to promote the approach of inclusive education, namely enabling schools to serve all children, particularly those defined as having special educational needs.³ Although the immediate focus of the Salamanca conference was on what was termed special needs education, its conclusion was that:

² http://www.unesco.org/education/pdf/JOMTIE_E.PDF

³ UNESCO (1994) *Final Report: World conference on special needs education: Access and quality*. Paris: UNESCO

Special needs education – an issue of equal concern to countries of the North and of the South – cannot advance in isolation. It has to form part of an overall educational strategy and, indeed, of new social and economic policies. It calls for major reform of the ordinary school.

(p. iii-iv)

The aim, then, is to reform education systems. This can only happen, it is argued, if mainstream schools become capable of educating all children in their local communities. The Salamanca Statement concluded that:

Regular schools with [an] inclusive orientation are the most effective means of combating discriminatory attitudes, creating welcoming communities, building an inclusive society and achieving education for all; moreover, they provide an effective education to the majority of children and improve the efficiency and ultimately the cost-effectiveness of the entire education system.

(p.ix)

This suggests that moves towards inclusive schools can be justified on a number of grounds. There is:

An **educational justification**: the requirement for schools to educate all children together means that they have to develop ways of teaching that respond to individual differences and that therefore benefit all children;

A **social justification**: inclusive schools are intended to change attitudes to difference by educating all children together, and form the basis for a just and non-discriminatory society; and

An **economic justification**: it is likely to be less costly to establish and maintain schools which educate all children together than to set up a complex system of different types of school specializing in particular groups of children.

A question to consider now in relation to these justifications is: *What evidence is there to support these arguments?*

The publication of the Salamanca Statement proposed a major change in policy direction, not least for the education of students with disabilities. It is worth noting, for example, that at that time such students were not dealt with by national education departments in some countries. Rather, they were the responsibility of health or social care ministries in a way that implied that these young people were ineducable.

It was inevitable, therefore, that the Salamanca conference involved disputes about orientation, with representatives of some countries and organizations arguing for the continuation of separate provision for particular groups of students⁴. As a result, the

⁴ See various chapter in 'Inclusive Education Twenty Years After Salamanca', edited by F. Kiuppis and R. S. Hausstätter (2014), New York: Peter Lang.

documentation contains some ambiguities that have subsequently become apparent when used in the field. In particular, the deficit orientation of special education that is sometimes there in the texts has continued to delay progress. There is, therefore, a need to move away from ways of thinking that focus on what certain individual learners lack, towards a focus on the contextual barriers that are limiting the participation and progress of many children.

Despite these difficulties, subsequent years have seen considerable efforts in many countries to move educational policy and practice in a more inclusive direction. Further impetus to this movement was provided in 2008 by the 48th session of the IBE-UNESCO International Conference on Education, with its theme **'Inclusive Education: The Way of the Future'**. The conference, which took place in Geneva, focused on ways of providing education to the hundreds of millions of people around the world with little or no access to learning opportunities.

More than 1,600 participants, including approximately 100 ministers and deputy ministers of education from 153 UNESCO Member States, alongside representatives of 20 intergovernmental organizations, 25 Non-Governmental Organizations (NGOs), foundations and other institutions of civil society, took part in the constructive and challenging debates that took place. The long-term objective was to support UNESCO member states in providing the social and political conditions which every person needs in order to exercise their human right to access, take an active part in, and learn from educational opportunities⁵. During the conference, ministers, government officials and representatives of voluntary organizations discussed the importance of **broadening the concept of inclusion** to reach all children, under the assumption that every learner matters equally and has the right to receive effective educational opportunities. In this way, greater clarity was achieved regarding the ideas introduced as a result of the Salamanca conference.

In adopting a broader view of inclusion as being concerned with all learners, the concern to include children with disabilities remains an essential strand within the international policy agenda. This is stressed in the **United Nations' Convention on the Rights of Persons with Disabilities**⁶, which states: 'The right to inclusive education encompasses a transformation in culture, policy and practice in all educational environments to accommodate the differing requirements and identities of individual students, together with a commitment to remove the barriers that impede that possibility.' It is important to stress, however, that this should be seen as an essential part of an overall strategy for promoting inclusion and equity, not as a separate policy strand.

⁵ Opertti, R., Walker, Z. and Zhang, Y. (2014) Inclusive Education: From targeting groups and schools to achieving quality education as the core of EFA, In L. Florian (Ed.) *The SAGE Handbook of Special Education (2nd Revised Edition)*. London: SAGE.

⁶ United Nations (2008) *Convention on the Rights of Persons with Disabilities*. New York: United Nations

Supporting inclusive developments

Like all major policy changes, progress in relation to inclusion and equity requires an effective strategy for implementation. In particular, it requires new thinking which focuses attention on the *barriers* experienced by some children that lead them to become marginalised as a result of contextual factors, as opposed to the categories a learner may or may not fall into. The implication is that overcoming such barriers is the most important means of development forms of education that are effective for all children. In this way, ***inclusion is a way of achieving the overall improvement of education systems.***

During the period prior to and after the Salamanca conference, a series of resources was developed to support inclusive developments. The most significant of these were:

- **Special Needs in the Classroom.** This resource pack of teacher development materials was developed on behalf of UNESCO through a program of action research carried out by a resource team in eight countries.⁷ In the period following the Salamanca conference the materials were expanded for use throughout the world, with initiatives in over 80 countries. The approaches recommended in the resource pack are consistent with the Salamanca orientation. Specifically, they involve a move away from an integration perspective, which is focused on the placement of individual student, towards an inclusive approach, which is concerned with school reform. Within the project, this shift came about as a result of a realization that the ways in which earlier attempts to develop integrated arrangements had been largely unsuccessful. These attempts to integrate students seen as having special needs into mainstream schools were often based on practices derived from earlier experiences in special provision. Many of these approaches are simply not feasible in primary and secondary schools, particularly in economically poorer countries with their massive classes and scarce resources. Consequently, the resource pack concentrates on finding ways of making lessons relevant to all class members, whatever their characteristics or backgrounds.
- **The Open File on Inclusive Education.** These materials were developed by UNESCO to support policy-makers, managers and administrators in promoting inclusive education within their countries⁸. They offer a means whereby decision-makers in different countries can draw on international experience in guiding their own countries' systems towards inclusion. The users of the Open File are likely to be staff with leadership responsibilities working in national education ministries, local government, district services and resource centers, voluntary organizations, NGOs and so on. The Open File is not primarily concerned with national policy-making, or with classroom practice, although both of these are essential considerations in the development of inclusive education. However, national policy is largely a matter for politicians, while classroom practice and issues of internal

⁷ <https://www.eenet.org.uk/resources/docs/135116e.pdf>

⁸ <https://unesdoc.unesco.org/ark:/48223/pf0000125237>

school development and organization are dealt with effectively in UNESCO's earlier Teacher Education Resource Pack: Special Needs in the Classroom, which is drawn upon throughout the Open File.

- **The Index for Inclusion.** Developed originally for use in England by the Centre for Studies in Inclusive Education⁹, this school self-review instrument has been translated into more than forty languages and used in over thirty-five countries in the Global South and North. It enables schools to draw on the knowledge and views of staff, students, parents/carers, and community representatives about barriers to learning and participation that exist within the existing 'cultures, policies and practices' of schools in order to identify priorities for change. In connecting inclusion with the detail of policy and practice, the Index encourages those who use it to build up their own view of inclusion, related to their experience and values, as they work out what policies and practices they wish to promote or discourage. The Index supports staff in schools in refining their planning processes, so that these involve wider collaboration and participation, and introduce coherence to development.

Whilst these resources were developed over ten years ago, much of their content remains relevant to current concerns.

The years following Salamanca also led to a series of regional initiatives in relation to the theme of inclusion. In Latin America, for example, although accurate data is still scarce, the effect of international commitments and national legislations in favor of educational inclusion of all students has led to a slow but positive advance.¹⁰ In Africa, too, there is evidence of positive developments, although concern has been expressed about the problems of importing ideas about inclusive education from the Global North in ways that fail to take account of indigenous forms of education.¹¹ Since becoming a signatory to the Salamanca Statement and Framework for Action on Special Needs Education (UNESCO 1994), India has seen a significant push towards increased enrolment in schools, and children with disabilities have featured prominently in government documentation.¹² Significant developments have also occurred in the countries of the Pacific region, where inclusive education has been identified as a regional priority by all member nations.¹³ And in Europe, an extensive range of

⁹ <https://www.eenet.org.uk/resources/docs/Index%20English.pdf>

¹⁰ Álvaro Marchesi (2019) Salamanca 1994-2019: there is still a long way to Latin America, *International Journal of Inclusive Education*, 23:7-8, 841-848,

¹¹ Sulochini Pather (2019) Confronting inclusive education in Africa since Salamanca, *International Journal of Inclusive Education*, 23:7-8, 782-795

¹² Nidhi Singal (2019) Challenges and opportunities in efforts towards inclusive education: reflections from India, *International Journal of Inclusive Education*, 23:7-8, 827-840

¹³ [Sharma, U.](#), Armstrong, A. C., Merumeru, L., Simi, J. & Yared, H., 2 Jan 2019, In : [International Journal of Inclusive Education](#). 23, 1, p. 65-78 14

initiatives have been introduced through the European Agency for Special Needs and Inclusive Education.¹⁴

Whilst these encouraging developments from around the world provide an impressive range of ideas to build on, they also reinforce the argument that **context matters**. In other words, promoting inclusion and equity is not a matter of importing practices from elsewhere. Rather, it requires an analysis of the situation in each country in order to identify and address barriers experienced by some learners. At the same time, such an analysis is likely to identify examples of good practice that can be built upon.

¹⁴ See: <https://www.inclusive-education-in-action.org/resources/inclusive-education-learners-disabilities>

2. What is the current situation across the world?

Having traced the many developments that occurred following the Salamanca conference, this second section provides a summary of its more recent impact in relation to the promotion of inclusion and equity globally. In so doing, it recognizes the progress that has been made since 1990, e.g. the number of children, adolescents and youth who are excluded from education fell steadily in the decade following 2000¹⁵.

However, the UNESCO Institute for Statistics data show that this progress has slowed in recent years, leaving some 262 million children and youth still not in school, and more than 617 million children and adolescents not achieving minimum proficiency levels in reading and mathematics¹⁶. Significantly, ***the disadvantaged are least served by quality early childhood care and education***, despite the fact that they benefit most from such interventions. It is also important to note the high rates of student dropout, particularly at the secondary stage, and the challenges experienced by many marginalized groups at the time of transition to higher education¹⁷.

It is necessary, too, to recognize that in a global context of expanding conflict and increasing displacement of people these figures understate the challenge. For example, UNICEF reported that 28 million children were homeless due to conflict in 2016.¹⁸ And, although there has been a 15% decline in the marriage of girls before their 15th birthday, there remain 650 million girls and women alive today who were married before their 18th birthday.

Whilst these challenges are most acute in the developing world, there are similar concerns in many wealthier countries, as noted by the OECD¹⁹ which reports that, across its member countries, almost one of five students do not reach a basic minimum level of skills to function in today's societies. It also states that students from low socio-economic background are twice as likely to be low performers, implying that an individual's social circumstances present obstacles to them achieving their educational potential. All of which has led to a further broadening of the inclusion agenda, leading to the focus on equity, which points to the importance of fairness in relation to educational opportunities.

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¹⁵ UIS Fact Sheet No. 48 | February 2018

¹⁶ UNESCO (2019) Global Education Monitoring Report

¹⁷ UNESCO (2015) Education for All 2000-2015: achievements and challenges

¹⁸ <https://www.dw.com/en/unicef-reports-28-million-children-homeless-globally-due-to-conflict/a-19530645>

¹⁹ OECD (2018), *Education at a Glance 2018: OECD Indicators*, OECD Publishing, Paris.

The year 2016 was particularly important in relation to the legacy of Salamanca. Following the Incheon Declaration agreed at the World Forum on Education in May 2015, it saw the publication by UNESCO of *the Education 2030 Framework for Action*. Building on earlier developments, it emphasizes inclusion and equity as laying the foundations for quality education. It stresses the need to address all forms of exclusion and marginalization, disparities and inequalities in access, participation, and learning processes and outcomes. It also calls for a particular focus on those who have traditionally been excluded from educational opportunities, such as students from the poorest households, ethnic and linguistic minorities, indigenous people, and persons with disabilities. In this way, it is made clear that the agenda of *Education for All has to be about 'all'*.

As the United Nations' specialized agency for education, UNESCO is entrusted to lead and coordinate the Education 2030 Agenda, which is part of a global movement to eradicate poverty through 17 Sustainable Development Goals. Education, essential to achieve all of these goals, has its own dedicated Goal 4, which aims to 'ensure inclusive and equitable quality education and promote lifelong learning opportunities for all'. The Education 2030 Framework for Action provides guidance for the implementation of this ambitious goal and commitments.

Promising developments

The situation across the world in relation to this challenging policy agenda is complex, with some countries making great strides, whilst others continue to have segregated provision of various forms for some groups of learners. Thinking about the development of policies for promoting inclusion and equity, it is encouraging to see the progress made in certain countries. For example:

- For more than 30 years *New Brunswick in Canada* has pioneered the concept of inclusive education through legislation, local authority policies and professional guidelines.²⁰ More recently, New Brunswick adopted Policy 322 on Inclusive Education, the first province-wide policy mandated by the Minister of Education. This policy defines the critical elements of an inclusive education system that supports students in common learning environments and provides supports for teachers. It sets clear requirements for school practice including procedures for the development of personalized learning plans, inclusive graduation, as well as strict guidelines when a variation of the common learning environment may be required.
- *The Italian government* passed a law in 1977 that closed all special schools, units and other non-inclusive provision.²¹ This legislation is still in force and subsequent amendments have further strengthened the inclusive nature of the education system. Not only did this close segregated educational facilities but it removed the possibility of exclusion

²⁰ Gordon L. Porter and Angela Aucoin (2012) Strengthening Schools, Strengthening Inclusion. Online: <http://www2.gnb.ca/content/dam/gnb/Departments/ed/pdf/K12/Inclusion/Inclusion.pdf>

²¹Lauchalan F. & Fadda R. (2012) The 'Italian model' of full inclusion: Origin and current directions. In *What Works in Inclusion?* edited by C. Boyle, K. Topping. Maidenhead: Open University Press.

from school as a corrective sanction. Whilst practice varies from place to place, there is no doubt that the principle of inclusion is widely accepted.

- Having enacted legislation making disability discrimination in education unlawful, **Portugal** has gone much further in enacting an explicit legal framework for the inclusion in education of students with and without disabilities.²² Recent legislation requires that the provision of support for all students be determined, managed and provided at the regular school level, with local multidisciplinary teams responsible for determining what support is necessary to ensure all students (regardless of labels, categorisation or a determination of disability) have access to and the means to participate effectively in education, with a view to their full inclusion in society. It is also significant that Portugal has developed progressive assessment practices to support the achievement of all learners.
- **Finland** is a country which regularly outperforms most other countries in terms of educational outcomes. Its success is partly explained by the progress of the lowest performing quintile of students who take the PISA tests out-performing those in other countries, thus raising the mean scores overall.²³ This has increasingly involved an emphasis on support for vulnerable students within mainstream schools, as opposed to in segregated provision. There is a particular focus on prevention of learning difficulties in Finland, and a high level of resources are directed at this in primary schools. For example, all Finnish schools are assigned specialists to support any students who requires additional help.

In drawing attention to these examples of policy development, it must be stressed that they are not seen as being perfect. Rather, they are countries where there are interesting developments from which to learn. They are also varied in respect to the approach being taken and what they have achieved.

Other global trends

In some countries increasing pressure to improve the rankings of countries on global league tables derived from standardized testing is creating new barriers to progress in relation to inclusion and equity. This involves an increased emphasis on school autonomy and parental choice, and takes a variety of forms.²⁴ The schools involved have different titles, such as charter schools in the USA, free schools in Sweden, academies in England and independent public schools in parts of Australia. Implicit in these independent state funded schools is an assumption that greater autonomy will allow space for the development of organisational arrangements, practices, and forms

²² Alves, I. (2019) International inspiration and national aspirations: inclusive education in Portugal. *International Journal of Inclusive Education* (in press)

²³ Sabel, C., Saxenian, A., Miettinen, R., Kristenson, P. H., & Hautamaki, J. (2011). *Individualized service provision in the new welfare state: Lessons from special education in Finland*. Helsinki: SITRA.

²⁴ Meyland-Smith, D., & Evans, N. (2009) *A guide to school choice reforms*. London: Policy Exchange.

of management and leadership that will be more effective in promoting the learning of all of their students, particularly those from economically disadvantaged and minority backgrounds.

This global policy trend is a matter of considerable debate and there are varied views as to the extent to which it is leading to the desired outcomes. In particular, there is a concern that the development of education systems based on autonomy, coupled with high-stakes accountability and increased competition between schools, will further disadvantage learners from low-income and minority families²⁵. For example, parental choice and competition between schools has widened the gap between desirable schools and less desirable schools in countries as varied as Chile and Sweden.

In relation to these concerns, the OECD reports on the success of certain education systems that rank highly on both measures of quality and equity²⁶. It argues:

The evidence is conclusive: equity in education pays off. The highest performing education systems across OECD countries are those that combine high quality and equity. In such education systems, the vast majority of students can attain high level skills and knowledge that depend on their ability and drive, more than on their socio-economic background.
(page14)

Further encouragement for this view is provided by the recent 'Report Card' prepared for UNICEF by the Innocenti Centre²⁷. It also argues that there is no systematic relationship between country income and indicators of equality in education. For example, it is notable that some of the poorest countries in the comparison, such as Latvia and Lithuania, achieve near-universal access to preschool learning and curb inequality in reading performance among both primary and secondary school students more successfully than countries that have far greater resources. The Report card concludes that Finland, Latvia and Portugal have the most equal education systems.

The implication, then, is that ***it is possible for countries to develop education systems that are both excellent and equitable***. The question is: how can this be achieved?

Useful resources

Looking to the future, UNESCO has developed further resources to support inclusive and equitable educational developments. These include the following

²⁵ Salokangas, M. and Ainscow, M. (2017) *Inside the autonomous school: making sense of a global educational trend*. London: Routledge

²⁶ OECD (2012), *Equity and Quality in Education: Supporting Disadvantaged Students and Schools*, OECD Publishing.

²⁷ UNICEF Office of Research (2018) 'An Unfair Start: Inequality in Children's Education in Rich Countries', Innocenti Report Card 15. UNICEF Office of Research – Innocenti, Florence.

The Guide for Ensuring Inclusion and Equity in Education. This guide offers practical support to member states to help review how well equity and inclusion currently figure in existing policies, decide what actions need to be taken to improve policies, and monitor progress as actions are taken²⁸. An assessment framework is presented to accompany countries in this review exercise based on four key dimensions: concepts, policy statements, structures and systems, and practices.

Drawing on international research and on best practice related to equity and inclusion in education systems, the Guide was developed with the advice and support of a group of international experts, including policy-makers, practitioners, researchers, teacher educators, curriculum developers and representatives of various international agencies. The evidence presented in the Guide allows member states to learn from the progress made by other countries towards more inclusive and equitable education systems. For example:

- How Ghana assesses the inclusiveness of its mainstream schools.
- How Denmark is developing a unifying sense of community by listening to the views of children for better inclusion and equity.
- How students help teachers to innovate in Portugal.

Examples such as these advance the right of every learner to inclusive and equitable education.

This guide is relevant to all countries and educational systems. While targeting improvements in formal education, it recognizes that education occurs in many contexts – in formal, non-formal and informal settings – and across lifetimes. The guide can either be used independently or it can be incorporated into other policy review processes and tools to ensure attention to equity and inclusion.

Reaching Out to All Learners. Those involved in taking this challenging agenda forward may find it useful to use the related resource pack, *'Reaching Out to All Learners'*, developed by the International Bureau of Education-UNESCO.²⁹ Drawing on international research evidence, these materials are intended to influence and support inclusive thinking and practices at all levels of an education system. Consequently, they are designed to be relevant to teachers, school leaders, district level administrators, teacher educators and national policy makers.

The Resource Pack consists of three inter-connected guides:

²⁸ UNESCO (2017) *Ensuring inclusion and equity in education*. Paris: UNESCO

²⁹ Available at: http://www.ibe.unesco.org/sites/default/files/resources/ibe-crp-inclusiveeducation-2016_eng.pdf

Guide 1. Reviewing National Policies - This provides a framework for reviewing national policies in order to create a policy context in which the other two guides can be used effectively to foster more inclusive schools and classrooms.

Guide 2. Leading Inclusive School Development - This supports head teachers and other senior staff in reviewing and developing their schools in order to make all their students feel welcomed and supported in their learning.

Guide 3. Developing Inclusive Classrooms - The aim of this guide is to support teachers in developing more effective ways in engaging all children in their lessons.

The resource pack is intended to be used flexibly in response to contexts that are at different stages of development and where resources vary. With this in mind, it emphasises active learning processes within which those who use the materials are encouraged to work collaboratively, helping one another to review and develop their thinking and practices. Extensive use is made of examples from different parts of the world to encourage the development of new ways to **reach out to all learners**.

Other relevant resources have been made available by the European Agency for Special Needs and Inclusive Education, such as those developed through the Raising the Achievement of all Learners in Inclusive Education project.³⁰ These materials provide a synthesis of country information and findings from the project's practical work. They also discuss the particular challenges of raising achievement faced by participating countries, with reference to both recent literature and project work, and provide recommendations to address these challenges

In addition, the European Agency has worked with UNESCO to produce a collection of case studies in order to support stakeholders (e.g. policy makers, teachers and educators, researchers, development partners, NGOs) in developing and implementing inclusive and equitable education policies, programmes and practices.³¹

³⁰ <https://www.european-agency.org/resources/publications/raising-achievement-all-learners-project-overview>

³¹ <https://www.inclusive-education-in-action.org/>

3. What are the implications for future policy development?

As explained in the first two sections of this paper, significant efforts have been made to promote quality education for all since 1990. However, the reality in many countries does not show significant transformations of educational systems, nor in policies. Therefore, the momentum of reform must be maintained, if not increased, by finding more effective ways of addressing barriers to progress.

Drawing on lessons drawn from the experiences and research summarised so far, this third section points to the actions that are needed in relation to this challenging policy agenda. These recommendations are guided by the idea that ***inclusion and equity should not be seen as separate policies***. Rather, they should be viewed as principles that inform all national policies, particularly those that deal with the curriculum, assessment, supervision, school evaluation, teacher education and budgets. They are, therefore, concerned with change.

Managing change

International research regarding educational change³² suggests that policies for reform should take account of the following assumptions:

- ***Clarity of purpose is essential in order to mobilize widespread support*** – progress requires a shared understanding of the rationale and purposes of the changes that are being introduced
- ***Policy is made at all levels of a national education system, not least at the classroom level*** – this means that strategies for change must seek to influence as many stakeholders as possible
- ***Educational change is technically simple but politically and socially complex*** – therefore, efforts have to be made to convince stakeholders of the value of proposed changes
- ***Evidence is the catalyst for successful change*** – in particular, the knowledge of stakeholders about the current situation must inform planning processes

With all of this in mind, in what follows six recommendations are made as to actions that should be taken to promote inclusion and equity within education systems. It is important to stress that these recommendations do not imply the need for a massive investment of additional resources. Rather, they involve the more effective use of resources that are already there within the system. This means that there are implications for all stakeholders: policy-makers, administrators, teachers, students, families and researchers.

³² Fullan, M. (2007), *The New Meaning of Educational Change*, 4th ed., Teachers College Press, New York, NY.

Recommended actions

Action 1: Establish clear definitions of what is meant by inclusion and equity in education.

In many countries, inclusive education is still thought of as an approach to serving children with disabilities within general education settings. However, internationally it is increasingly seen more broadly as a principle that supports and welcomes diversity amongst all learners. This means that the aim is to **eliminate social exclusion that is a consequence of attitudes and responses to diversity in race, social class, ethnicity, religion, gender and ability**. As such, it starts from the belief that education is a basic human right and the foundation for a more just society.

As explained above, policy is made at all levels of an education system, not least at the school and classroom levels. It must also be noted that the promotion of inclusion and equity is not simply a technical or organizational change. Rather, it is a movement in a clear philosophical direction, requiring a culture of inclusion that permeates the education system.

The creation of such a cultural change requires a shared commitment amongst staff at the national, district and school levels. It is, therefore, crucial that those who need to be involved in this change have a clear sense of what is intended. In particular, the terms 'inclusion' and 'equity' must be clearly defined in ways that will speak to a diverse range of stakeholders. The definitions provided in the UNESCO document, 'A guide for ensuring inclusion and equity in education', described above, are particularly helpful in that they avoid the use of jargon. They are:

- **Inclusion** is a process that helps overcome barriers limiting the presence, participation and achievement of learners.
- **Equity** is about ensuring fairness, where the education of all learners is seen as having equal importance

The central message is therefore simple: **every learner matters and matters equally**. The complexity arises, however, when we try to put this message into practice. This will likely require changes in thinking and practice at every level of an education system: from classroom teachers and others who provide educational experiences directly, through to those responsible for national policy and to the wider community.

Action 2: Use evidence to identify contextual barriers to the participation and progress of learners.

In order to address problems of access and equity in education systems, it is important to know who is included, who is segregated and who is excluded from schooling. It is also essential to understand that **exclusion has many forms and expressions**, such as:

- **Exclusion from having the life prospects needed for learning** - For example: living under conditions inadequate for health and well-being, such as inadequate housing, food, and clothing; living under limited security and safety.
- **Exclusion from entry into a school or an educational program** - For example: unable to pay entrance fees and tuition fees; being outside the eligibility criteria for entry; dressed in ways considered inadmissible by the school.
- **Exclusion from regular and continuing participation in school or an educational programme** - For example: school or program too far to attend regularly; unable to continuously pay for participation; unable to spare time for attending school due to other life demands; school or programme closed down; illness or injuries.
- **Exclusion from meaningful learning experiences** - For example: teaching and learning process not meeting the learning needs of the learner; the language of instruction and learning materials not comprehensible; learner goes through uncomfortable, negative and/or discouraging experiences at school or in the program, e.g. discrimination, prejudice, bullying, violence.
- **Exclusion from a recognition of the learning acquired** - For example: learning acquired in a non-formal programme not recognized for entry to a formal program; learning acquired is not considered admissible for a certification; learning acquired is not considered valid for accessing further learning opportunities.
- **Exclusion from contributing the learning acquired to the development of community and society.** For example: learning acquired is considered to be of little value by society; the school or program attended is seen to have low social status and is disrespected by society; limited work opportunities that correspond to the area of learning acquired, or limited work opportunities in general; discrimination in society on the basis of socially ascribed differences that disregards any learning acquired by the person. ³³

Without an engagement with evidence in relation to all of these forms of exclusion, there can be no accountability. However, when data collection efforts are only focused on particular categories of learner, there is a risk of promoting deficit views of those students who share certain characteristics, or come from similar home backgrounds. This also distracts attention from more fundamental questions, such as: **Why are we failing some learners? What are the barriers experienced by some of our students?**

Engaging with evidence regarding these challenging questions has the potential to stimulate efforts to find more effective ways of promoting the participation and

³³ Addressing exclusion in education: a guide to assessing education systems towards more inclusive and just societies. <https://unesdoc.unesco.org/ark:/48223/pf0000217073>

progress of all learners. Data on contextual factors are therefore needed, including an analysis of policies, practices and facilities, and also attitudes and social relationships.

The views of young people must be sought and valued, particularly those from at-risk groups. Their voices can challenge policy makers and practitioners to find more effective ways of ensuring that all children are included³⁴. Here, it is necessary to recognise that certain groups are particularly vulnerable of being overlooked - such as learners in all kind of disabling situations, those from ethnic or minority backgrounds, and others from low income families. Action plans must take account of all these students and remove barriers to their participation and learning.

With the growing technological capacity to handle large amounts of different types of data, it is increasingly possible to generate information about the many influences that effect the inclusion, segregation and exclusion of students within education systems. Focusing on these factors can help to create the conditions for promoting inclusion and equity.

All of this has important implications for the way countries establish national systems of accountability regarding education. Commenting on this, the 2017/18 Global Monitoring Report argues that lack of accountability risks jeopardizing progress, thus allowing harmful practices to become embedded within education systems³⁵. It goes on to suggest that when public systems do not provide an education of sufficient quality, the marginalized lose out. Therefore, accountability must involve acting when something is going wrong, through policy, legislation and advocacy, including arrangements to protect citizens' rights. The Report concludes that ***there is a need for stronger mechanisms to enshrine and enforce the right to education and hold all governments to account for their commitments.***

Action 3: Ensure that teachers are supported in promoting inclusion and equity.

There is not one single model of what an inclusive school looks like. ***What is common to highly inclusive schools is that they are welcoming and supportive places for all of their students***, not least for those with disabilities and others who experience difficulties.³⁶ There is also strong evidence³⁷ of the potential of approaches that encourage cooperation between students for creating classroom conditions that can both maximise participation, whilst at the same time achieving high standards of learning for all members of a class.³⁷

³⁴ Ainscow, M. and Messiou, K. (2017) Engaging with the views of students to promote inclusion in education. *Journal of Educational Change*, 19 (1), 1-17

³⁵ <https://en.unesco.org/gem-report/report/2017/accountability-education>

³⁶ Dyson, A., Howes, A. and Roberts, B. (2004). What do we really know about inclusive schools? a systematic review of the research evidence. D. Mitchell (ed.), *Special Educational Needs and Inclusive Education: Major Themes in Education*. London, Routledge.

³⁷ Johnson, D.W., Johnson, R.T. & Holubec, E. (1998) *Cooperation in the classroom*. Edina, MN: Interaction Book Company.

Evidence from OECD suggests that ***countries where teachers believe their profession is valued show higher levels of equity in learning outcomes***³⁸. With this in mind, schools need to be reformed and practices need to be improved in ways that will lead teachers to feel supported in responding positively to student diversity – seeing individual differences not as problems to be fixed, but as opportunities for enriching learning. In this way a consideration of difficulties experienced by students can provide an agenda for change and insights as to how such changes might be brought about. This kind of approach is more likely to be successful in contexts where there is a culture of collaboration that encourages and supports problem-solving. Therefore, the development of inclusive practices must involve those within a particular context in working together to address barriers to education experienced by some learners³⁹.

Since UNESCO's 48th International Conference on Education, 'Inclusive Education: The way of the future', there has been a growing interest in reforms of teacher education to ensure that teachers are prepared and supported to meet the participation and learning of all students⁴⁰. This starts with the initial education of teachers and should continue throughout their careers.

As systems become more inclusive, ***professional development is particularly important*** because of the new challenges that face teachers in mainstream schools, who will have to respond to a greater diversity of students. However, understanding how well teachers are prepared for inclusive education, and the role they play in reducing inequalities, needs to take account of regional disparities in teacher qualifications, supply and deployment, and broader issues regarding the quality and content of teacher preparation. These global disparities put different pressures on national systems of teacher education. A model of teacher education that works well in countries where teaching is a high-status occupation with good salaries is less likely to work where there are acute teacher shortages. Special educators, who will find the context and focus of their work changing in major ways, will also need on-going professional development.

Another important implication is that senior staff in schools must provide effective leadership by addressing these challenges in a way that helps to create a supportive climate within which teacher professional learning can take place. While the form and structure of teacher education varies, the common issues and challenges of meeting SDG 4 create an agenda for teacher development at all levels.

³⁸ Schleicher, A. (2015), *Schools for 21st-Century learners: Strong leaders, confident teachers, innovative approaches*, OECD Publishing, Paris, <http://dx.doi.org/10.1787/9789264231191-en>

³⁹ Ainscow, M., Booth, T., Dyson, A., with Farrell, P., Frankham, J., Gallannaugh, F., Howes, A. and Smith, R. (2006) *Improving Schools, Developing Inclusion*. London: Routledge

⁴⁰ Florian, L & Pantic, N (2017) Teacher education for the changing demographics of schooling: Policy, practice and research. In *Teacher Education for the Changing Demographics of Schooling: Inclusive Learning and Educational Equity*. vol. 2, Inclusive Learning and Educational Equity, vol. 2, Springer, pp. 1-5.

Action 4: Design the curriculum and assessment procedures with all learners in mind.

In an education system based on the principles of inclusion and equity, all students are assessed on an on-going basis in relation to their progress through the curriculum. This allows teachers to respond to a wide range of individual learners, bearing in mind that each learner is unique. It means that teachers and other professionals must be well informed about their students' characteristics and attainments, while also assessing broader qualities, such as their capacity for cooperation. However, the ability to identify each student's level of performance is not enough. **Teachers in inclusive systems need to gauge the effectiveness of their teaching for all of their students** and should know what they need to do to enable each student to learn as well as possible.

For assessment activities to enhance the learning of each and every student, formative and summative information that recognises the importance of the inter-relationship of the curriculum, the learner, pedagogy and the community within which learning takes place is needed. Personalization of teaching and learning is therefore crucial. This means that assessment should focus not only on the students' characteristics and attainments, but also on the curriculum and how each student can learn within and beyond it. There is also a need to avoid the use of tests that have biases which may harm disabled people, women, the poor, migrants and descendants of indigenous peoples.⁴¹

Teachers need to have the skills to conduct assessments themselves: to prepare for this, they need on-going professional development. They also need to find ways of working with special educators, psychologists, social workers and medical professionals, where they are available. However, the most important partners are their colleagues, parents and the students themselves, who are positioned to see things from unique points of view and can thus offer differing perspectives on what is needed to help all learners make progress.

Action 5: Structure and manage education systems in ways that will engage all learners.

Movement towards inclusion and equity is likely to require some restructuring of the way education provision is provided within a country. Such changes may be resisted by some of those involved, not least parents who understandably want to do the best for their own children. In particular, parents who have fought to acquire additional support for their children may be concerned that moves towards inclusion may see this disappear.

Dealing with difficulties such as this means that it is essential to have **a shared commitment amongst senior staff at the national, district and school levels**. In particular, they must value differences, invest in collaboration, and commit to providing

⁴¹ <https://www.researchgate.net/publication/318380606>

educational opportunities that are equitable. Therefore, leaders at all levels of an education system have to be prepared to analyse their own situations, identify local barriers and facilitators, and plan an appropriate development process to promote the development of inclusive attitudes and practices.

In some countries, the existence of parallel private and public education systems is likely to limit the impact of policies for promoting inclusion and equity. Meanwhile, as noted above, there is an increasing emphasis in some countries on the idea of school autonomy within policy contexts based on competition and choice. On the other hand, there is evidence that **school-to-school collaboration can strengthen the capacity of individual organizations to respond to learner diversity**.⁴² Specifically, partnerships between schools can help to reduce the polarization of schools, to the particular benefit of those students who are marginalized at the edges of an education system. In addition, there is evidence that when schools seek to develop more collaborative ways of working, this can have an impact on how teachers perceive themselves and their work. Specifically, comparisons of practices in different schools can lead teachers to view underachieving students in a new light. In this way, learners who cannot easily be educated within the school's established routines are not seen as 'having problems', but as challenging teachers to re-examine their practices in order to make them more responsive and flexible.

Local coordination is needed in order to encourage such forms of collaboration. A recent report noted that four of the most successful national education systems - Singapore, Estonia, Finland, and Ontario – each has a coherent 'middle tier', regardless of their differing extents of school autonomy or devolution of decision-making⁴³. In particular, they all had district level structures that offered a consistent view that, to maintain equity as well as excellence, there needs to be an authoritative co-ordinating influence with local accountability.

Leadership at all levels of an education system is a crucial factor in all of this. Particular forms of leadership are known to be effective in promoting inclusion in education⁴⁴. These approaches focus attention on teaching and learning; create strong supportive communities of students, teachers and parents; nurture the understanding of the importance of education amongst families; and foster multi-agency support.

Meanwhile, most countries still have various types of separate special provision for some students, although as local schools become more inclusive, **the need for separate special services should diminish**. Given this diversity of provision, encouraging cooperation between different sectors is important, not least so as to minimize social isolation.

⁴² Muijs, D., Ainscow, M., Chapman, C. and West, M. (2011) *Collaboration and networking in education*. London: Springer

⁴³ <http://sarabubb.com/middle-tier/4594671314>

⁴⁴ Riehl, C.J. (2000) The principal's role in creating inclusive schools for diverse students: a review of normative, empirical, and critical literature on the practice of educational administration. *Review of Educational Research* 70(1), 55-81.

Action 6: Involve communities in the development and implementation of policies for promoting inclusion and equity in education.

In order to foster inclusion and equity in education, governments need to mobilize human and financial resources, some of which may not be under their direct control. Forming partnerships among key stakeholders who can support and own the process of change is therefore essential. These stakeholders include: parents/caregivers; teachers and other education professionals; teacher educators and researchers; national, local and school-level administrators and managers; policy-makers and service providers in other sectors (e.g. health, child protection and social services); civic groups in the community; and members of minority groups that are at risk of exclusion.

The engagement of families is particularly crucial. In some countries, parents and education authorities already cooperate closely in developing community-based programmes for certain groups of learners, such as those who are excluded because of their gender, social status or impairments. A logical next step is for these parents to become involved in supporting change for developing inclusion in schools.⁴⁵

A further pattern that emerges from international research is the way in which greater school autonomy within systems based on competition and choice is reducing connections between schools and their local communities⁴⁶. This is worrying in the light of research which indicates that in order to break the link between disadvantaged home backgrounds and poor educational outcomes, the work of schools with families and communities is vital. In this respect, there are many examples of what can happen when what schools do is aligned in a coherent strategy with the efforts of other local players – employers, community groups, universities and public services. This does not necessarily mean schools doing more, but it does imply partnerships beyond the school, where partners multiply the impacts of each other's efforts. It means ensuring that all children receive effective support from their families and communities, which in turn means ensuring that schools can build on the resources offered by families, and support the extension of those resources.

With this argument in mind, efforts are being made in the United Kingdom to promote the development of 'children's communities'.⁴⁷ These area-based initiatives, modelled on the Harlem Children's Zone in the USA, involve efforts to improve outcomes for children and young people in areas of disadvantage through approaches that are characterised as being 'doubly holistic'. That is to say, they seek to develop coordinated efforts to tackle the factors that disadvantage children and enhance the factors that support them, across all aspects of their lives and their life spans from conception through to adulthood.

In common with other area initiatives, children's communities involve a wide range of

⁴⁵ Miles, S. (2002) *Family Action for Inclusion in Education*. Manchester, Enabling Education Network.

⁴⁶ Op. cit. (Salokangas & Ainscow, 2017)

⁴⁷ Dyson, A. and Kerr, K. (2013) *Developing children's zones for England: What's the evidence?* London: Save the Children.

partners working together in a coordinated manner. Schools are key to these partnerships and may be their principal drivers. The aim is to improve a wide range of outcomes for children and young people, including but not restricted to educational outcomes – much less, narrowly-conceived attainment outcomes. Health and well-being, personal and social development, thriving in the early years, and employment outcomes are as important as how well children do in school. This arises not from a down-grading of attainment but from a recognition that all outcomes for children and young people are inter-related, and the factors which promote or inhibit one outcome are very likely to be the factors which promote or inhibit outcomes as a whole.

Moving forward

In summary, the six recommended actions that have emerged from this review of international experiences, research and policy documents are as follows:

Action 1: Establish clear definitions of what is meant by inclusion and equity in education.

Action 2: Use evidence to identify contextual barriers to the participation and progress of learners.

Action 3: Ensure that teachers are supported in promoting inclusion and equity.

Action 4: Design the curriculum and assessment procedures with all learners in mind.

Action 5: Structure and manage education systems in ways that will engage all learners.

Action 6: Involve communities in the development and implementation of policies for promoting inclusion and equity in education.

These actions have major implications for leadership practice within schools and across education systems. In particular, they call for efforts to encourage coordinated and sustained efforts around the idea that changing outcomes for vulnerable students is unlikely to be achieved unless there are changes in the attitudes, beliefs and behaviors of adults. Consequently, the starting point must be with policy-makers and practitioners: in effect, enlarging their capacity to imagine what might be achieved, and increasing their sense of accountability for bringing this about. This may also involve tackling taken-for-granted negative assumptions, most often relating to expectations about certain groups of students, their capabilities and behaviors.

It is also important that inclusion and equity in education are studied, encouraged and evaluated with an intersectional view that covers preschool, basic, secondary and tertiary education. This will only be possible if governments and civil society recognize that *'talents are equally distributed between rich and poor in all cultures, genders, nationalities and disabilities.'*⁴⁸

⁴⁸ World Health Organization and World Bank (2011). *'Encuesta Mundial sobre la Discapacidad'*.

Most importantly, this means that **governments must make a clear and genuine commitment to inclusion and equity**, emphasizing the benefits for parents and children, and for the community at large, whilst recognising that social inclusion and inclusive education go hand in hand. Here, it is useful to distinguish between **needs, rights and opportunities**. While all learners have needs (e.g. for appropriate teaching), they also have the right to participate fully in a common social institution (that is, a local mainstream school) that offers them a varied range of relevant opportunities. Too often, parents are forced to choose between ensuring that their child's needs are met (which sometimes implies placement in a special school or separate classroom) and ensuring that they have the same rights and opportunities as other learners (which means placement in a mainstream school).

The goal, then, is to create education systems where these choices become unnecessary. These systems should strive to support local schools and teachers by assisting them in developing their capacities to respond to diversity and by fostering collaboration across sectors. In this way, the legacy of Salamanca will continue to be influential. In particular, the argument made in the Salamanca Statement that *inclusive schools are an effective means of combating discriminatory attitudes, creating welcoming communities and building inclusive societies* continues to be highly relevant.

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