

ANTHOLOGY

**NO 3**

COMPARATIVE CLASSROOM STUDIES TOWARDS INCLUSION

# **International Classroom Studies of Inclusive Practices**

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**Comparing Teaching-Learning  
Processes**

**Berit H. Johnsen (Ed.)**

# International Classroom Studies of Inclusive Practices



Anthology no 3:

Comparative Classroom Studies towards Inclusion

# **International Classroom Studies of Inclusive Practices**

Comparing Teaching-Learning  
Processes

Berit H. Johnsen (Ed.)

ÇAPPELEN DAMM AKADEMISK

© Natasha Angeloska-Galevska, Irma Čehić, Daniela Cvitković, Alma Dizdarević, Aleksandra Karovska Galevska, Selmir Hadžić, Ljiljana Igrić, Snezana Ilic, Zora Jachova, Berit H. Johnsen, Darko Kobetić, Damjana Kogovšek, Stanislav Košir, Selma Džemidžić Kristiansen, Natalija Lisak, Goran Nedović, Martina Ozbič, Dragan Rapaić, Aleksandra Karovska Ristovska, Nevzeta Salihović, Kjell Skogen, Irena Stojkovic og Sadeta Zečić

ISBN: 978-82-02-47062-3

ISBN web-PDF: 978-82-02-71041-5

This is an Open Access edition of a book first published, in printed form, in October 2020. One chapter in the original print edition is not included in this edition: "A Child with Cochlear Implant in a Case Study of 'an Inclusive Classroom'" by Zora Jachova, Natasha Angeloska Galevska & Aleksandra Karovska Ristovska.

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Cover design: Roy Søbstad

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Typesetting: Bøk Oslo AS

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*In memory of  
Mr. Goran Đapić  
27.04.1952-04.05.2015*

*Project interpreter through two inter-European  
research and innovation projects (1998-2014)*

*Remembered with sorrow and gratitude*

*Always in our hearts with your  
generosity as both friend and expert*



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### **Part three**

#### **International Classroom Studies of Inclusive Practices**

##### COMPARING TEACHING-LEARNING PROCESSES

Berit H. Johnsen, Ljiljana Igrić, Dragan Rapaić, Nevzeta Salihović, Zora Jachova, Stanislav Košir, Sadeta Zečić, Selma Džemidžić Kristiansen, Natasha Angeloska-Galevska, Daniela Cvitković, Alma Dizdarević, Aleksandra Karovska Galevska, Selmir Hadžić, Snezana Ilic, Damjana Kogovšek, Natalija Lisak, Goran Nedovic, Martina Ozbič and Irena Stojkovic

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# Preface

Anthology No. 3, *International Comparative Classroom Studies of Inclusive Practices - Comparing Teaching-Learning Processes*, is presented here in a revised, Open Access edition. Minor changes have been made, and one article from the original book has been omitted.

This concluding anthology is devoted to the findings of the research network. Thus, the main part of the book consists of presentations and discussions of joint findings as well as articles accounting for each of the studies. Other texts contribute with related topics. Particular emphasis has been placed on methodological articles, as this cooperation is an international comparative research project based on qualitative methods.

The process - from the planning stages to the end results - behind *International Comparative Classroom Studies Towards Inclusion* has been documented in three anthologies. These books have been financed in part by the international research cooperation project WB 04/06: *Development Towards the Inclusive School: Practices - Research - Capacity Building: Universities of Belgrade, Ljubljana, Sarajevo, Skopje, Tuzla, Zagreb & Oslo*. Two of the anthologies describe and discuss the joint research process as well as the diversity of the studies of the research groups within the common frames. Anthology No 1 deals with how to prepare and formulate research projects, while Anthology No 2 focuses on methodological, theoretical and ethical considerations. Both contain joint texts and individual articles. In addition, a number of related topics are thoroughly explored in several articles. Selected texts from the other two anthologies have also been made available in Open Access form.

Oslo 01.11.2020

Berit H. Johnsen



# **PART ONE**

EXPLORING INCLUSIVE PRACTICES



# Exploring Inclusive Practices

*Examples from Schools within European Cultural Diversity*

Berit H. Johnsen

## Introduction

This book is the third and concluding book in the series *Comparative Classroom Studies towards Inclusion*. The three anthologies are linked to the international research cooperation project WB 04/06: *Development towards the Inclusive School: Practices – Research – Capacity Building: Universities of Belgrade, Ljubljana, Sarajevo, Skopje, Tuzla, Zagreb & Oslo*. Anthology no 1 dealt with how to prepare and formulate research projects. Anthology no 2 drew attention to the research process, focusing on theoretical, methodological and ethical considerations. Both anthologies contain jointly written texts and individual articles representing each research group at the seven universities, as well as articles from visiting researchers and other particularly relevant scholars.

The aim of this anthology is to present and discuss research findings. As in the two former anthologies, each research group presents articles about their studies in Part Two of this book. Part Three consists of the joint research report. It contains a comprehensive presentation of findings answering the primary research question: How does school teach in accordance with pupils' different levels of mastery and needs for support in the learning process (resources, barriers and dilemmas)? This report is the main part of the anthology, covering two thirds of the book.

“Qualitative Research – Does it Work?” Currently, quantitative research has a privileged position amongst many researchers and even more non-professionals. Concurrently, qualitative research is increasing within several sciences. Accordingly, participation in the methodological discourse is indispensable, since the joint international research project is qualitative and comparative. Two arti-

cles address this discourse, discussing the abovementioned question as well as international comparative qualitative methodology in Part One. Two other important aspects are discussed in more detail; one is a conceptual discussion of care and sensitivity and the other is about innovation challenges.

## Contributors

Twenty-two authors have contributed to this anthology. They are briefly presented in this book. An even larger number of researchers have participated in the process of compilation findings and in repeated rounds of reviewing the joint research report in Part Three. A large number of pupils and school classes have participated in the studies with the consent of and cooperation with parents, teachers and special needs educators as well as school principals. Several other professions and authorities have participated in providing permission for and information about the studies. The seven participating universities are key institutions in this cooperative project. The main incentive for the launching of the research cooperation was the financing of the WB 04/06 research grant for the project *Development towards the Inclusive School: Practices – Research – Capacity Building: Universities of Belgrade, Ljubljana, Sarajevo, Skopje, Tuzla, Zagreb & Oslo* (2006), which was partly financed by the Norwegian Cooperation Program on Research and Higher Education with the Countries on the Western Balkans (CPWB). Additional funding for the three anthologies was granted from the Faculty of Educational Sciences, University of Oslo. Researchers' work efforts are “funded” through their academic positions and personal efforts.

The working language was English, which prevented some of the participants from taking part in dialogue. Mr. Goran Đapić was therefore appointed project interpreter from the very beginning. He was well known to many of the participants from a former research and innovation project (SØE 06/02, 2002). Mr. Đapić interpreted consecutively singlehandedly and simultaneously along with a local interpreter. Since 2007, he has interpreted together with Ms. Vera Đapić. Mr. Đapić' interpreting has made the cooperation possible, and his fast, smooth and professional interpretation has played a key role in creating efficient seminars. As mentioned in Anthology no 2, Mr. Đapić has also translated articles from French and Serbian into English. Goran Đapić passed away in May 2015 after a period of illness.

All articles have been peer reviewed by project colleagues, internal colleagues at the University of Oslo and researchers from other universities and countries. The joint comparative report of the international classroom studies in Part Three has been the subject of an extraordinary number of internal peer reviews or member checking, as described in the report. All reviews have been important contributors to improving the quality of the texts. The close cooperation with publishing house proofreader Karin Lee has once again significantly increased the clarity and readability of our articles due to her conscientious and detailed work.

While there are several reasons, why the writing and editing process of this book took considerably longer time than expected two reasons stand out: 1) Heavy workloads regarding lecturing and other student-related activities. 2) Due to the abovementioned privileged status of quantitative research as the only applicable methodology, the editor has undertaken a time-consuming study of the history and current development in refining comparative and qualitative methodology, including the question of evidence. Consequently, several methods or tools are used to examine the quality and “truth value” of this qualitative international comparative research project – its strengths and limitations.

The cooperation with the generous and patient editor, Bjørn Olav Aas Hansen at the publishing house Cappelen Damm Akademisk has been highly appreciated throughout the process of creating this concluding anthology.

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# The Challenges of the School Leader

Kjell Skogen

## Introduction

The school leader is often the only individual who assumes overall responsibility for achieving a school's goals; as a result, (s)he often feels lonely at work. This leader's main responsibilities are comprehensive and complex. First and foremost, (s)he has to make sure that teachers have a clear and shared understanding of what are their responsibilities and areas of improvement. The school leader must then create an understanding among teachers that continuous improvement is necessary. Finally, (s)he has to guide the teaching staff through an ongoing process of innovation. In this article we try to give school leaders an understanding of the concept of quality (TQM), knowledge of the process of change based on the problem-solving strategy (P-S), and an understanding of the importance of learning from the process of change, which means creating a learning organisation based on the theory of problem-based learning (PBL). The school leader has to prioritise his/her role as coach for his/her teachers in these processes of ongoing improvement and focus on educational development for all pupils in an inclusive school.

The approach in this chapter is based on simple logic; it starts by pointing out that quality cannot be achieved once and for all but requires continuous improvements being made towards achieving certain goals (total quality management<sup>1</sup>). These improvements presuppose innovation taking place on the local level because centrally developed practical solutions are not always suitable everywhere. In each local professional environment co-workers have to be

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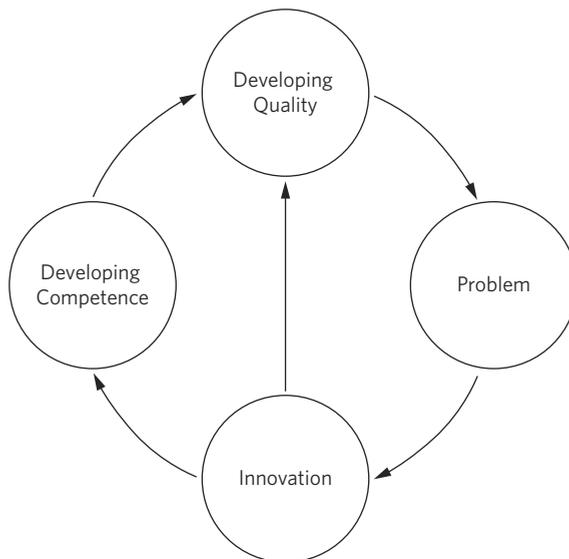
1 Shiba and Waldon, 2001

engaged in holistic innovation projects integrated into their day-to-day work. This process should be led and followed up by a qualified professional leader who can contribute to the individuals staying focused on their goals, thereby being creative and willing to learn how to develop an alternative improved practise.<sup>2</sup> In other words leadership is about facilitating staff members in the processes of

- improving practise, and
- learning from the process of improvement.

Schools' ultimate goal of providing a service that every pupil is to receive in accordance with government policy may be called adapted education. The school leader's main challenge then becomes to develop schools where teachers in collaboration with pupils *create the conditions and situations for learning so that pupils can realise their potential for learning*.

The theoretical framework of this chapter is based on a model for developing competence and quality which I have called *The Loop of Development* (see diagram):



**Figure 1.** The Loop of Development

2 Senge et al, 2004 & Senge, P, 2006

The Loop of Development illustrates that the starting point for change and learning is practical challenges in real life (Problem). On the basis of a real problem, the aim is to improve practise (Innovation). The purpose of the innovation is to improve the quality of the work that is being done (Developing Quality). Quality improvement must be evaluated in comparison with the practical problem with which we started. Professionals (teachers and leaders) who participate in the innovation process have to be trained to learn from their experiences so that they can improve their qualifications (Developing Competence). This method of learning is often called Problem-Based Learning (PBL); it is familiar to the majority of individuals working in the education and health care sectors.<sup>3</sup>

In the process of approaching the goal of developing an educational system where everyone can realise their potential for learning, for their own and society's benefit, the headmaster/headmistress needs a thorough understanding of the concept of quality. We have chosen to connect this understanding with the perspective of Total Quality Management (TQM).<sup>4</sup> Let us have a look at the four phenomena included in this perspective: *focus on the user, total participation, continuous improvement and developing competence*.

## Focus on the user

Defining the user has at times caused problems for a variety of experts. One such group of experts is comprised of educational professionals. Some of these experts have followed a kind of American 'management philosophy', regarding school owners and administrators as consumers of pedagogical competence. Others have focused on teachers and student counsellors. Still others have at times rejected any attempt to define the user, basing their reasoning on the belief that definition is an impossible task that is unnecessary at best and detrimental at worst.

The problem is that if we have no defined user, the knowledge we develop will lack focus. Because of the great challenges faced when developing a high level of relevant competence, it is easier for some individuals to be a bit vague. However, as responsible professionals we cannot allow ourselves this luxury; on the contrary, we need to be clear about whom we are serving.

In our work at school, there should be no doubt about the user's identity. Indeed, it is he or she who is about to learn and is therefore called the pupil or

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3 Evensen and Hmelo, 2000

4 Shiba and Waldon, 2001

student. The most important work here, which is mostly done by teachers, is to organise a learning situation that can provide each pupil with the opportunity to use their learning potential in the best possible manner. The school leader always has to be clear about the fact that the pupil is the primary user regardless of whether we are working with learning plans, pedagogical methods, teaching aids, school management, student groups, school buildings, textbooks, teacher training or educational research.

Of course, this principle is as impossible to realise fully in practice as it is simple to understand and support in theory. For example, a teacher might be busy either promoting himself/herself as a good candidate for the school principal post or trying to get work outside of education, and a principal might be busy competing with the neighbouring school about getting articles on his/her own school in the local newspaper. A researcher could be more concerned with gaining a position as a professor; a town official with trying to save money; while a politician is more concerned about making a positive impression on the electorate before the next election.

## Continuous improvement

There has at times been a widespread misunderstanding that quality is a condition that we can achieve; therefore, we become complacent. While it has long been known that realising innovative ideas take time, it is probably closer to the truth if we say that we can only come closer to realising a vision through striving for continuous improvement. Let us for a moment focus on the educational system's vision of creating *an inclusive school with individually adapted education for all*, and we can easily see the reality behind the demand for continuous improvement. This is an example of a phenomenon which is easily understood in principle but which is generally unattainable in practice. The question is therefore what we can do with an unachievable vision. The answer must be that we can only get closer to it yet never actually reach it; moreover, this has to happen through constantly taking small steps, as by doing so there will be continuous improvement. In order to explain this relationship, we can use the term *a problem-solving process*. More significantly, everyone can contribute to improving his or her portion of the work to benefit the user. For example, every teacher, both individually and in collaboration with others, can contribute towards the school becoming a place for everyone and helping to ensure that all pupils increasingly receive individually adapted education.

## Total participation

Even if each of us has a clear idea of who the user is and keeps this in mind, the pupil might still experience a chaotic, unfocused and confusing learning environment, which in a worst case scenario could become a hindrance to his/her learning. This depends among other things on all the participants having the same understanding of what they are doing. They must working wholeheartedly towards the same goals, and their efforts must be co-ordinated. In other words if every pupil is to receive individually adapted education, all those involved need to have a shared understanding of what individually adapted education is and how it can best be achieved. It is also essential that they have an understanding of the pupil's overall situation and organisational context, which is often called 'system knowledge'. If system-oriented initiatives are to work as intended, they demand participation from all relevant agents, and this effort has to be co-ordinated with a focus on the pupil's needs. In order for this complicated interplay to work in practice, there is the requirement for leaders to assume overall responsibility at the same time that every agent assumes their share of the collective responsibility.<sup>5</sup> The challenges of project management and teamwork in this situation are formidable.<sup>6</sup>

A socially responsible corporate culture depends on full participation on several levels. It depends on macro-level co-ordination in order to manage global resources in a way that in the long term benefit all of humankind. It depends on co-ordination on the local and regional level so that the development and sale of products and services become cost effective and adapted to customers' needs. It also depends on enabling the last link of the chain, the individuals who are in direct contact with customers (pupils) to provide the best possible service. In order for our pupils to get the full benefit from our school system, as determined by us through our legislation and curricula, we require full participation on all levels of society, including schools and outside groups.

## Developing competence

A substantial amount of research exists on the importance of following up teachers and other professionals after they have completed their education.<sup>7</sup> There is

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5 Kotter and Cohen, 2002

6 Day et al., 2000

7 Von Krogh, 2000

also well- documented research showing that within the school system it is the teacher him-/herself who is the most important professional agent; therefore, we should make it a priority to develop their competence.<sup>8</sup> The need to develop one's knowledge throughout a lifelong career has been becoming more and more obvious.<sup>9</sup> This kind of competence development should of course also be seen as a responsibility of society as a whole, with the Department of Education, universities and colleges as key agents in this regard. Responsibility could be shared in collaboration with teachers' organisations, school owners and higher education institutions. This arrangement could be an effective way of ensuring quality improvement, which would undoubtedly benefit pupils. Continuous improvement requires that experiences be retained and that organisations learn. The School Leader has to take responsibility for developing a learning organisation (a learning school).<sup>10</sup>

If we are going to be able to continuously improve our work in giving every pupil an increasingly better adapted education, it requires the participation of all involved groups and individuals. This raises significant challenges for organisation, systemic development, management and learning, which in turn requires the establishment and use of *social networks* which need to meet the following three conditions;

- emphasise the development of a network-friendly infrastructure locally, regionally and nationally and which also relates to society as a whole
- the different various and organisations, for example schools, must be open to sharing their relevant 'cases' with each other for mutual learning
- the need for change agents, or process consultants, which might be a more familiar term, must be made clear.<sup>11</sup>

In the process of implementing schools' internal problem-based learning strategy, the following activities are important:

- reflecting on the need for new knowledge, and
- reflecting on knowledge before using it,
- reflecting on the practice/problem in relation to personal knowledge<sup>12</sup>

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8 MacBeath & Mortimor 2001

9 Senge et al., 2004

10 Senge, 2006

11 Shiba and Waldon, 2001

12 Evensen and Hmelo, 2000

The reflection must naturally be related to relevant theory if we want to raise competence levels. Natural scientist and author Piet Hein discusses in one of his poems the people who ...*despise theory and instead claim a practical idiocy which has many hidden theories in it...* We can call this 'pragmatism' and contrast it with 'academicism' where one dreams of developing grand research-based theories which should be able to provide all the principles for practitioners to first read about and then implement in practice. In Piet Hein's spirit we can postulate that behind every human action lies both a choice of values and a choice of theories.

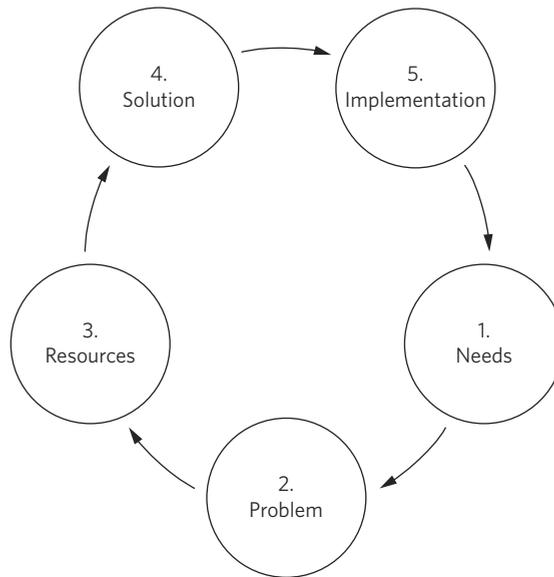
## The problem-solving strategy of innovation (P-S)

In the following we will specify and develop a way of working to follow up the intention of realising in practice an overall approach to developing quality and upgrading competence in an organisation. We are choosing school as an example of an arena, a teacher as an example of an employee, and the five phases of the P-S-model as the starting point of this exposition:

- |                                                                       |                                                                 |
|-----------------------------------------------------------------------|-----------------------------------------------------------------|
| Phase 1 <b>Needs:</b>                                                 | experience of the present situation and the need for change     |
| Phase 2 <b>Problem:</b>                                               | clarify, specify and define the need for change                 |
| Phase 3 <b>Resources:</b>                                             | exchange and gather knowledge, ideas and experiences            |
| Phase 4 <b>Solution:</b>                                              | develop suggestions for solutions with plans for implementation |
| Phase 5 <b>Implementation:</b> apply and evaluate the chosen solution |                                                                 |

The following figure indicates how the phases follow each other logically from 1 to 5; and that after implementation, we start analysing needs once again.

When organising adapted education in an inclusive school, it is each pupil's resources and potential for learning which form the starting point for any innovation and which must be seen in connection with the goals as they appear in legislation and curricula. Innovation has to focus on the pupil's development and learning. When organising education that is adapted to the individual pupil, it is the pupil who is the **primary user** of the school organisation, and the teacher is the most central **internal user**. The P-S-model may be used on two school levels:



**Figure 2.** P-S-model

1. The internal user (the teacher) can use the model to organise education for the primary user (the pupil) in the best possible way – **the primary level**.
2. School will be the natural organising unit for innovation which purports to upgrade teachers' competence in order for them to contribute to improving the quality of work at school – **the secondary level**.

The *secondary level*, where individual schools innovate locally, will now be the main focus of discussion. These innovations obviously have to be structured in order for them to contribute towards a continuous improvement on the primary level (pupils, students etc.), and this should be one of the School Leader's central tasks.<sup>13</sup> Other tasks such as administrative and financial management work, must be seen as supporting or assisting the development of quality and competence.

## Needs

According to the P-S-model, innovation will have a positive starting point if the main participants *experience a need for improvement* in a specific area. We should emphasise the importance of the central participants experiencing

a real and existential need for change.<sup>14</sup> In this context it is argued that a need which is experienced as a crisis is the best starting point for change, and that staff members who are satisfied with their situation will not be loyal supporters of innovation. We are talking about the importance of having a sense of ownership of an innovative idea; thus, we can safely say that it is unwise to initiate innovation without a process where the affected staff members have participated in discussions and had a real influence on the planned project. When a school experiences a dramatic increase in disruptive behaviour combined with poor exam results, it most likely will not be difficult for a leader to get people motivated for innovation. On the contrary, in these circumstances ideas will often come from further down the system, and the leader can simply implement these requests from the “grassroots”. However, the need for innovation will often be more diffuse and controversial, as for example when educational authorities want fewer resolutions in relation to pupils with special needs or ask that a particular method (for example, the project method) constitutes a certain percentage of the education programme. It may also be difficult to gain support for restructuring when the connection between the organisational structure and quality is not immediately apparent. In both the corporate world and public administration, there are numerous examples of restructuring where the only thing clearly understood by the staff members is that the new leader wants to improve his/her own status. One could claim that a leader has two possibilities to initiate innovations in his/her organisation and secure a sense of ownership of them amongst his/her staff by doing the one of the following:

- intercept needs or an idea coming from further down the organisation, or
- sell an idea coming from the top or outside of the organisation.

The least complicated option is obviously to intercept ideas from further down in the organisation. These projects can get off to a flying start because there has often been an informal internal discussion about them before their launch. The leader can ‘pick a ripe fruit’, so to speak. It is much more challenging to either follow up ideas or needs coming from management, marginal internal groups or external groups. In order for innovation to work, one has to be sure that the idea has *wide support* among both staff members and management in the organisation. One also has to be fairly sure that all the participants have a *concrete and shared understanding* of the idea.

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14 Kotter and Cohen, 2002

## Problem

The second phase of the P-S-model concerns what is often called a problem diagnosis. This is about realising, clarifying, defining and describing the problem or challenge from which the need for change springs. It is obviously unsustainable to start an innovation project based purely on a perceived need because work done in this phase often proves vital to implementing the project. Individuals have to be realistic about their level of ambition, measuring their potential for improvement with available resources. In this phase final checks must also be made in order to ensure that the problem is clearly understood and there is a shared understanding of the challenge at hand.

One possible approach here is to work out a description of the situation at the time of the project's start and from there describe in detail any aspects that are unsatisfactory. The next step is to come up with some alternative explanations of why these aspects are not working. If possible, the ideal situation, or alternative situations attempted to be approached through the innovation project should also be described. If an ideal situation is unattainable, realistic secondary goals (milestones) should be formulated. It is important that the goal of the project is to achieve something that is desirable, not only to get away from something undesirable. At the same time it is important that there are achievable short-term goals in order to confirm whether or not the correct path has been chosen.

Last, but not least, it is important to ensure that the problem is relevant to the primary user's needs and/or rights. As far as school is concerned, this is easy in principle because we have very clear guidelines from school policies regarding our mandate; the previously mentioned requirement for pupil-adapted education in an inclusive school. Practically speaking, this is very difficult, as it requires continuous follow-up and evaluation to ensure that our methods, working conditions, aids, organisational style and so on bring us closer to our goal. This type of evaluation needs to be a part of all phases of all innovation projects.

When the diagnosis to a problem has been made in order to clarify the need for change, it is important to involve both pupils (as primary users) and teachers (as secondary users), as well as other relevant participants in the process. It is, however, also important at this point to take the pupil's needs and conditional framework, or context, as a starting point. The school's conditional framework must be adapted to pupils' diversity and each pupil's ability and needs. There are many conditions to consider in today's school, including: the teacher's *working methods*, *organisation* of instruction, *competence* to take on the tasks required by law of the teacher, *resource management* and finances.

All these areas are key conditional frameworks that we can easily relate to most of the a school's perceived needs. We often have more possibilities than we can see – and it is important to see the possibilities and not be too hung up on what limits progression. The teacher's choice of *working methods* is an important factor of adapted teaching. The teacher's teaching practice is of the uppermost importance and must therefore be regarded in connection with theory showing how it contributes to pupils' learning. The choice of working methods can for example be based on the assumption that teaching is most effective when pupils have a high level of activity and involvement.

How schools *organise* education is also a factor that plays a major part in turning adapted learning into practice. As a rule, a flexible structure must be planned that facilitates the use of different working methods, which in turn is an important prerequisite for providing adapted education for all. Educational policy and the curriculum are also important factors because they provide us with direction for the work to be done and hence the competence needed to implement this work in schools in both the classroom and for the individual pupil.

If teachers at a school are to grasp the necessary working methods and implement the necessary restructuring, they must have specific areas of *competence*. While relevant knowledge is required in school policies and the curriculum, teachers do not automatically possess it. They must therefore be provided with opportunities to continuously pursue professional development. This could be an important condition in order for teachers to view the law as a challenge and develop a sense of ownership of it. They should also participate actively in the innovations which must take place in schools at all times.

In order for schools to realise the working methods, organisational structures and competence needed to provide adapted education, appropriate *resource management* and sufficient economic funds are required. A great deal can be achieved within the existing financial framework; however, the request for funding is often so urgent that it dominates school operations. Perhaps some teachers have too great a belief that an increase in economic resources can solve the problems with which schools are struggling. Lately, this topic has surfaced during debates about special needs education. We have registered that although there is a tendency here to want more funding to do more of the same things, there is obviously a need for professional development as concerns the quality of training in special needs education. When it comes to financial resources, it is always necessary to make choices and prioritise. It is not unusual that small

reallocations solve problems, thereby preventing these problems from becoming too great to solve.

It is important that united collegia spend the time and effort necessary to describe the problem which is most likely the cause of their perceived need – it is easy to abandon this phase too soon.

## Resources

In the first phase, we have focused on our needs for change and potential for improvement, and we have made this more concrete in the second phase in relation to working methods, organisation, competence and resources. In the third phase, the time has come to obtain the necessary competence and ideas in order to implement an actual improvement. According to the P-S-model, in this phase we aim to collect and develop an overview of the available knowledge relevant to our ambition to improve the practice in the relevant area. At the same time, it is important to look for good ideas on how to utilise this knowledge in order to realise our planned improvement of a more adapted and inclusive education. It is important to focus on both the *barriers* we have to relate to and the *possibilities* we can utilise. We then have to mobilise both our knowledge and professional networks in this work. This is about *where* we can find ideas and knowledge and with *whom* we can collaborate. A natural place to look is in available books, journals, magazines, periodicals, databases etc. In addition, we should not neglect experiences gained from our own work and workplace, which, while they might have been partly recorded in reports and similar things, unfortunately often exist only in our memory, becoming oral retellings. We really should write our experiences down so that we and our colleagues will be able to learn and expand on them at a later stage. Even if our own experience and knowledge are of vital importance, we cannot avoid using our professional networks. Your own place of work, for example a school, is an important arena from which to obtain experience. Neighbouring schools, colleges and universities also constitute central collaborative partners. A more developed generation of the P-S-model operates with an *external consultant* who has specific qualifications, including both the expertise and experience required to guide us through innovation. An educational-psychological service, a public special education support system, local resource centres or a certain number of private consulting companies can provide help and support. However, it is important to keep in mind that the core of all educational innovation is the teacher's ability and desire to critically and creatively reflect on his/her own practice.

Let us continue to illustrate this work, starting from the categories used above, beginning with *working methods*. When a teacher chooses his/her working method, this is based on the experiences of the teacher (practice) and assumptions (theories) about what advances learning and development. It is therefore important that the experiences are varied and rich, and that the relationship to theory is characterised by an open and inquisitive attitude. The age of each pupil, their level of knowledge, ability to concentrate and physical as well as intellectual level, will be some of the central variables in the choice of working methods. In other words, there are many great challenges and ways to differentiate teaching, and it is important to evaluate content, working methods and teaching aids in context. Pupil participation and activity create motivation and contribute to pupils taking responsibility for their own learning.

Another angle is *competence* in the tasks that teachers are legally required to perform. There are many requirements laid on teachers, meaning there are high expectations of teachers' competence. Educational law and the curriculum provide direction for the work to be done in schools and the experience that teachers need to have in order to fulfil these requirements. With new tasks regularly being added to schools' workload, there are new requirements for competence in the different areas. There is continuous change in the school system, meaning that teachers have to participate in competency innovation and development. In this context it is natural for teachers, school administrators and owners to find out if teachers have the professional competence necessary to fulfil schools' politically defined goals. It is the teacher who is ultimately responsible for finding out and evaluating if he or she has the competence necessary to carry out the required tasks. Some relevant questions that may be used in this connection are:

- How are the tasks at hand covered by the teacher's competence?
- What kind of professional development does the teacher feel he/she needs?
- How can the teacher develop his/her own competence?

The last categories that we have focused on in this context deal with *organisation* and *resource management and finances*; these are all of great importance to the implementation of an inclusive education that provides adapted education for all. A great deal can be achieved within existing resources and financial allocations. In order for this to happen, it is important to be aware of how the available resources are used. If there is a need to re-organise priorities, this can be the first step to an innovation project, as minor adjustments can often solve the problem. Re-organisation can be useful both to achieve good

resource management and lay the foundation for new work practices. However, re-organisation that is not rooted in a solid needs analysis may be either a waste of time or directly harmful.

We have now considered *phase three* in the P-S-model – ideas, experiences and information – about knowledge gathering and exchange. We will now move on to *phase four* – suggestions for solutions and formulation of a plan for implementation.

## Solution

In *phase four*, which we are now entering in accordance with the P-S-model, we formulate concrete suggestions for creating a solution then choose one suggestion and develop a plan for implementation. This must start from a perceived need (see phase one), the descriptions which emerged when setting the problem diagnosis (see phase two) and be based on the experiences and ideas for solutions (see phase three) which have already emerged. Now is the time to formulate the plan for implementing the initiative. Reaching agreement among the participants regarding the solution's choice and formulation can be a long process. Some teachers are so impatient to start up initiatives that they do not allocate the necessary time to this phase. However, one quickly discovers that if insufficient time is allocated for the participants to come to agreement and reach a shared understanding of the chosen solutions, it will negatively influence the implementation plan. It is therefore recommended that enough time be put aside for this phase, where suggested solutions and the plan for innovation implementation are formulated in collaboration with all the involved participants. At the same time, one has to prepare for how to deal with potential obstacles which may arise during the innovation phase.

## Implementation

When the perceived need from phase *one* is realised in the *second* phase, relevant ideas and knowledge gathered and systematised in the third phase and a suggested solution formulated and chosen in the fourth phase, we have reached the *fifth* phase, which is called implementation. This phase also includes evaluation to find out if the innovation's goal has been achieved. At the same time, it is natural to think of how to *disseminate* the relevant new practice.

Many people view implementation as the basic process in innovation because it is in this phase of the innovation process that any improvements will have consequences for further practise. The implementation strategy will obviously vary according to which areas we are focusing on, and we have to especially consider the phenomenon of *ownership*.<sup>15</sup> In order to best succeed with the innovation plan's implementation, it requires among other things that the innovators (the headmaster/-mistress) focus on the participants' sense of ownership. Hopefully, this has already been well established in the previous phases, but this does not exclude the need to maintain and develop the sense of ownership in this phase, too. If the working method that is chosen and implemented concerns improving the project-work method, it will be important to develop a sense of ownership of this change both beforehand and during implementation. If teachers are sceptical of project work as a starting method, this will have consequences for the innovation which is being implemented. As we already know, a sense of ownership is developed through *participation* in the process of planning and decision making. It would therefore be unwise to implement a version of the project work method without it having been developed by the teachers themselves, possibly assisted by a particularly experienced or competent colleague. Even if this version of the model has been applied successfully in other places, it is still crucial that the teachers in question make the necessary adjustments before and during the implementation phase.

The *barriers* that have not been dealt with before this phase have to be worked on during the phase we are now in. At the same time as the relevant working method requires changes in teachers' roles, it usually requires organisational changes as well, for example adjusting the timetable, length of each shift etc. It also determines requirements concerning participants' competence; for example, it presupposes that the teacher will develop his/her qualifications in the relevant area in both methods and counselling. This could be about how a teacher masters certain specific approaches within planning, organising, implementation and evaluation. Furthermore, it may be about specific counselling skills. The more independently pupils work, the more counselling or instruction has to be part of a teacher's job, which can require improving his/her counselling competence. These changes often require resources; therefore, there must be a focus on good resource management.

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15 Rosen and Carberry, 2003

As is clear from the above, these five phases cannot be viewed as mutually exclusive categories which follow each other step-by-step (serial). On the contrary, each phase has its specific tasks and challenges, and it will be necessary to follow up these challenges and problems in the subsequent stages. It will be necessary to improvise, planning ahead and being prepared to make adjustments at all times. Innovations are complex systems, which in a school setting cannot be supported purely by a strictly rational and linear logic. The P-S-model is, however, flexible enough to include the nuances and unpredictability of reality, and as such has a disciplinarian effect on the participants in innovation projects.

## Prologue

The reputation of the school leader depends on how well he/she has managed to change his/her school into a better place to learn for all its pupils. He/She is expected to achieve an inclusive school that provides education for all (EFA).<sup>16</sup> In this article we have tried to give the School Leader some tools for guiding his/her teachers and help them continuously improve their instruction. Among all the challenges a School Leader faces, this must be considered the most important and must therefore be given top priority.<sup>17</sup> The ultimate challenge for a leader will always be *making innovation work*; and for a school leader, this means *working for the benefit of his/her pupils*.<sup>18</sup> In addition to clearly understanding and accepting this focus, the leader needs to have a mind suitable for innovation, decision making and problem solving.<sup>19</sup>

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# Care and Sensitivity in Resource-Based Interaction Traditions within Education and Upbringing

## *A Conceptual Discussion*

Berit H. Johnsen

### Introduction

Learning is all in all the process that forms the single person  
to an active or passive individual,  
to a responsible or incredible,  
to a creative and constructive  
or, at worst, destructive human being<sup>20</sup> (Befring, 1994: 11).

This notion of learning as stated by Norwegian scholar and special needs educational mentor, Edvard Befring, implies the complexity of learning opportunities. Due to this complexity, Befring emphasizes the importance of facilitating favourable learning conditions at home and school as well as within the community. In his book, *The Redemptive Pedagogy* (2014), Befring denotes this positive facilitation for learning, sharing positive, resource-based approach to the child, learner and learning environment with a growing number of scholars. What characterizes this discourse? Supporters of this approach apply a variety of concepts, arguments and nuances. Prominent in the discourse are the terms

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20 The quotation is translated by the author of this text. The original Norwegian text is as follows; *Læring er alt i alt den prosessen som formar mennesket – og gjer det til eit aktivt eller passivt individ, til eit ansvarsfullt eller lite truverdig, til eit skapande og konstruktivt eller i verste fall destruktivt menneske.*

*care* and *sensitivity*; two concepts that are associated with other terms such as *empathy*, *sympathy* and a third term that is currently receiving increasing attention, namely *mentalisation* – as well as several other related terms. The purpose of this text is to clarify these core concepts and discuss how they are used in ordinary- and special needs education, inclusion and related fields.

A positive, resource-based approach to educating the child is not a new idea. Throughout the history of ideas in education and special needs education, there are many examples of scholars who base their teaching on the child's mastery and resources (Johnsen, 2000). Thus, a resource-based approach to teaching, learning and development has been approved in different ways by different idea creators at different times. It has also been relegated to the background by other more privileged ideas and traditions. How have resource-based approaches been described? What do they mean? How have ideas about resource-based approaches contributed to shaping educational and special needs educational research and professional identity? Lastly, how have they been transformed into useful knowledge and experience? The two concepts, care and sensitivity, are at the centre when in the discussion of these questions.

## Care and sensitivity in two related research-based approaches

How are the concepts of care and sensitivity applied today? Two different, but related research-based practice approaches are used as examples in order to highlight the question. Both are developed by Norwegian researchers and used internationally. Care and sensitivity assume central positions within these positive, resource-based approaches to education and upbringing: 1) the *Curricular Relation Approach*<sup>21</sup> focusing on educational and special needs educational planning and practice of individual- and class curricula (Johnsen, 2001; 2007; 2014a); and 2) the *Resource-Based Interaction Approach* focusing on caregiver-child interaction in general (ICDP)<sup>22</sup> developed by Hundeide and Rye (Hundeide, 2010; Rye, 2001; 2002; 2005; 2007).

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21 The approach is illustrated by a curriculum relation model consisting of eight main aspects of the teaching-learning situation and -process. The curricular main aspects or areas are all in a continuous interrelationship with each other and with the intended users of the tool, the practitioner and the researcher. The main areas are: the pupil/s – educational intentions – educational content – methods and organisation – assessment – communication – care + context / frame factors (Johnsen, 2014a).

22 ICDP: International Child Development Programme was registered as a foundation in Norway in 1992 (Rye & Hundeide, 2010).

- 1) The Curricular Relation Approach is a didactic relational approach to curriculum practice focusing on individual pupils in the community of the class. The approach situates care as a core aspect or arena of the didactic relationship between educators and pupils – along with seven other main aspects of vital importance in the teaching-learning-development process (Johnsen, 2014b; Vygotsky, 1978; 1987). Based on the principle of inclusive education, the focus on care represents a special needs educational extension of traditional discipline – or knowledge- and skills related classroom education. Care is essential, since positive learning depends on satisfying basic human needs such as a sense of belongingness and acceptance, recognition and dignity (Befring, 2014; Johnsen, 2014a; Rye, 2005). Therefore, according to this view, we need to be aware of not only the learner, but the whole child and adolescent within her or his social and cultural context, and with his or her personal history (Johnsen, 2014a; Noddings, 1992; 2002; 2003). We also need to be conscious of the cultural heritage and conditions that we share with our pupils, including potentials for happiness as well as barriers and even traumas. Displaying sensitivity towards pupils' personal circumstances as well as their entire range of developmental potentials and needs is an important and often difficult part of our challenge as teachers and special needs educators. Our pupils need to perceive that we care about them. This caring reveals itself in our attitudes, in small informal talks, in eye contact or a light touch on the shoulder, in giving positive feedback about what was good in the homework as well as in concern when necessary. Care and sensitivity manifest themselves in how we plan, implement and evaluate all aspects of the education of each individual pupil and the class as a whole.
- 2) While the Curricular Relation Approach has been developed as an educational tool in the developing inclusive school, the Resource-Based Interaction Approach focuses on the interaction between caregivers and children from birth and onwards. Rye (2001; 2005) and Hundeide (2010) direct their attention towards the caregiver – both parents and professionals. The main pillars of their resource-based interaction approach are a) eight themes for resource-based communication and mediation<sup>23</sup>, and b) focus on the caregiver's sensi-

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<sup>23</sup> In short, the eight themes focus on 1) demonstrating positive feelings for the child, 2) adapting to the child, 3) talking with the child, 4) giving praise and recognition, 5) helping the child focus attention, 6) assigning meaning to the child's experience, 7) elaborating and explaining shared events, 8) helping the child develop self-regulation.

tivity towards children and others in their care. The goal of ICDP is to support parents and other caregivers in raising their awareness of their own abilities as sensitive, resource-based caregivers, and support this ability's further development. Certified ICDP facilitators and trainers are important in this connection. Their task is to facilitate caregivers in dialogue groups in order to raise their personal consciousness, and in this way to support their empowerment. Due to this factor, being an ICDP facilitator and -trainer means to be in a continuous personal process of recognising one's own abilities to be sensitive when interacting with others. This is a life-long process. Developing the ability to be sensitive in different situations and interactions leads to rising confidence and thus to higher competence as facilitators, trainers and caregivers.

Above, the notions of care and sensitivity are situated within the two related approaches; the Curricular Relation Approach and ICDP's Resource-Based Interaction Approach. What is actually meant by the two important notions of care and sensitivity? How are they related to other important concepts and research-based interaction traditions? In what way can they contribute to the practice of positive, resource-based approaches in teacher-pupil and caregiver-child interactions? How are these concepts connected to education, special needs education and other related fields? In spite of examples and specific recommendations put forth in order to recognise and further develop care and sensitivity (Hundeide, 2010; Johnsen, 2007; 2014a), some uncertainty and even confusion exists. This may be due to different interpretations and conceptual usage, not least because these concepts are "located in a linguistic landscape" with other, related terms that are also subject to different interpretations. Therefore, the next step in accounting for the terms "care and sensitivity" is to discuss them in connection with a limited selection of concepts, whereof sympathy, empathy and mentalisation stand out along with other closely related concepts.

## The role of empathy in care and sensitivity

Empathy has a prominent role in ICDP's resource-based interaction approach. Hundeide places empathy as an important goal of sensitization:

What we call sensitization is to increase the caregivers' own sensitivity so that they can use their own empathetic capacity and practical experience to understand the other, i.e. to interpret the other's state and feelings so that they can respond sensitively and adjusted to the other's state and needs (Hundeide, 2010: 76. underlined by the author of this text).

The following is stated in the opening of the ICDP facilitator's handbook (Hundeide, 2010:5): "The programme is based on universally accepted humanitarian values about the significance of activating human *empathy* and compassion as a basis for care for children in need". Hundeide writes about empathic identifying with the child's state (2010:10), and gives a detailed account of "the zone of empathy", starting with the following (2010:19): "We place within the zone of empathy those people with whom we have a personal relationship ("me – you)". Thus, as documented, empathy is a basic concept for understanding as well as practicing Resource-Based Interaction Approach as described in the handbook. It is one of several bridging concepts and is closely associated with sensitivity. It is therefore of specific interest to explore the construct and use of empathy. How is empathy related to sensitivity and sensitization and how are these concepts connected to theories underlying this approach?

Discourses on care, sensitivity and empathy do not take place solely within education and special needs education. On the contrary, they are relevant to research and practice within most fields where human relations are in focus, such as psychology and healthcare disciplines, including psychiatry, and also in philosophy. Zahavi and Overgaard (2012: 3) point out two reasons why both philosophers and psychologists are interested in the notion of empathy; a) its relevance for moral theory – the idea being that empathy leads one to respond with sensitivity and care to the suffering of others; and b) recent research on social cognition emphasizing that empathy may hold the key to basic issues of interpersonal understanding.

Empathy is seen as a main concept within modern humanistic theory, which is one of the theoretical-philosophical pillars of both the Resource-Based Interaction and Curricular Relation Approach. Rye (2001) refers to Carl Rogers (1902-1987), who is widely recognized for his humanistic person-centred therapy as well as his thorough account of empathy as a core concept. In his well known 1957-article, Rogers describes empathy as follows: "To sense the client's private world as if it were your own, but without ever losing the "as if" quality – this is empathy ..." (Rogers, 1957; 99). Rogers describes empathy in teaching as first understanding the pupil's private world and then being able to communicate some of the significant pieces of that understanding (1980 in Swan & Riley, 2012). He notes certain attitudinal qualities existing in the personal relationship between teacher and pupil – facilitator and learner – that yield significant learning. In other texts Rogers (1975) returns to the concept and expands on it further, arguing that he would not characterize empathy as a state, but rather a process. This is in line with the logic of ICDP (Hundeide,

2010; Rye, 2005). Developing empathy is a never-ending process, and Hundeide (2010) points to a number of ways to develop this ability, such as the seven principles of sensitization described in the ICDP-handbook. Thus, empathy is a core concept describing and prescribing a basic human ability needed for special needs educational counsellors and facilitators of dialogue groups, so that they can support parents and professional caregivers and educators to discover and strengthen similar abilities.

## **Sympathy and empathy -inclusion and attention**

There is reason to believe that Roger's account of empathy has contributed strongly to current extensive use of the term within social welfare and related professions. The term has gained an era of professionalism, whereas the term sympathy is widely used for similar phenomenon in conventional everyday language. Thus, current discourse of care reveals disagreements when it comes to application of the two related concepts. How does this uncertainty affect the discourse on care, sensitivity and related key concepts? And, what are the arguments for and against using each of the terms? A brief review can clarify as well as widen perspectives concerning the concepts and phenomena of care and sensitivity.

Hundeide (2010) applies the work of one of Rogers' humanistic forerunners, Martin Buber (1878–1965), when he characterizes the zone of empathy as a personal relationship or an "I – Thou" relationship, which refers to Buber's famous discussion of the term. However, Buber himself (1947) is critical to the concept of empathy, which he describes as an individual's effort to get outside him- or herself and enter another's perspective. According to Buber, viewing the world from another's vantage point certainly is positive. It promotes emotional connections between people that are crucial to overcoming exclusion and making peace desirable. However, Buber argues that empathy goes too far when it fails to maintain the necessary distance between individuals. Thus, while learning to see "from the standpoint of the other" is crucial, it needs to happen in a manner so that each person does not lose sight of his or her own standpoint (Shady & Larson, 2010). Why is it important not to lose sight of one's own standpoint? The consequence of "getting lost" in others' standpoints in the sense of losing one's own moral compass, may at worst lead to mass suggestion or mass hypnosis. The Nazi mass propaganda was still in fresh memory in the nineteen forties and fifties.

Therefore, Buber (1947) criticizes the concept of empathy and instead draws attention to another concept that is at the core of current political-professional discourse, namely inclusion.

How can inclusion be more helpful as a characteristic of the intimate human-relation dimension of communication – the communicative act? Buber relates inclusion to concepts similar to communication, namely ‘dialogue’ and ‘dialogical relation’, clarifying his argument as follows:

It (inclusion) is the extension of one’s own concreteness, the fulfilment of the actual situation of life, the complete presence of the reality in which one participates. Its elements are, first, a relation, of no matter what kind, between two persons, second, an event experienced by them in common, in which at least one of them actively participates, and, third, the fact that this one person, without forfeiting anything of the felt reality of his activity, at the same time lives through the common event from the standpoint of the other.

A relation between persons that is characterized in more or less degree by the element of inclusion may be termed a dialogical relation (Buber, 1947: 124-125).

Through putting forth this argument, Buber places ‘dialogical relation’ described as open, positive and profound communication, as what today may be called an inclusive practice (Johnsen, 2007; 2014a).

Does Buber’s critique of empathy relate to Rogers’ empathy concept? Close examination of the two humanists’ accounts reveals that Rogers considers Buber’s critique with his emphasis on the two words “as if”. By placing a particular emphasis on these two words through writing them twice, his account of empathy comprises Buber’s critique: “To sense the client’s private world as if it were your own, but without ever losing the “as if” quality—this is empathy ...” (Rogers: 1975). However, as shown, Buber’s argument quoted above, offers a new perspective to this fundamental ethical-philosophical discourse with his alternative focus on the dialogically related communication as inclusive practice; a perspective that contributes to a profound interpersonal quality to the later pronounced Salamanca Statement of inclusion (UNESCO, 1994).

One reason why Buber prefers the term sympathy to empathy may be that he is well acquainted with his contemporary Max Scheler’s philosophical anthropological texts. Scheler’s book, *The Nature of Sympathy* (1912; 1954) is a groundbreaking account of the concept and related terms. In what way is his work relevant for current understanding and use of the two terms? Scheler’s systematic discussion constitutes a basis for current somewhat unclear con-

ceptual understanding. How does he describe sympathy and what other terms does he use in order to illuminate the concept? Exploring the phenomenon, Scheler identifies a series of interdependent forms or aspects, whereof some are mentioned here:

Sympathy is a complex overarching or generic term consisting of:

- Identification of a sense of unity (Einsföhlung)
- Fellow-feeling or a shared experience of feelings (Mitgeföhl)
- Vicarious or derived feeling (Nachgeföhl)
- Empathy (Einföhlung)
- Mutually shared feelings for the community (Mitainanderföhlen)

One of Scheler's main arguments is that the phenomenon of sympathy consists of more than an ethical aspect, namely also complex aspects or forms of emotions; including a) an intuitive or momentary recognition of the feelings of a dialogue partner; b) sharing feelings with a fellow human being; and c) sharing feelings for the mutual community, as illustrated with the terms mentioned above. Empathy or the empathetic understanding happens in the face-to-face encounter with another person – not merely as a physical being or a hidden psyche, but in the moment I perceive You as a unified whole (Scheler, as interpreted by Zahavi, 2001; 2014). Zahavi's discussion of empathy is more complex than Roger's description, which is reasonable, since Zahavi makes use of important parts of Scheler's multifaceted argumentation. However, Zahavi does not adequately distinguish between the term empathy and the generic concept sympathy with its complex interdependent aspects or forms (Scheler, 1954). Sympathy is the overriding concept here and, as shown, it contains a series of interdependent psycho-social nuances. Empathy is not the most vividly discussed term in Scheler's work. At that time, it is a rather new concept, earlier used about the aesthetic ability to emotionally immerse into a work of art (Scheler, 1954). It seems that the term empathy has replaced the overriding psycho-social philosophical term of sympathy within social and psychological discourses around the 1950-ies (Agosta, 2011).

Why does empathy have a privileged status in today's professional vocabulary, whereas sympathy is degraded to a minor position with slightly negative connotations? Referring to a number of different descriptions of the two concepts, Gerdes (2011) indicates a historical line, where empathy seems to take over the role as a professional expression during the latter part of twentieth century. The concept of empathy is currently getting an increasingly detailed nuancing

within social work and psychological practice, at the same time as upcoming social-cognitive neurosciences are searching for steadily more detailed operational definitions. Empathy is the preferred term.

In an account of the term sympathy in *The International Encyclopedia of Ethics* (2013), Nancy E. Snow sums up the history of the term a) discussing the main arguments of the British philosopher David Hume's mostly ethical construction; and b) his continental European counterpart, Scheler's, more complex phenomenological construction described above; c) moving on to current scholars, such as Michael Slote's (2007; 2010) further development of the phenomenon based on arguments of the two forerunners, but now under the heading of empathy. Even though Snow prefers using the term empathy in her own writings, she concludes with pointing to the similarities:

In sum, sympathy is an important concept in the theory of ethics, playing roles in moral psychology and in ethics, social, and political theory. As a form of fellow-feeling, it is close in meaning to what we now call "empathy" (...). Sympathy appears in the works of contemporary feminists, such as Bartky and Noddings (Snow, 2013:7).

For Nel Noddings, former mathematics teacher and current educational philosopher, the term sympathy has a central place in her discussions of the challenge to care in school (1992; 2003). Her account of the phenomenon of care leads her to a nuanced discussion of the term sympathy, and thereby the sympathy-empathy discussion. Why is the sympathy-empathy discussion important? The following two reasons are central in this context:

- 1) Since the twentieth century, the concept of sympathy has been eagerly analysed and discussed, from the British empiricists, such as Hume and Mills, to the Continental European phenomenologists and current sociological, psychological, feminist, educational and other philosophers. Most contributions focus on the ethical aspect of sympathy. However, Scheler's phenomenological analysis still seems to be most holistic and nuanced, as he gathers within the generic concept of sympathy, emotional, psychosocial, cognitive and epistemological, as well as aesthetic and metaphysical forms or aspects in mutual dependency with ethics and love. Furthermore, with his phenomenological stance, he focuses on the subject or single person's immediate perception of the other (I – You). Accordingly, Scheler's analysis of sympathy contains a series of important aspects of the closely related phenomenon of care, which is at the centre of attention for Noddings.

- 2) Currently, there seems to be two parallel discussions, one with sympathy as a core concept, the other giving empathy a privileged status. Occasionally both concepts are discussed, often based on connotations contributing to lack of clarity and misunderstanding. Other texts show acceptance of the dynamic movements of concepts during history and between languages, cultures and professional discourses. These texts contribute to extended and enriched perspectives of the sympathy-empathy debate – including understanding of the related phenomena of care and sensitivity.

What are Noddings' (2002) arguments for favouring sympathy over empathy? She challenges the reader to think back on several situations when we find ourselves caring: What do we discover about ourselves in the caring encounter? Her answer is that we find us to be attentive and receptive. Receptive attention is an essential characteristic of a caring encounter. The carer is open to the cared-for and might be able to perceive and reflect upon it. The carer thus responds to the cared-for in ways that are potentially helpful. However, Noddings adds a necessary reciprocity: In order to be caring there must also be some recognition on the part of the cared-for. Her focus on our subjective perception of the caring encounter points to a phenomenological perspective. But what is the connection to feminism? Noddings describes the attention as receptive. This is contrary to what has been described as projective by other scholars. She argues that the focus on projection is “western and masculine” – and in line with empathy (Noddings, 2002; Smith, 2004; 2016).

Even though Noddings applies some of the aspects in Scheler's (1954) analysis of sympathy, references to Scheler are not found in her texts. Neither she nor other contemporary scholars within the sympathy-empathy discussions have covered the complexity of Scheler's concept and phenomenon of sympathy, even though some discussants refer to him – not even in the so-called conceptual history of empathy (Verducci, 2000). However, Noddings clearly perceives care and sympathy as something more than an ethical entity – the immediate emotional recognition is an important aspect in her philosophy as in Scheler's analysis.

One of Noddings' counterparts in the discourse on care, Michael Slote (2007), applies the term empathy. However, in spite of their differences in the sympathy-empathy discussions, Noddings (2010: 6) writes: “Slote and I have had conversations over the past few years about the use of empathy<sup>24</sup>”

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24 This article of Nel Noddings is written after the publishing of Michael Slote's book *The Ethics of Care and Empathy* (2007); a book that has been widely discussed and commented.

and she presents her new and revised view on the notion pointing out the following:

Today it is widely acknowledged that empathy involves what earlier thinkers called sympathy, an attitude of “feeling with” another, and etymologically, this definition of sympathy is certainly correct (Noddings, 2010: 6).

Interestingly, she uses the words “feeling with”, which seems to be compatible to the German word *emföhlung* mentioned above (see also Swan & Riley, 2012). Thus, Noddings incorporates the concept of empathy as equivalent to the notion “feeling with” that she has used earlier. She connects the term *attention* (receptiveness, openness, the action of taking special care of someone) to “feeling with” (*empathy*), and proceeds by discussing a number of complex aspects that need consideration in order to prevent the normative ethic of care to ignore “how things are”, because then it is unlikely to be taken seriously (Noddings, 2010). In this way, Noddings contributes to accept the term empathy as part of the debate on sympathy, attention and care.

How does this review of the sympathy-empathy debate contribute to a more fine masked understanding of the theoretical terms and practical phenomena of care and sensitivity?

- a) Scheler’s work (1954) has, through his account of sympathy reviled a symphony of interdependent emotional, cognitive, aesthetic and ethical aspects playing together in the relation between two or more single persons that constitutes conditions for care. His descriptions contain a series of diverse aspects of relational sensitivity. Scheler’s painstaking analyses deserve further in-depth explorations updated to our present focus on care- and resource based relation building between teacher and pupil, caregiver and child as well as between citizens, as Kristeva (2008) advocates for.
- b) Accepting current parallel use of the terms sympathy and empathy, Rogers’ statement on empathy is well fit as a summary and “working statement” with its focus on “as if”, in further discussions of sensitivity and preconditions for care:
 

“To sense the client’s private world as if it were your own, but without ever losing the “as if” quality – this is empathy ...” (Rogers, 1957: 99)
- c) The discussions of the terms sympathy and empathy are fetched from the following fields:

- ▶ Ethical discussions: (Noddings, 1992; 2002b; Scheler, 1954; Smith, 2004; 2016; Stoke, 1999; 2007)
- ▶ Cultural inquiries (Lu, 2017; Slote, 2010; 2016)
- ▶ Search for criteria for measuring empathy (Gerdes, 2011)
- ▶ History of ideas (Agosta, 2011; Gerdes, 2011; Snow, 2013; Verducci, 2000)
- ▶ Relational theory (Buber, 1947; Hundeyde, 2010; Hutchinson, 2004; Noddings, 1992; 2002a; 2002b; 2003; 2010; Rogers, 1957; 1975; Rye, 2005; 2007; Scheler, 1954; Shady & Larson, 2010; Zahavi, 2001; 2014; Zahavi & Overgaard, 2012)
- ▶ Education (Noddings, 1992; 2002a; 2002b; 2003; 2005; 2010; Sidorkin, 2000)

The debates have been mostly theoretical-philosophical, while some have focused the attention on practices.

- d) Nel Noddings' texts are humanistic phenomenological and feminist discussions within the broad field of educational practices. In her discussions she relates the term and phenomenon of sympathy and a series of other practice-related aspects to each other in a detailed description and argumentation for the practice of caring, as the following quotation is an example of:

The phenomenological analysis of caring reveals the part each participant plays. The one-caring (or carer) is first of all attentive. This attention, which I called "engrossment" in *Caring* (Noddings, 1984), is receptive; it receives what the cared-for is feeling and trying to express. It is not merely diagnostic, measuring the cared-for against some pre-established ideal. Rather, it opens the carer to motivational displacement. When I care, my motive energy begins to flow toward the needs and wants of the cared-for. This does not mean that I will always approve of what the other wants, nor does it mean that I will never try to lead him or her to a better set of values, but I must take into account the feelings and desires that are actually there and respond as positively as my values and capacities allow.

In a caring relation or encounter, the cared-for recognizes the caring and responds in some detectable manner. An infant smiles and wriggles in response to its mother's caregiving. A student may acknowledge her teacher's caring directly, with verbal gratitude, or simply pursue her own project more confidently. The receptive teacher can see that her caring has been received by monitoring her students' responses. Without an affirmative response from the cared-for, we cannot call an encounter or relation caring (Noddings: 2005: 3).

## Care and the ability to mentalise

Mentalising<sup>25</sup> is currently highly regarded and debated amongst the caring professions and researchers. Hundeide (2010: 11) connects mentalising to empathy in the following way:

To mentalize means to understand the other's reactions based on an empathetic experience of the Other's feelings, state and intentions – from “within”.

Jon G. Allen et al (2003: 2) offer an introduction of the notion of mentalising as well as of its applicability: “Mentalization refers to the spontaneous sense we have of ourselves and others as persons whose actions are based on mental states: desires, needs, feelings, reasons, beliefs and the like”. They point out that when we interact with others, we automatically base our responses on a sense of what underlies the other person's behaviour, namely, an active mind and a wealth of mental experience; thus, mentali is a natural human response. It may be added that most responses are based on our tacit knowledge and accumulated experience. However, the thoroughness of our empathetic – let us say, positive sensitivity – varies. In this connection it is wise to remember Rye's (2005) argument that while it is easy to interact positively with persons belonging to our own culture of interaction, meeting an individual whose interaction is perceived as strange, unpleasant or even threatening, may be a challenge. Julia Kristeva (1997; 2008), draws attention to indifference and fear as all too common aspects of the spontaneous attitude towards individuals perceived as strangers, whether they come from another culture, speak another language or have disabilities. She offers a psychoanalytic explanation to these kinds of marginalizing meetings, arguing that the perceived stranger confronts us with our anxiety about our own vulnerability and fear, or of “the stranger in ourselves” (Johnsen, 2010; 2014c). When this happens, Allen et al (2003) point out, we consciously mentalise. However, it may be more accurate to change the last sentence into a normative hope: This is when we should consciously mentalise, use our sensitivity, “count to ten” before we react and mobilise our ability to care for the individual involved. Working with people with various psychiatric disabilities, Allan is well aware that the ability to mentalise differs between individuals. Moreover, there is good reason to add that our capacity to mentalise appropriately depends

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25 The terms «mentalising» and «to mentalise» are written in several different ways, including different orthography between UK and USA English. In this text, mentalising and to mentalise is applied except in quotations, where the original orthography is used.

upon both the situation and cultural recognition. However, it is possible to learn to increase or extend this capacity. This is in line with the intentions of ICDP's Resource-Based Interaction Approach towards caregivers as well as the focus on care, communication and knowledge about the pupil "as a whole person" in the Curricular Relation Approach (Hundeide, 2010; Johnsen, 2014a; Noddings, 1992; Rye, 2005). Consequently, this is also in accordance with the continuous development of sensitivity when it comes to special needs educational counselors and educators as well as ICDP facilitators and trainers.

Is it possible to identify more specifically, what characterizes the ability to mentalise? Allen et al (2003) highlight three aspects. 1) Mentalisation is both an intuitive and explicit sense of coherence and continuity of oneself. 2) Mentalisation includes empathy and involvement and forms the cornerstone for meaningful, sustaining relationships. 3) Mentalisation is the key to self-regulation and self-direction. It is a key to engagement in reciprocal, sustaining relationships. Further, it helps individuals manage loss and trauma as well as distressing feelings such as frustration, anger, sadness, anxiety, shame and guilt, thus generating meaning, hope, and opportunities for resilience. The authors specifically mention the following abilities that may be strengthened through mentalisation:

- the capacity to *make meaning* out of adversity
- the capacity to sustain a positive outlook with *hope, initiative* and *acceptance*
- the capacity to experience the *mastery* derived from feeling *responsible* for our own behaviour
- the capacity to have a sense of *purpose* and engage in healing and inspiring rituals based on *shared values*
- the capacity to *communicate* and *solve problems* by seeking clarity and speaking the truth
- the capacity for *flexibility* and *humour*
- the capacity to feel *connected* and to give and receive *support*
- the capacity for open *emotional expression* and *sharing* of a full range of feelings and
- the capacity for *mutual empathy*, which allows us to see both our own and the other person's perspective (Allen et al, 2003: 4).

This list may be seen as containing many of the characteristics of a healthy, positive and philanthropic person, and thus not only constitutes the aim of mentalising, but also of care, sensitivity and other related characteristics in

addition to the ultimate intentions of resource-based approaches within education and upbringing. However, the crucial practice-related question following this list is how to develop the ability of deliberate, conscious mentalising. Allen and associates offer four recommendations in their detailed overview article (2003).

- 1) The single most important factor in fostering mentalisation is a secure attachment relationship — a close emotional bond.
- 2) Having confidence that the attachment figure can be relied upon, if needed.
- 3) In therapeutic interactions, increase one's ability to mentalise is commonly done through identifying and labelling feelings; that is, the skill to feel and think about feeling at the same time. This is also called the ability to mentalise emotionally or developing "metalized affectivity" – a concept introduced by another prominent scholar within attachment and mentalisation, Peter Fonagy.
- 4) Fostering mentalisation aims at fostering the capacity for mutuality — meeting of minds — that both stems from secure attachments and makes secure attachments possible.

Again, when it comes to what Allen and associates call fostering mentalising, we recognize the ideas and practical recommendations related to care and sensitisation. The recommendations resemble Nodding's urge for care, Rogers' focus on empathy and Buber's line of arguments concerning communication and the dialogical relation. In short, Allen et al's (2003) detailed overview of the idea and practice of mentalising seems to incorporate other related concepts discussed here, as it stands out as an overarching concept.

In a previous article Fonagy and Target (1997) offer a review of relevant studies exploring the possible relationship between attachment processes and the child's development of the ability to envision mental states in themselves and others. Their assumption is that the ability to mentalise, interpreting behaviour in terms of mental states – or to have "a theory of mind" – is a key determining factor for self-organization, and that this is acquired in the context of the child's early social relationships. The article adds important aspects to the relationship between resource-based approaches to interaction and the ability to mentalise. Fonagy and Target (1997) describe mentalisation as the reflective function that enables a child to "read people's minds". Young children develop this reflective capacity, enabling them to interpret other people's behaviour and obtain a conception of others' "beliefs, feelings, hopes, pretence, plans and so on" (Fonagy & Target, 1997: 679).

What are the prerequisites for developing the ability to mentalise? Referring to a number of studies, Fonagy and Target (1997) argue that a secure attachment between caregiver – here represented by the mother – is a prerequisite for developing this metacognitive ability. Further, they point out three types of interactive or mediational models based on this secure caregiver-child relationship in infancy that contributes to the development of the ability for self-organisation as children grow up:

- a) Cooperative interaction between caregiver and child or between children, such as joint pretend play, show what they call superior mentalising and responses that indicate emotional understanding.
- b) Talking together, especially about reasons for people's actions and feelings, is related to relatively early development of the abovementioned reflective function or mentalising capacity.
- c) The third mediational model is peer group interaction, whether it happens between siblings or in other group constellations. This kind of interaction enhances theory of mind performance.

There are many aspects of Fonagy and Target's account of the relationship between secure attachment between caregiver and child, development of the ability to mentalise and organisation of self, which closely links mentalising to resource-based interaction approaches. One of the ICDP themes – helping the child to learn self-regulation – is one of Fonagy and Target's major areas of study (1997) in which their argumentation is documented by studies and useful examples that may also be applied in practical ICDP training. This article focuses on the crucial role early attachment plays in the development of young children's ability to mentalise. However, they also indicate that this is a developing ability along with other learned and developed abilities, referring to studies of play in kindergarten.

The vast number of texts produced by Allen, Fonagy, Target and associates discussing mentalising shows that they consider this ability to develop further into adulthood and that limited mentalising capacity may also increase through therapy.

## **Bounded eclecticism in theory and practice**

Care and sensitivity in upbringing and education is at the core of this text, which offers an introduction to these and related core concepts, using two resource-based interaction approaches as examples; the *Curricular Relation Approach*

(Johnsen, 2001; 2014a) and the *Resource-Based Interaction Approach* (Hundeide, 2010; Rye, 2001; 2005). The aim is to account for an initial exploration based on the following questions: What is really meant by the two important notions of care and sensitivity? How are they related to other important concepts and research-based interaction traditions? In what way can they contribute to the practice of positive, resource-based approaches in teacher-pupil and caregiver-child interactions? How are these concepts connected to education, special needs education, inclusion and other related fields?

The question of the meaning and applicability of the concepts of care and sensitivity has been attempted answered through a literary search in order to explore how they are related to other important concepts within research-based interaction traditions. As a preliminary result, the three concepts of sympathy, empathy and mentalisation are arrived at as related terms contributing to shed light on interpretations and use of care and sensitivity – along with a selection of other closely related concepts.

As a starting point for a brief compilation, empathy is one of the main concepts in Hundeide's ICDP facilitators' handbook (2010). The humanist psychologist, Carl Rogers' introduction of the concept led to widespread application within human-related disciplines. However, in spite of its extensive use, the concept is controversial even within the ranks of humanists, including educational philosopher Martin Buber and feminist humanist, Nel Noddings. The phenomenological philosopher Max Scheler's (1874 –1928) detailed analysis of the concept of sympathy has influenced debates about the two terms' pros and cons, sympathy and empathy, and references to his texts are widely found. Currently, debating scholars seem to have arrived at a consensus concerning Rogers' brief description of empathy – containing the "as if" – is applicable: "To sense the client's private world as if it were your own, but without ever losing the "as if" quality—this is empathy ..." (Rogers, 1957: 99). The debates have, however, highlighted a number of additional related concepts that may support a dynamic and applicable understanding of the concepts of care, sensitivity, empathy and sympathy. Thus, Buber adds inclusion, dialogical relation and the existential I–Thou relationship. The ethics of care is at the centre of Noddings' educational philosophy. She connects attention and "feeling with" (*einfühlung*) when she currently accepts including the term empathy, amongst other terms, concerning comprehensive care for the pupil as a child and whole human being. Similar to other debaters referred to in this article, she applies phenomenology in her analysis of caring relationships.

Mentalisation is the third main concept discussed in this text. As argued above, it is closely related to sensitivity, sympathy and empathy. Both the articles of Allen and associates (2003) and those of Fonagy and Target (1997) are major sources for this introductory review of the concept. They establish the premise that while the ability to mentalise may be a natural, or tacit, automatic perception of another fellow human being, it may also be conscious and reflected. Moreover, referring to Rye (2005) and Kristeva (1997; 2008), it may also be argued that the conscious form of mentalisation differs from person to person. There is general agreement among the authors referred to here that the conscious ability to mentalise may increase through different kinds of awareness raising and therapy. As their articles show, the argumentation for mentalisation derives support from humanistic scholars such as Rogers, from attachment research such as Bowlby and Stern, from Vygotsky's cultural-historic focus on the interaction between teacher and learner and between caregiver and cared-for as well as from psychoanalysis.

**Bounded eclecticism in theory.** As referred to, when taken as a whole, the discussions above draw their arguments from a set of theoretical traditions. These are mainly humanism, existentialism and phenomenology, culture-historic theory and related communication and mediation theories, attachment theory, psychoanalysis, feminism and the ethics of care. All of the applied articles in this text are referring to more than one of the theoretical traditions. Drawing upon several theories or traditions, they offer complementary, eclectic insight. Basically, none of the applied theories contradicts each other; in this way, they do not represent an accidental composition, since they have what Wittgenstein (1953 in McShane, 1991) argued, "family resemblance", being connected by several overlapping similarities but no feature that is common to all. If any characteristic should be highlighted as a possible common denominator, it would be Buber's focus on the I-Thou relationship. Thus, it is fair to assign this cohesive discussion the characteristic of a bounded eclecticism in theory.

**Bounded eclecticism in practice.** There is an Icelandic saying that "Words are the beginning of everything (Orð eru til alls fyrst)." This discussion of care and sensitivity has generated a number of related "words" or concepts, all containing similarities and nuances as shown above, which in turn may serve to increase the depth and nuances of understanding as well as clarify practice. The majority of the related concepts mentioned in this article are the following:

Empathy, attention, attachment, the “I-Thou” relationship, dialogical relation, inclusion, sympathy, *einführung* – insight – compassion, “feeling with”, mentalising, involvement, acceptance, communication, flexibility, give and receive connection and support, emotional expression and sharing.

As expected, there is “family resemblance” between the concepts, even though, as demonstrated above, there may be strong disagreement regarding some of them, as shown above. The diversity and nuances along with the relationships constitute a sound basis for further specification and implementation of care and sensitisation in practice.

Where, then, is awareness raising of care, sensitivity and related activities applied? Limiting the answer to the scholars mentioned in this article, there are four main arenas: education and special needs education, counselling and therapy. Several authors discuss awareness raising of empathy, mentalising and related terms within therapy, such as Rogers, Allen, Fonagy and Target – even though they also discuss the topics connected to education. Education is of main interest for Buber and Noddings. Care, including sensitisation, is a core arena of the practice-oriented Curriculum Relation Approach (Johnsen, 2001; 2014a; Johnsen et al, 2020), whereas care, sensitisation and awareness raising are at the center of ICDP’s Resource-Based Interaction Approach (Hundeide, 2010; Rye, 2001; 2005). Counselling is an important arena for special needs education, educational-psychological services and other services aiming at supporting education as well as childrearing in institutions and families. Thus, teachers and special needs educators working in kindergarten and school as well as caregivers in families and institutions are among the main target groups for awareness raising, which takes place on both an individual and group basis. ICDP dialogue groups are examples of low-threshold counselling in awareness raising groups led by trained facilitators (Hundeide, 2010). Focus on care and sensitisation, sympathy, empathy and mentalisation is a fundamental aspect (or should be?) even within an extended number of professions such as healthcare, psychiatry and psychology, social work, education and special needs education, to mention some.

## Care, sensitivity and relational traditions

The study of human relations has been gaining such a high degree of attention that new traditions are developing within psychology and relational psychology, relational education or relational pedagogy. More specifically, within the educational sciences, relational pedagogy draws attention towards theoretical

discussions concerned with ontological, epistemological and ethical considerations. Buber's (1947) subject-subject relationship, and Noddings' (2002) ethics of care, are presented as pioneering thoughts – and the developing theory is located in the humanistic-phenomenological tradition (Sidorkin, 2000; Vecks, 2013). Sidorkin lists different types of relationships in the classroom, presenting the following characteristics: stereotypical – exploratory – cooperative – accepting – respecting and – mutual relations. Through doing so, Sidorkin takes a step further away from philosophical reasoning toward prescribing researchable relational qualities. He also emphasizes that interpersonal relationship is based on mutual trust, respect and care. Further, Bingham and Sidorkin (2004) have published an overall presentation of relational pedagogy in the anthology *No Education without Relation* in which care and democratization are given ample space with representatives such as Noddings, Biesta and other researchers.

Relational pedagogy explores, recommends and criticizes, posing questions such as: Who are “all” in relational pedagogy? Does the discourse only revolve around ordinary educational topics? Are learners with different levels of mastery and specific educational needs included? Are all kinds of relations positive? How are relationships with strangers? Following in Noddings' footsteps (2003), Hutchinson (2004) and McDaniel (2004) apply relational pedagogy in their criticism of marginalization of minorities within the topic of cultural diversity. Their criticism does not apply to children with special needs. However, Kristeva (1997; 2008) extends her analysis to a specific focus on conditions for the disabled in her psychoanalytical-based criticism. She takes the same point of departure as Hutchinson, McDaniel and Noddings – the stranger – discussing how the disabled are perceived as strangers when encountering members of the majority population; as aliens that evoke unpleasant feelings in members of the majority, reminding them – consciously or unconsciously – of their own vulnerability and powerlessness. The consequences are invisibility, marginalization and discrimination – including their schooling. However, Kristeva believes that this majority mentality can be reversed. She argues for a humanistic ethical-political program reminding her fellow French citizens of French liberation's motto during the “childhood” of modernism: Liberty, Equality, and Fellowship – adding a fourth motto recognizing a common mentality of Vulnerability in all citizens (Kristeva, 2008; Johnsen, 2014c; 2015). Additionally, Biesta, one of the participants in Bingham and Sidorkin's anthology (2004), draws attention to the relationship between democracy, education and the issue of inclusion (Biesta, 2007). Biesta argues that inclusion is a core value of democracy and that the ideal

democracy includes every individual – in education as well as in society at large. He bases this argument on what he calls a wide – not narrow – understanding of necessary requirements for inclusion and democracy building.

## **Relational pedagogy in theory and practice - curricular relation approach towards inclusion**

This text started intending to answer the following questions: How have resource-based approaches been described? What do they mean? How have ideas about resource-based approaches contributed to shaping educational and special needs educational research and professional identity? And how have they been transformed into useful knowledge and experience? The answers have taken as a point of departure two main concepts connected to a resource-based approach to education, namely care and sensitivity, and discussed the concepts in light of a number of related terms in theory and practice. Two different yet related approaches are applied as illustrations of how care and sensitivity are being incorporated in educational and special needs educational practice, the *Curricular Relation Approach* and ICDP's *Resource-Based Interaction Approach*. It is already indicated above how the Resource-Based Interaction Approach, including its universal focus on communication and mediation, contains many of the concepts discussed here. Several of them are even used in ICDP's facilitators' handbook. The Curricular Relation Approach has been developed as a detailed educational and special needs educational tool to tailor-make the teaching-learning-development process for individual pupils within the community of the class – in other words a tool in developing inclusive practices. How have care and sensitivity earned a place in this approach? Curricular or didactic relational approaches highlight care and relational communication as fundamental aspects in the planning and practice of individual curricula within the classroom community. The approach may be described as relational from two perspectives: a) all eight aspects are related to each other in order to create a holistic curricular plan and practice; b) it is dependent upon or contributes to a resource-based relationship between educator and pupil – master and novice – in the process of teaching, learning and development. All eight aspects of the approach contribute to this double relational perspective: knowing the pupil and pupils – assessment of teaching and learning – educational intentions – educational content – class organization and methodology – communication – care – context or frame factors.

Finally, even though the main aspects of care and human relational communication are the most obvious, all eight aspects or arenas relate to one another in an educational setting (Johnson, 2014a). Caring and interpersonal communication can prevent overriding and promote dialogue between school and pupil with the aim of constructing a joint process of teaching and learning in accordance with the pupil's capabilities in the classroom context, indicating the necessary human relation traits of inclusive education.

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# Qualitative Research – Does it work?

## *A Discussion of Qualitative Educational Studies and Generation of Evidence*

Berit H. Johnsen

### Introduction

How is it possible for a qualitative study to generate evidence-based knowledge about inclusive practices in classroom settings? This is a prominent question in current research-methodological discourse in general and a matter of disagreement within the psychological, educational and related sciences. There is therefore good reason to discuss the question in connection with the joint research project *International Classroom Studies of Inclusive Practices – Comparing teaching-learning processes*<sup>26</sup> (Johnsen, 2013; Johnsen et al, 2020; WB 04/06, 2006) with participating research teams from the Universities of Belgrade, Ljubljana, Sarajevo, Skopje, Tuzla, Zagreb and Oslo. In order to place the discussion within the context of this project, the article begins with a brief summary of the research.

**Inclusive Practices** consists of seven classroom studies with the common issue:

How does school teach in accordance with the pupils' different levels of mastery and needs for support in the learning process (recourses, barriers and dilemmas)?

The studies have different research foci located within a joint didactic-curricular approach consisting of seven main aspects of teaching – learning – developmental processes on micro level (Alexander, 2009) focusing on the individual

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26 Hereafter the project (Johnsen, 2013) is referred to as *Inclusive Practices* and Alexander (2000) *Five Cultures*.

pupil in the community of the class: knowledge of the pupil/s – assessment educational intentions – educational content – methods and organisation – communication – care. The seven aspects are embraced by the eighth main aspect of context, which connects the classroom studies with their different contexts on macro level, thus facilitating conditions for comparison (Alexander, 2000; 2004; 2009; Johnsen, 2013; 2014b). The international classroom research is characterized by methodological flexibility within the common denominators of the joint project plan as described in Johnsen’s (2014a) summary of *Methodological Diversity in Common Explorations*. The article documents the research teams’ application of mostly qualitative or mixed-methods approaches. This actualises the question of whether qualitative research contributes to evidence-based practice. As indicated, the seven participating universities are situated in six countries “on the south-eastern and north-western outskirts of Europe”. The joint project is based on a common international ethical-political idea or principle about educational inclusion (Johnsen, 2013; UNESCO, 1994). The goal is to explore the development of inclusive practices, focusing on resources and potential dilemmas and obstacles. As indicated, the university teams have a high degree of freedom concerning their a) research methodology; and b) choice of research focus concerning the elementary school. Thus, the purpose of this article is to discuss the question: Qualitative Research – Does it work?” in light of ongoing “evidence-debates”, using the abovementioned project as an example.

## **How is it possible for a study to generate evidence-based knowledge about “what works” in education?**

Why is this a timely question? And, what is meant by evidence-based knowledge or practice? Answering the first question, currently, there is a rising awareness and desire amongst politicians and civil servants to base professional practice on research evidence as a way of ensuring efficient services. Thus, the *Norwegian Directorate for Children, Youth and Family Affairs* (Bufdir) emphasizes that recommended programmes and approaches be evidence-based. Amongst the many links on evidence-based practices found on their homepage is the report from the UK Department for Education (Wiggins, Austberry & Ward, 2012) *Implementing Evidence-Based Programmes in Children’s Services: Key Issues for Success*. Using classic snowball method, another similar major report focusing on child welfare services is found, namely UK politician Graham Allen’s (2011)

independent report to Her Majesty's Government on *Early Intervention: The Next Steps*. The two reports strongly indicate that focusing on evidence-based knowledge is an international trend – at least in Western societies. Turning to texts within the field of education, evidence-based knowledge is at the centre of a number of anthologies, conference presentations and articles written by educational administrators, stakeholder groups and researchers. In the USA, the U. S. Department of Education follows this trend (Gall, Gall & Borg, 2007). In order to help practitioners assess whether a research project fulfils the criteria needed to be accepted as an evidence-based guide to educational practice, they have published the compendium entitled *Identifying and Implementing Educational Practices Supported by Rigorous Evidence: A User Friendly Guide* (U. S. Department of Education, 2003).

What, then, is meant by evidence-based knowledge or -practice? A fast and informal web search for relevant texts containing the word “evidence-based” in the title reveals that in a majority of these texts, there is no description or clarification of this central concept. On the contrary, its meaning seems to be taken for granted at the same time as it points to a variety of different connections. However, the U. S. Department of Education's guide (2003), mentioned above, gives a clear-cut and concrete description of “what works”. Similarly, Allen's (2011) previously mentioned report presents a set of standards for evidence-based statements developed by a team of experts from renowned institutions on both sides of the Atlantic. Thus, a prominent dimension called evaluation quality is described as:

“... favouring those Early Interventions that have been evaluated to a very high standard using the most robust evaluation methods, such as randomised controlled trials or quasi-experimental techniques, and ideally summarised in systematic reviews” (Allen, 2011: 69).

This conceptual description delimits the field of applicability to natural-science inspired methodology. Where does that leave research based on qualitative methodology?

Educational philosopher Tone Kvernbekk (2013) presents an overview of the use of the term “evidence-based” in educational research. She starts by pointing out that the terminology is suitable to explain “what works” for both learned and laity. The concept may function as a bridge between funded knowledge in research reports and the conventional wisdom of non-professionals<sup>27</sup>. Kvern-

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27 The two concepts of “funded knowledge” and “conventional wisdom” stem from John I. Goodlad's classic book on Curriculum Inquiry (1979).

bekk points to educational scholar David Hargreaves as the architect of the view that "...to gather evidence about what works in what circumstances is the whole point of evidence-based research (1996b in Kvernbekk, 2013: 64). He maintains that educational research should improve teaching outcomes. But, how is it possible to determine these outcomes? Hargreaves argues that outcomes are generally perceived as measurable outputs found through studies based on randomised controlled trials. In this way, he places his scientific point of view within quantitative research methodology; as Allen (2011).

Looking back to my student years at the University of Oslo in the early 1970's, two decades before Hargreaves argued in favour of his "what works" position, the natural science based quantitative approach was *the* privileged methodology at the Department of Education, which was then strongly influenced by American educational science. F. N. Kerlinger's methodological handbook *Foundations of Behavioural Research* (1964) was obligatory reading. His primary focus was on collecting and analysing generalizable data that could serve to explain, predict and control educational processes, as Johanningmeier and Richardson (2008) sum up in their historical work on educational methodology. As another example, James R. Lewellen (1977) is amongst the supporters of Kerlinger's ideas. He is concerned with refining social concepts – such as power, conflict, alienation and socialisation – into measurable constructs in terms of observable properties that can be measured.

## **How is it possible for a qualitative study to generate evidence-based knowledge about practices in classroom settings?**

The summative review above provides scarce opportunities for qualitative studies to be accepted as evidence-based. However, a few years ahead of Lewellen's article (1977), John Martin Rich (1975:329) argues that "... the prevailing model, which we call "scientific behavioural" thinking, is not entirely appropriate for fruitful thinking and research in education". Instead, he offers an alternative approach to research on educational practice, namely an idiographic holistic approach not focusing on "uniformities and regularities of a whole class of objects", as done by quantitative research – but on understanding the individual pupil "as a unique being, rather than a specimen of a class" (Rich, 1975: 330). Rich presents an alternative approach to understanding educational practice, or the teacher-pupil relationship, based on Martin Buber's (1947) humanistic "I-Thou"

philosophy comprised of his quest for an inclusive relationship and comprehension of the pupil as a holistic and complex individual within his or her cultural context (Alasuutari, 2010; Johnsen, 2014b; Rich, 1975). Rich outlines a normative approach to educational research, making use of observation, conversation or open interviews, contextual studies and the researcher's experience of empathetic and caring insight, into individual pupils' observable as well as internal set of "values, aims and aspirations". In this way, he offers an alternative approach to Hargreaves in the search for "what works" in education. In a more recent and frequently cited article, Norman K. Denzin (2009) presents a critical overview of the two traditions. His critique of quantitative evidence tradition may be summarised in three main aspects.

- 1) He strongly opposes the research-political monopoly that is given to quantitative research tradition following Hargreaves' and Kiplinger's position by several funding agencies, professional associations and journals. Consequently, it is given the power to control the definition of evidence.
- 2) In line with Rich (1975), Denzin argues that evidence is never morally or ethically neutral, as seems to be the view of many followers of the quantitative evidence tradition.
- 3) He criticises the narrow and conformative basic principles underlying this scientific tradition in contrast to qualitative and interpretive scientific tradition. Where quantitative tradition focuses on uniformity under one set of quality criteria for evidence, qualitative tradition focuses on flexibility in quality criteria that describes evidence adapted to the variety of methodological traditions. Where the quantitative stand favours evidence fit for prediction, qualitative traditions favour the kind of evidence contributing to understanding, thoroughness and awareness of nuances and connectedness to different interpretations. According to qualitative tradition, evidence and data need interpretations and re-interpretations when applied in relation to different research questions, methods and analysis.

Kvernbekk (2013) discusses different viewpoints concerning what is legitimate evidence-based knowledge and the idea about "what works", from Hargreaves' delimited claim for quantifiable randomised controlled trials, to opponents', such as Gert Biesta's rejection of the applicability of evidence-based knowledge at all. Kvernbekk argues that Hargreaves' stand seriously restricts the content and function of the concept of evidence. The basic meaning of evidence is "... that which supports or justifies views, theories, beliefs – and by extension,

teaching strategies or interventions. This function can be performed not only by data, but also by experience, facts, narratives and other reasons” (Kvernbekk, 2013:70-71). In this instance, while Kvernbekk is in line with Denzin (2009), she supports the argument that it is better for educational practice to be based on evidence – in this broad understanding of the term – than to rely on habits or arbitrary opinions.

As may be observed by the above arguments, Kvernbekk’s position is similar to mine. Research findings obtained by qualitative methodology – be it action research, case studies, narratives or related research designs – as well as findings through the use of quantified data or mixed methods, all contribute to generate new knowledge about different aspects of the complex process of teaching, learning and development. These are aspects that must be considered in view of their context and the context of the practicing teacher and special needs educator (Denzin, 2009; Foreman-Peck & Murray, 2008; Griffiths & Macleod, 2008; Webb & Ibarz, 2006). There is no single methodology that can claim ownership of “the truth”. On the contrary, what counts as evidence is by no means clear-cut, as it depends upon the intended meaning or epistemological foundation of the research question as well as methodology, analyses and interpretation. Different philosophical approaches shed light on different aspects of a phenomenon through their systematic gathering of evidence. In this way, different methodologies contribute to a multifaceted understanding that may advise politicians and practitioners in their search for high-quality answers to their educational questions (Kvernbekk, 2013; Oancea & Pring, 2008).

The increasing use of qualitative studies is accompanied by desires “to develop the quality of qualitative research”. This is important for the main example applied in this article, *Inclusive Practices* (Johnsen, 2013; Johnsen et al, 2020), as well as for all other qualitative studies within education and other sciences. As an example, in addition to the educational sciences, qualitative studies are increasing within medical research, which is a field where quantitative methodology has traditionally held a very strong position (Collingridge & Gannt, 2008). Accordingly, refining qualitative methodology is a topic of a growing number of medical research articles, including the question of evidence. Thus, McBrien (2008) recommends four techniques that contribute to the validity of qualitative studies, namely member checking, peer-debriefing, audit trial and reflectivity. He argues that they all contribute to enhancing the research process’ credibility, trustworthiness and rigour as well as its outcome; therefore, they are well suited as criteria for evidence-based qualitative studies. Several scholars

discuss and refine techniques in order to develop “the quality of qualitative research”; amongst them the three outstanding scholars, Denzin (2009), Stake (1995; 2006) and Creswell, currently along with Poth (2018). Lincoln & Guba, also outstanding pioneers, direct attention on two complementary main concepts that bring together a number of aspects answering the question of evidence, namely trustworthiness and authenticity (Creswell & Poth, 2018; Guba, 1981; Johnsen et al, 2020; Lincoln & Guba, 1986; Morrow, 2005; Schwandt, 2007). The importance of their contribution lies in their systematic compilation of concepts, descriptions and examples that contribute to develop a conceptual map specifically dedicated to verifying the quality of qualitative studies. Guba and Lincoln’s “map for evaluating the quality of qualitative research” is selected as a main approach in *Inclusive Practices* (Johnsen et al, 2020) because of its a) comprehensive and systematic compilation concerning trustworthiness; as well as its b) daring introduction of authenticity as a possible way to further develop the uniqueness of how qualitative research contributes to illuminating “what works”. Others have already used most of the terms in their compilation, and many scholars continue to develop the applicability of terms introduced by the two pioneers. Guba (1981) describes the main traits or criteria for trustworthiness as a) credibility, b) confirmability, c) dependability, and d) transferability, while the main characteristics of authenticity are described as i) fairness, ii) ontological authenticity, iii) educative authenticity, iv) catalytic authenticity, and v) tactical authenticity (Lincoln & Guba, 1986). In the following section, each trait is briefly clarified using examples from *Inclusive Practices* (Johnsen, et al, 2020).

**Trustworthiness** concerns if and how all aspects of a qualitative study, from research issue to report, contain a holistic and nuanced presentation of the phenomena in focus; whether it is worthy of being trusted as evidence. It consists of four main traits, each comprised of tools or techniques used to judge the trustworthiness of any particular study (Guba, 1981; Johnsen et al, 2020).

**Credibility** is the most comprehensive of the four aspects. It concerns “the truth value” of a study’s phenomenon, or if a study is perceived as “true”, or valid, by all of its participants and stakeholders, from researchers to practitioners. Credibility concerns all phases in a study; planning, implementing and writing a research report. A number of techniques, or tools, are used in order to establish credibility in each phase. These include establishing structural corroboration, close collaboration, prolonged engagement, triangulation, thick descriptions, member reflections and testing out the correspondence between the seven sin-

gle studies and joint report (Creswell, 2007; Creswell & Miller, 2000; Gall, Gall & Borg, 2007; Geertz, 1973; Gill, Gill & Roulet, 2018; Guba, 1981; Moon et al., 2016; Northcote, 2012; Tracy, 2010).

In *Inclusive Practices* credibility is considered in the preparation and planning phases, theoretical foundation and methodological choices. However, the main focus is on the process of analysing and compiling the seven individual studies produced by research teams in six European countries into one joint report. Thus, credibility is evaluated in the following phases of the research process:

- 1) *The question of credibility of preparation and planning* concerns whether the intended research purpose and construction of the joint research project are perceived as meaningful to all participants (Moon et al., 2016). This includes what Tracy (2010) points to as a worthy topic, or, if it is perceived as relevant, timely, significant, interesting and useful (Johnsen et al., 2020). Three aspects are accounted for here; a) the preparation phase, b) the joint planning phase and c) the team planning of each individual study.
  - a) The preparation phase takes place in an innovation project between the universities of Sarajevo, Tuzla and Oslo, focusing on individually adapted education and inclusion (Johnsen, 2007; SØE 06/02);
  - b) Planning the international comparative classroom study towards inclusion takes place in the application period for inter-European cooperation (Johnsen, 2013a; WB 04/06, 2006). The project plan contains a joint research question and structure of the shared research based on seven didactic-curricular main aspects that constitutes a joint umbrella, or frame, for studies, comparative analysis and discussions of the inner activity of schooling, otherwise called the internal micro dimension (Alexander, 2000; Johnsen, 2013a).
  - c) Each research team develops their own plan based on an eclectic selection of theory- and research traditions within the joint research frame. Are the seven individual study plans and their relation to the joint research plan perceived as meaningful? The joint final research report strongly indicates that they are.
- 2) *The credibility evaluation of the main implementation phase.*
  - a) Each team conducts their study;
  - b) Six ambulating workshops are held with international researchers participating in discussions focusing on central methodological and theoretical aspects of the seven studies;
  - b) Visits to participating elementary schools are made.
  - c) Sharing the workshops, joint methodology readings and texts describing and discussing the seven research plans and implementation, strengthen the joint understanding between the research teams.

- 3) The main assessment of credibility takes place in *when collecting, analysing and compiling the joint international comparative report* in a process consisting of eight steps of compiling and revising drafts through a series of email exchanges, a discussion seminar and continuous member checks, revisions and writings, concluding with joint peer or colleague reviews.

The following tools, or techniques, for judging credibility are applied during this process; a) close cooperation; b) prolonged engagement; c) establishing structural corroboration; d) triangulation; e) member reflections; f) checking correspondence between single studies and joint report; g) audit trial; h) and to a lesser degree external peer review (Creswell & Poth, 2018; Creswell & Miller, 2000; Gall, Gall & Borg, 2007; Geertz, 1973; Gill, Gill & Roulet, 2018; Guba, 1981; Johnsen et al, 2020; Lincoln & Guba, 2007; Moon et.al, 2016; Northcote, 2012; Stake, 1995; 2006; Thomas, 2017; Tracy, 2010). Credibility is by far the most extensive aspect of trustworthiness; indeed, this assertion has been discussed and developed by a considerable number of scholars.

**Confirmability** focuses attention on whether reported findings answer the research issues or are result of research bias. The question is if it is possible to confirm the truthfulness of the research. One criterion for confirmability is therefore that it must be possible to replicate a similar research process and come to similar conclusions – to the extent that this can be realized in qualitative studies within different contexts. How is it possible to account for possible biases? Four techniques are used in *Inclusive Practices* to account for the different interpretations, operationalisations and choices in order to reveal as clearly as possible the research process: a) Accounting for the underlying assumptions leading to the construction of the research. b) Ensuring that interpretations and conclusions are grounded in evidence; c) Giving detailed methodological descriptions. d) Making use of internal and external auditing (Johnsen et al, 2020).

**Dependability** applies to the findings' stability and consistency. Qualitative studies are not suitable for direct replications, but accuracy, logical consistency and possibility of an approximately similarly perceived research process are hallmarks of trustworthiness (Anney, 2014; Armstrong, 2010; Gill, Gill & Roulet, 2018; Guba, 1981; Moon et al., 2016). Dependability auditing is a major assessment technique that consists of external peer audits' review of the entire research process. Several methods contribute to assessing dependability, such as a triangulation, stepwise replications, also called "dependability audit", cod-

ing-re-coding strategy; peer examination and audit trial. The dependability of *Inclusive Practices* is confirmed through the eight steps described above as a credibility check that contains collecting, analysing and revising processes of the seven studies based on the shared didactic-curricular main aspects. The stepwise procedure consists of a series of internal audits (Johnsen et al, 2020).

**Transferability.** While dependability focuses on the research process and findings, transferability mainly concerns whether or not the results can be transferred to other contexts. Geertz' (1973) thick descriptions, where findings are described in their context are therefore the main criteria used to determine truthfulness of results; they are also used for determining credibility, as mentioned above. Transferability has been compared to external validity or the validity of applying a qualitative study's conclusions outside the context of that study. Thick descriptions may involve illuminating all parts of the research process, from background data, phenomenon, research questions and choice of methods, situations, informants and data collection, to findings and compilation of the final report. Hence, thick descriptions based on contextual disclosures contribute to transferable truth-value and pave the way for replicating the study in other settings. The contextual descriptions of the seven studies that make up this international comparative research are therefore crucial for transferability. (Anney, 2014; Gill, Gill & Roulet, 2018; Guba, 1981; Johnsen et al, 2020; Korstjens & Moser, 2018; Moon et al, 2016; Schwandt, 2007; Shenton, 2004).

**The authenticity perspective** draws attention to a dimension that is unique for ideographic, qualitative research and is characterized by its "... relativist ontology and an interactive, value-bounded epistemology" (Lincoln & Guba, 1986: 20). Hence, authenticity applies to value awareness. In their introduction of the authenticity perspective of methodological rigor, Lincoln and Guba (1986) admit that they have not yet developed this perspective fully, especially when it comes to assessment methods. However, they suggest five aspects of authenticity; fairness, ontological authenticity, educative authenticity, catalytic authenticity, and tactical authenticity. Even though the authenticity quality perspective is not applied in a large number of qualitative studies, several scholars are engaged in further discussions about its development and use (Lincoln & Guba, 1986; Manning, 1997; Schwandt, 2007; Shannon & Hambacher, 2014). In the following, the five criteria of authenticity are briefly described using examples from *Inclusive Practices*.

**Fairness:** Among the five aspects of authenticity, fairness is considered the most outstanding. It is based on the following line of arguments; i) that qualitative or naturalistic studies are value-based, ii) that they are constructed in accordance with differing value systems, and iii) that an important part of qualitative research is to account for its value structures. Consequently, it is fair 1) that the researcher explicitly discusses the inquiry's value framework and, as Manning (1997) argues, 2) that all participants have a voice in the inquiry. Manning (1997) also presents an extensive list of tools to assess the two aspects of fairness. Several of these assessment tools are also used in assessing trustworthiness. Thus, the same assessment tool, or technique, considers several aspects of research quality, as also occurs in the presentations of trustworthiness. The internal peer debriefing in the 8-step process of the joint research report's compilation of *Inclusive Practices* (Johnsen et al., 2020) is possibly the most prominent example of this, being a quality criterion related to credibility, fairness and several other aspects of "goodness of qualitative research". The two main aspects of fairness consider a) fairness as describing and discussing the research's value framework, and b) that all participants have a voice in the inquiry. In *Inclusive Practices* the underlying value framework is discussed with a focus on; a1) theoretical considerations; a2) international human rights principles; and a3) underlying basic value considerations when focusing on a critical analysis of good examples of educational inclusion; b) all participating researchers have a voice in the compilation and revision process of the abovementioned 8 steps leading up to the joint research report (Johnsen et al, 2020). However, in each of the seven studies, there are different participants and stakeholders whose voices are important and fair and should therefore be accounted for in each of the individual studies.

By applying the four authenticities – ontological-, educative -, catalytic- and tactical authenticity – Lincoln and Guba (1986) shed light on nuances of increased understanding, applicability and societal relevance with respect to qualitative studies (Johnson & Rasulo, 2017; Lincoln and Guba, 1986; Schwandt, 2007; Shannon & Hambacher, 2014). Thus, **ontological authenticity** concerns whether or not participants in a study gain increased experience of the complexity of a phenomenon, such as in *Inclusive Practices*, when they experience a) the significance of the interrelations between the seven didactic main areas of the didactic-curricular relation approach (Johnsen, 2014b) – the pupil/s – educational assessment – educational intentions – educational content – methods and classroom organisation – communication – care – context /frame factors –,

as well as relevant sub-areas, in practicing individually adapted teaching for all pupils in the community of the class; b) and when they apprehend the important role that the close and wider context plays in classroom practices. When participants also become aware that the process of the inquiry has led to their own reconstruction towards gaining an increased understanding of the complexity of the practice mentioned above, as well as different value systems, they have at that point acquired **educative authenticity**.

Lincoln and Guba (1986) argue that applicability is a criterion of good quality. They also point out that studies should facilitate and stimulate action, calling this feedback validity. Assessing **catalytic authenticity** in our research example therefore consists of examining if and how the inquiry process stimulates stakeholders' engagement. **Tactical authenticity** focuses on all participants in a study, which in this example means pupils, parents, teachers, special needs educators, principal and school administration, as also the research teams themselves. In addition to participants, other stakeholders should also be mentioned, such as local and national politicians and officials as well as higher education institutions and researchers within the fields of education and special needs education. The criteria of tactical authenticity include if the findings are empowering or impoverishing for the different participants and interest groups involved in the research project (Johnsen et al, 2020).

Does the research project *International Comparative Classroom Studies towards Inclusion* (Johnsen et al, 2020) generate evidence-based knowledge about practices in classroom settings? Several tools or techniques are used to examine the quality and "truth value" of this qualitative research project – in other words, its strengths and limitations in generating evidence. They indicate that of the many positive quality checks, the most prominent strength is the combination of close collaboration in prolonged engagement together with systematic, repeated internal auditing, multivocality and reflections. When taken together, they strongly indicate that the research contains truthfulness and authenticity. The weakest link is the limited and unsystematic external audits, as they represent a limitation of the quality check.

## An international comparative qualitative research project

Do arguments for qualitative evidence generation also apply to comparative studies? Kvernbekk's argument that if only research findings obtained by quan-

tifiable randomised controlled trials are accepted, this would seriously restrict the content and function of the concept of evidence, is supported by Robin Alexander, main editor of the extensive *Cambridge Primary Review Research Surveys* (2010). He is also author of *Culture and Pedagogy* (2000), an extensive research report on international comparisons of primary education in five countries on three continents. Alexander asks: “In comparing ourselves with others have we got the balance of evidence right? Are we taking too much notice of some kinds of evidence and too little of others?” (Alexander, 2012: 3). He warns: “The way the discourse of international comparison is dominated by international achievement surveys and the accompanying media and political hysteria requires us to think more deeply about evidence” (Alexander, 2012: 4). Referring to an official and highly regarded report, he argues the following (Alexander, 2012: 4):

What the ... report is saying, if we can express the matter even more bluntly, is that in pursuit of what they call ‘evidence-based policy’, governments choose to ignore the larger part of the international evidence that is available to them, including evidence that could give them the insights, explanations and policy options they need.

What is the essence of Alexander’s critique? His main concern is that school advocates, media and politicians choose to seek knowledge from an aspect of the complexity of pedagogical practice that is too limited. He criticises 1) the narrow empirical arena when it concentrates solely on students’ learning outcomes; 2) the preferred focus on quantitative studies; and 3) the consequence of accepting the narrow application of the concept of evidence, which results in there only being a limited part of school-related research that is accepted by media as well as politicians. As a result, Alexander argues in favour of a broad application of the evidence concept. Focusing on comparative studies in particular, he points out that a broad evidence concept includes the majority of studies in the published corpus of academic international and comparative education. These range from descriptive accounts of individual education systems to in-depth studies of school and classroom life related to their historical and sociocultural contexts (Alexander, 2012). Applied to studies of teaching-learning processes in general, it seems that a broad application of the evidence concept invites politicians as well as public officials and media to be aware of a much larger and more nuanced corpus of research – while the evidence concept continues to enjoy its privileged position as a quality mark.

## Conclusion

Is it possible for a qualitative study to generate evidence-based knowledge about inclusive practices in classroom settings? And if so, how is it possible? These questions, which were posed at the beginning of this article, are currently important due to the previously mentioned rising popularity of the concept of evidence-based knowledge within both public debate and scientific communities. The questions are of specific relevance for the joint research project *International Comparative Classroom Studies towards Inclusion* (Johnsen, 2013; Johnsen et al, 2020). Investigation of what is meant by evidence-based knowledge shows two main trends – narrow and broad – either reflecting whether advocates of the importance of evidence-based knowledge are referring to a delimited or the entire research universe. The narrow trend has been recommended by representatives situated in the same methodological discourse and is widely accepted by nonprofessional society. What actually characterises these two trends?

The narrow trend is based on the view that only research findings obtained by quantifiable randomised controlled trials are acceptable as evidence-based knowledge that is suitable for application in educational practice. This view has many advocates within the research community, from the architect of the so-called “what-works” statement David Hargreaves and his likeminded colleagues, such as Kerlinger, Lewellen and Allen, to the U. S. Department of Education’s adoption of this kind of criteria for WWC – or what works in education (U.S. Department of Education, 2003).

The broad application of the evidence concept emphasises the following:

- a) That there is no one methodology that can claim ownership of “the truth”; knowledge about a phenomenon depends upon the construction and epistemological basic of the research issue as well as other methodological aspects
- b) That to recognise the majority of research presentations in the published corpus of educational studies contributes to broad, in-depth and nuanced knowledge about educational practices
- c) That it is of specific importance in educational inclusion to understand the pupil as a unique being rather than a specimen of a class since this is fundamental to understanding the complex teaching-learning processes within the diversity of a school class (Alexander, 2012; Buber, 1947; Creswell & Poth, 2018; Denzin, 2009; Johnsen, 2014b; Johnsen et al, 2020; Johnson & Rasuloova, 2017; Rich, 1975).

When exploring the literature, it may seem that the narrow application of the concept of evidence-based knowledge has a stronger position than the broad application. The U.S. Department of Education's placement within this narrow trend may contribute to its privileged position when it comes to research funding as well as the application of research findings. It is, however, interesting to observe how the classical introductory handbook, *Educational Research* (Gall, Gall & Borg, 2007) has revised and extended its discussion of what the authors call "the nature of educational research". It must be mentioned that they do not argue against the U.S. Department of Education's narrow understanding of research evidence. Nonetheless, through the steady publication of new editions of this internationally read methodology book, they have given increasing emphasis to qualitative methodologies by introducing new ones in new editions. Together with the increasing variety of methodologies, designs and methods, a theory of science discussion is currently growing, which is related to how research focus and methodology are chosen. Last but not least, a series of important research quality criteria reaching far beyond the abovementioned narrow evidence criteria is in development, whereof the urge to minimize research errors and biases is of basic importance for all kinds of research.

Where is the research project *International Comparative Classroom Studies towards Inclusion* (Johnsen et al, 2020) situated in the dispute between these narrow and broad understandings of evidence? Consisting of seven independent research projects within a joint – yet flexible – frame, located in different cultures, applying qualitative methodologies, and mixed methods, the research project is situated within the broad application of the evidence-based research term. The research project is also, as its title implies, an international comparative classroom study having the intention of critically exploring and finding evidence of inclusive practices as well as its dilemmas and challenges. Several scholars within international comparative educational studies support a broad understanding of this field (Johnsen, 2020). Robin Alexander's major international comparative work, *Culture and Pedagogy* (2000), is an example of the search for evidence across cultures and research methodologies. Both his work and arguments (Alexander, 2000; 2010; 2012) have been of relevance and importance for planning and implementing *Inclusive Practices*.

Finally, "does the research project work"? Has it contributed to knowledge about and critical reflections on inclusive practices? The answer to this question may be found in the report that both presents and discusses the overall findings in this exploratory research project. It may also be found in the discussions of

dilemmas and challenges in the process of developing educational inclusion, as well as in a more detailed examination of the methodological criteria used in evidence-based qualitative research (Johnsen et. al., 2020).

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# Comparing Classroom Activities

## *International Comparison of Qualitative Pedagogical Studies*

Berit H. Johnsen

### Introduction

During the last decades, qualitative international comparative studies, including case studies and classroom studies, have gained increasing attention (Alexander, 1999; 2009; Broadfoot, 1999; Phillips, 1999; 2009; Ragin, 1987). Robin Alexander's (2000) major comparative work *Culture & Pedagogy – International Comparison in Primary Education* (hereafter shortened to *Culture and Pedagogy*) and subsequent articles are major works within this research methodology. They are also important sources of inspiration and knowledge acquisition in this article; hence, Alexander's stances and arguments are highlighted along with those of other scholars. However, the main example related to this research project is *International Comparative Classroom Studies towards Inclusion* (Johnsen et al, 2020; WB 04/06, 2006) with participating teams from the Universities of Belgrade, Ljubljana, Sarajevo, Skopje, Tuzla, Zagreb and Oslo<sup>28</sup>.

The intention of this article is to discuss possibilities and problems related to international comparative qualitative studies as they appear in the field's expanding literature. The article starts with one of the most typical problems of international comparative research; the problem of naïve borrowing and the question how this can be avoided. A main issue in the current discourse

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28 Hereafter the joint project (Johnsen et al, 2020) is referred to as *Inclusive practices* and Alexander's (2000) is called *Five cultures*.

on qualitative research concerns generation of evidence. This topic is discussed in the article: *Qualitative Research – Does it work? A Discussion of Qualitative Educational Studies and Generation of Evidence* (Johnsen, 2020). The article focuses on Guba and Lincoln’s “map for evaluating the quality of qualitative research” with its two main pillars; trustworthiness and authenticity, each having a number of criteria and evaluation tools developed by them and adapted in a steadily increasing number of articles (Guba, 1981; Johnsen, 2020; Lincoln & Guba, 1986/2007). One related topic gaining increasing attention concerns the relationship between researcher and research. It is called “insider-outsider positioning” and is topic of discussion in this article. The last half of the article is an account of the trustworthiness and authenticity of *Inclusive Practices*.

## Avoiding naïve borrowing in international comparative education

International comparative educational research is based on a belief that lending and borrowing policies, research-based knowledge and practices all contribute to educational development; in other words, countries and cultures learn from each other. However, countries and cultures consist of complex networks of contextual differences and power relations. Hence, a major problem of trustworthiness and authenticity in international comparative research concerns naïve borrowing. For example, when comparing teaching practices, which is an activity on a societal micro level (Alexander, 2009; Bronfenbrenner, 1979; Johnsen et al, 2020), the challenge is to avoid naïve borrowing, which means to borrow examples between cultures without taking into consideration the previously mentioned networks of differences, including policy, economy and other relevant factors. Supporting this warning, Phillips (2009) points out that the transfer of ideas, practices or policies needs to meet the following conditions:

1. ‘Borrowing’ should be seen as a purposive phenomenon, where deliberate attempts are made to learn from the foreign example and to ‘import’ ideas in the shape of policy and practice into the ‘home’ system.
2. A significant feature of the examination of foreign approaches to educational problems, whether or not they are ‘borrowable’, is that they help us to better understand problems ‘at home’.

3. In analysing ways in which borrowing takes place, it is essential to tackle the difficult question of context and its appropriateness in terms of accommodating imported policies and practices (Phillips, 2009: 1073).

In a brief review of the history of comparative education written in the early nineteenth century, Phillips (2009) describes how borrowing policies and practices have been both glorified and scandalised. He points out that contextualisation is a key factor in the process of borrowing. Different constructions have been developed such as differentiating analysis between stages (Phillips & Ochs, 2004) or between levels, including national, local and school levels, as a means to avoid naïve borrowing.

In recent years, rapid technological development has brought countries and continents closer together into what has been called “the global community”. Accordingly, educational comparisons have developed into global or regional evaluation programmes as well as coordination- and cooperation programmes, such as *The Bologna Process of European Higher Education* (<https://eua.eu/issues/10:bologna-process.html>), which is a coordination program, and *Programme for International Student Assessment* (<https://www.pisa.no/>), which is a large-scale international comparative evaluation project testing pupils’ performance in central school subjects. Are these programmes applied in accordance with Phillips’ (2009) three recommendations above? The emerging large-scale evaluation programmes are implemented in accordance with high-level standard quantitative methodology. The results are then judged reliable, valid and statistically generalizable – and they are made available in order to award countries and local cultures their results in the form of “international standards” and “best practices”. There are, however, growing concerns that this kind of cross-national lending and borrowing strategy within international comparative discourse will cause a host of problems, such as:

- a) the tendency to place a one-sided focus on educational politics
  - b) a one-sided belief in comparative research based on natural-scientific methodology and the use of measurable “international standards”
  - c) a weak emphasis on the importance of contextual factors in comparative borrowing
  - d) the use of “international standards” and “best practices” as relevant measures for the process of teaching and learning at school
- a) The problem of one-sided attention on educational policies has a long tradition from an earlier focus on comparing educational macro levels, as discussed

by Phillips (2009). This problem is strengthened and made more sophisticated through the cross-national lending and borrowing strategy referred to above. However, Broadfoot (2009) also has an optimistic belief in turning away from this one-sided focus, pointing to the eighty articles of the *International Handbook of Comparative Education*:

... in place of the previously more typical focus on education systems and policies, national contexts and international surveys, we are increasingly seeing bold attempts to reconfigure the epistemology of the field: to apply hitherto untapped theoretical perspectives; to conceive new units of analysis and to widen the range of building blocks that form its focus, such as micro comparative studies of classroom life (Broadfoot, 2009: 1249).

Unfortunately, more recent critics have argued that as yet, the turn away from one-sided comparative macro-analyses does not seem to have reached relevant aspects of “classroom life”, as Broadfoot (2009) hoped.

b) Steiner-Khamsi (2014) and Sutoris (2018) characterize measurable “international standards for best practices” found in large quantitative international comparative studies as “thin descriptions”, to use Geertz’ (1937) qualitative and ethnographic characteristic. They argue that classroom implementation is a complex phenomenon that cannot be fully grasped by using surveys alone. On the contrary, in-depth interviews and classroom observations are the methods to be used here. This view is shared in Attia and Edge (2017), Dhillon and Thomas (2019); Hellowell (2006); Johnsen et al (2020); McNess and Crossley (2015); Milligan (2016) and Shah and Quinn (2016).

c) In accordance with the above arguments, “best practices” of large-scale global and regional programmes place a weak emphasis on contextual factors. Offering “best practices” directly indicates to lend naïve or ‘thin’ descriptions of practices. The other aspect of application -- borrowing results from these comparative studies -- needs to be translated from the large-scale study and adapted in accordance with the complex context of a receiving local culture. This action then calls for qualitative studies in order to explore the introduced practices’ suitability to the local culture (Alexander, 2012; 2015; 2016; Steiner-Khamsi, 2014; Sutoris, 2018).

d) Does the conceptual landscape developed in the systems of “international standards” and “best practices” meet the everyday practice of the teaching-learning process? Alexander (2015) argues that they do not.

## Alexanders' international comparative pedagogy and *Inclusive practices*

Robin Alexander (2004; 2009) elaborates on an approach which he calls “international comparative pedagogy” (note: not “education”), pointing out his interest in studies of the many aspects of teaching-learning processes. Studies of activities taking place on the micro-level – within the school and classroom – are his starting point and prioritized research arena. However, in order to situate findings on a micro-level within different cultures and avoid naïve borrowing, Alexander (2009) develops a three-part framework dealing with a) the abovementioned micro-level teaching-learning activities; b) pedagogical ideas, values and beliefs; and c) curriculum from macro to micro-level with general intermediate levels. He argues that each of the three levels may need different methodological tools. In his major work, *Five Cultures* (2000), Alexander compares pedagogy in five countries on three continents, starting with an account of the context, the macro-level, in the studies. Thus, descriptions of educational systems, policy and history are structured in separate chapters for each of the participating countries; France, Russia, India, United States of America and England. In a large section of the study – describing and discussing classroom activities – Alexander applies another structure. Here, findings from all five countries are discussed in a cross-cultural comparison (Alexander, 2000: 265). These discussions are structured in accordance with a model or set of predetermined main aspects based on Alexander’s desire to develop not only a holistic but also a multifaceted construction of teaching-learning processes found in the five countries’ schools. Alexander’s (2000: 325; 2004; 2009) general or *generic model of teaching* consists of the following categories or aspects:

**Frame:** Space – pupil organization – time – curriculum – routine, rule and ritual

**Form:** Lesson

**Act:** Task – activity – interaction – judgement

Each aspect is selected through a line of reasoning. Alexander (2009) is open towards how to apply the aspects to research. He states that it is a matter of choice a) what research questions to formulate or what to explore; b) how to analyze each of them; c) what if any kind of sub-aspects to construct; d) what research methodologies are relevant; and e) what kind of research tools are useful in order to answer the selected questions. Thus, Alexander’s framework for comparative pedagogy is a thorough and flexible framework, or construc-

tion, that may be applied to a variety of relevant research issues. *Five Cultures* (2000) is an example of how a pre-determined framework contributes to structure and clarify cross-cultural analysis and discussions such as the studies conducted by Alexander and his research team in the five different countries. The large sections of *Five Cultures* (2000) that describe and discuss empirical findings are supplemented by chapters where Alexander argues, accounts for and documents the underlying theoretical foundation “in conversation with” other scholars – those with whom he disagrees as well as those who support his arguments. Together with the concluding reflections, these chapters connect the cross-cultural discussions of findings related to teaching-learning processes on micro-level with macro-level; or pedagogy with culture in a broad sense. Thus, *Five Cultures* (2000) does not contain one separate chapter that focuses on connecting findings in the framework’s three parts – frame, form and act – described by Alexander (2009), but several discussions that take place across these parts throughout the book. He concludes with the following statement concerning the three parts’ comparison:

The book has engaged with primary education at the level of system, school and classroom, so it may also speak to the condition of those who work at these levels: policy-makers and administrators, school heads, principals and directors, parents, teachers. However, the levels are not discrete – pedagogy manifests the values and demands of nation, community and school as well as classroom – and no level in this model can be understood fully without reference to the others, so to extract this or that policy or practice without regard to how it fits into the total picture would be ill advised (Alexander, 2000: 563-564).

In this way, Alexander (2000) sums up how he avoids naïve borrowing. In which way is Alexander’s line of arguments relevant for *Inclusive Practices*? This important question is addressed below through the clarification of two other crucial concepts.

Referring to both his earlier international comparative research project, *Five Cultures* (2000), and later works, Alexander asks: “Why no pedagogy ...” (Alexander, 2015:254)? His answer contains a reflected proposal to a conceptual framework for the teaching-learning process that may indicate empirical possibilities for international comparative classroom studies. They consist of two main pillars:

*Teaching as an act:* Planned acts – interactive actions – judgements concerning organisational, curricular, epistemic and temporal elements

*Teaching as ideas:* Values, beliefs, theories, evidence, policies and justifications on classroom – system/political – cultural/societal levels

Alexander states that teaching as an act identifies the cross-cultural invariants of teaching, while teaching as ideas addresses the cultural aspects of meaning. In this way, his conceptual framework contributes to adapting a borrowed phenomenon to a local community and school by placing it in the local conceptual landscape – as a local “thick description”. Alexander’s (2015) proposal about the development of a practice-near and educational-professional terminology moves in the same direction as in his previous works (2000; 2004; 2009). *Inclusive Practices* (Johnsen et al, 2020) follows a similar logical path. The issue or main question of the joint international comparative classroom research is:

How does school teach in accordance with pupils’ different levels of mastery and needs for support in the learning process (recourses, barriers and dilemmas)?

The research is based on a pre-determined pedagogical construction consisting of seven interrelated didactic-curricular main aspects, or themes, as a joint frame for the qualitative research processes and product; through field studies, compilation and conclusive discussions. The main aspects are knowledge of the pupil/s – assessment – educational intentions – educational content – methods and organisation – communication – care (See Alexander, 2000, and above in this section; Braun & Clark, 2006; Johnsen et al, 2020). This is a practice-near study of inner activities at school focusing on the abovementioned seven joint aspects on micro-level and “embraced” by discussions of contextual similarities and differences on macro-level. Thus, similar to Alexander’s construction, *Inclusive Practices* a) applies a set of pedagogical concepts that are generally understood and accepted within international educational research; and b) accounts for a number of relevant contextual differences and similarities. Hence, findings presented and discussed in the rapport are situated within common pedagogical conceptual frames and contextual diversity, as pedagogical and “local-international” thick descriptions.

As this section indicates, naïve borrowing is a recurring problem within international comparative studies. The problem concerns research credibility regardless of whether it applies to quantitative or qualitative studies, and there is good reason to strive to avoid it. Constructing research process, compilation and reporting on *Inclusive Practices* have therefore focused on avoiding naïve borrowing. Hence, placing findings in the pedagogical and cultural context as thick descriptions is one of a number of research methodological details. However, this is an important detail concerning trustworthiness and authenticity of a qualitative international comparative research project such as this (Alexander, 2015; Johnsen, 2020; Johnsen et al, 2020).

## Insider-outsider aspects of international comparative qualitative studies

Another important topic of continuous discussion is the researcher's relationship with the research. Is the researcher an insider or an outsider? Which is the preferred role? The so-called "inside-outside question" is a central issue connected to participatory roles, power relations and hence validity within qualitative research in general, and qualitative international comparative research in particular, as is the case in *Inclusive Practices*. Accordingly, *Inclusive Practices* is also used as an example in the subsequent summative discussion of current arguments concerning the insider-outsider issue.

Historically, the outside researcher has been considered as preferably objective and neutral. However, Merton's (1972: 21) knowledge-sociological arguments for a structural conception of insiders as members of not only one, but several groups and collectives as well as occupants of specified social statuses, extends the use of the concepts from static dichotomy to dynamic and multifaceted concepts; hence, it changes the discourse. His arguments are expanded upon in several disciplines; among them educational sciences. There are ongoing efforts to clarify and further develop Merton's conception of the researcher's multifaceted roles. Thus, the static distinguishing of the researcher as either outsider or insider is changing into a perception of a dynamic identity shift in accordance with situation, role and responsibility. This new perception describes the positioning as an insider or outsider or somewhere in-between. Several terms are used in order to characterise this "newly discovered" dynamic positioning, such as the abovementioned "in-between position", "the third space, the researcher as "the stranger", "the other" or "the home comer" (Dhillon & Thomas, 2019; Hellawell, 2006; McNess et al, 2015; Milligan, 2016). The many characteristics of the researcher's position to the research cover what might be called a continuum between the insider and the outsider at the outer edges. Both these roles are recognised and attached to different characteristics. Hellawell (2006: 487) argues that:

"... ideally the researcher should be both inside *and* outside the perceptions of the 'researched'. That is to say, that [...] both empathy *and* alienation are useful qualities for a researcher.

Hellawell's two aspects may also be described as closeness and distance. A joint trend in current developments is the attention to the dynamic character of the insider-outsider as being layers of complexity and fluidity in

different roles; “the inside, outside, upside, down”, as Thomson and Gunter (2011) metaphorically describe them. Another way of putting it is as discretely varying shades of “insiderism” and “outsiderism”, while the terms “in-between” and “the third space” signal a possible third dimension (Dhillon & Thomas, 2019; Hellowell, 2006; McNess et al, 2015; Milligan, 2016; Thomson & Gunter, 2011).

Co-researching is a recurring issue in the inside-outside debate. This is of special relevance in international comparative qualitative studies since they as a rule consist of more than one researcher. Studies referred to here, discuss inside-outside aspects in co-researching between researchers and assistants or students as well as between local and foreign researchers (Dhillon & Thomas, 2019; Hellowell, 2006; McNess et al, 2015; Milligan, 2016). In *Culture and Pedagogy* (2000) Alexander leads a team of research colleagues from the UK in comparative classroom studies on several continents. In *Inclusive Practices* (Johnsen et al, 2020) Johnsen coordinates research teams from seven European universities. Dhillon and Thomas (2019) point out that different researchers may have abilities “to see phenomena through different cultural lenses” and thus add valuable information to a study. They highlight co-researching as a methodology that includes co-interpretation and co-analysing. This is in accordance with *Inclusive Practices* where the cooperation between the research teams also implies co-construction, co-compilation and co-disseminating in a dynamic sharing of responsibility (Johnsen et al, 2020). In *Inclusive Practices* as in other studies, local researchers have cultural as well as local language skills and responsibilities as insiders (Attia & Edge, 2017; Caretta, 2014; Dhillon & Thomas, 2019; Hellowell, 2006; Johnsen et al, 2020; McNess et al, 2015; Milligan, 2016; Thomson & Gunter, 2011, Vulliamy & Webb, 2009). Other researchers may have different types of insider as well as outsider knowledge, experience and responsibility such as those found within pedagogy, curriculum and didactics or methodology (Alexander, 2010; McNess et al, 2015). Central features of qualitative research are the unique ideographic elements of phenomena which, when seen from different insider perspectives or perceived in different contexts, illuminate otherwise hidden aspects of its complexity. This is crucial in international comparative qualitative research in order to reveal contextual differences and thus prevent naïve lending and borrowing of research findings. Consequently, it is important that not only researchers but also all participants in a study have a voice in the inquiry as well as in review of **trustworthiness and authenticity** (Johnsen, 2020; Lin-

coln& Guba, 1986/2007). Within educational sciences, there are several groups of informants in addition to the researchers, including professional teachers and special needs educators, parents and pupils as well as other stakeholders such as local and national officials and politicians. *Inclusive Practices* has relevant informants from all these groups.

As indicated above, an important reason for co-researching is the need for targeted and trustworthy contextual studies. Thus, McNess et al (2015) point out the following:

Within the field of international and comparative education studies, new methodologies have been employed to develop more contextually relevant understandings when working cross-culturally. The active development of collaborative and inter-disciplinary international research teams has sought to harness the strengths of combining multiple linguistic and cultural perspectives, not only in the collection and analysis of data, but also, importantly, in identifying key issues and appropriate research designs. Such collaborations make it possible to investigate phenomena across national and cultural boundaries, addressing issues of conceptual and linguistic significance from both the inside and the outside and, in so doing, seek to enhance contextual relevance  
McNess et al (2015: 298)

The article proceeds with examples of contextually relevant co-researching. *Inclusive Practices* fits perfectly as an example of this relevancy, as it has a) different research teams with first-hand language and cultural knowledge – including research-cultural experience; and b) a permanent project interpreter mediating between the collaborating teams during the entire cooperation period (Johnsen, 2014b; 2014d; Johnsen et al, 2020). Thus, participants' and researchers' first-hand knowledge and experiences within different contexts contribute to envisioning the diversity of emic, subjective perspectives of complex phenomena in their different insider roles, thereby strengthening the truthfulness of the research. The insider perspectives – including thick, contextual descriptions – are related to theoretical and methodological reflections and conceptualisations. In this way, insiders' meanings are balanced with outsiders' research-based interpretations, reflections and formulations (Gall et al, 2007; Geertz, 1997; Williams & Morrow, 2009). In this process, participating researchers may move between different insider and outsider roles, as discussed above. This is the case in *Inclusive Practices*.

As indicated above, the insider-outsider dimensions of international qualitative comparative methodology span an area from the insider's subjective diversity – even the individual “fluent” life-story of diversity – to the dialogism-

based communicative common space. In their attempt to re-examine insider-outsider discourse in view of these aspects, McNess and colleagues (2015) pose the question whether Gadamer's hermeneutics and Bakhtin's dialogism can act as mediating tools between the cultural and linguistic meaning of insiders' and outsiders' contributions to a common interpretation. They ask a) if Gadamer's (1975) hermeneutically conscious pre-judgement and historically embeddedness can enable researchers to disclose questions that have not yet been asked and search for a fusion of horizons between the insiders' meanings and outsiders' conceptualisations; and b) if Bakhtin's (1986) dialogism can support Gadamer's hermeneutic fusion of horizons? McNess and colleagues quote Bakhtin as follows for discussion purposes:

A meaning only reveals its depths once it has encountered and come into contact with another, foreign meaning. ... We raise new questions for a foreign culture, ones that it did not raise itself; we see answers to our questions in it; and the foreign culture responds to us by revealing to us its new aspects and new semantic depths ... such a dialogic encounter of two cultures does not result in merging or mixing. Each retains its own unity and open totality, but they are mutually enriched (Bakhtin, 1986: 7 in McNess et al, 2015: 306).

Neither the short references to Gadamer and Bakhtin in McNess' and colleagues' texts nor this text "guarantee a complete fusion of horizons" between insiders and outsiders. However, an in-depth understanding of their texts reveals methodologies that may function as mediating tools of historically embedded cultural and linguistic meaning. Rommetveit, who is also a pioneer in dialogism, points to the two Continental European epistemologists and moral philosophers, Gadamer and Buber, arguing the following:

In their reflections upon the ideal dialogue, they are both strongly concerned with the aspect of linguistically mediated meaning related to epistemic co-responsibility and co-authorship. Buber calls the attitude one has to one's conversation partner in the ideal dialogue an "I-You" attitude, and the significant distinction between an "I-You" conversation and an "I-It" communication appears to be this: During an "I-You" conversation, you meet your conversation partner as a fellow human being, a subject, a potential co-author of your own biography (Rommetveit, 2014: 56).

The communicative act is further illustrated by Buber's (1947) discussion of the notion of 'inclusion', which he relates to the concepts of 'dialogue' and 'dialogical relation', stating that 'inclusion' is:

... the extension of one's own concreteness, the fulfilment of the actual situation of life, the complete presence of the reality in which one participates. Its elements are, first, a relation, of no matter what kind, between two persons, second, an event experienced by them in common, in which at least one of them actively participates, and, third, the fact that this one person, without forfeiting anything of the felt reality of his activity, at the same time lives through the common event from the standpoint of the other.

A relation between persons that is characterised in more or less degree by the element of inclusion may be termed a dialogical relation (Buber, 1947: 124-125).

Thus, Gadamer, Bakhtin, Rommetveit and Buber – pioneers in hermeneutics, dialogism and humanistic philosophy – argue that the dialogue between all participants is not only a methodological tool but also an ethical principle in qualitative research.

This insider-outsider discussion highlights researchers' many-sided relations to research colleagues and participants as well as the research itself. This point is especially relevant in international comparative qualitative studies where several cultures, and even nations, participate. The discussion emphasizes a) the range between insiders' subjective diversity and the search for a fusion of interpretations into a dialogue-based communicative common space; b) development of researchers' awareness, reflexivity and dialogue throughout the research process, from preparation to dissemination, or "how to be(come) a reflexive researcher" (Attia & Edge, 2017; McNess et al, 2015; Rommetveit, 2014 ); and c) a subsequent contribution to the trustworthiness of research (Johnsen, 2020; Lincoln & Guba, 1986/2007). *Inclusive Practices* is mentioned as an example related to several dimensions in the discussion of insider-outsider aspects. In the following, a more coherent summary of the research is presented with a focus on trustworthiness and authenticity.

## Trustworthiness and authenticity in *Inclusive practices*

In the following sections, the trustworthiness of *Inclusive practices* is summarily discussed. In everyday language, *trustworthiness* simply means to deserve trust (<http://www.merriam-webster.com/dictionary/trustworthy>). In research terminology, trustworthiness means rigor, unbiasedness, quality, even "goodness". The concept is applied since the dawn of current qualitative research tradition and relates to validity or confidence in information accuracy

(Creswell, 2007; Creswell & Poth, 2018; Johnson, 1997; Loh, 2013; Morrow, 2005; Shenton, 2004; Stake, 1995; 2006). Several of these texts refer to the classical article of Egon G. Guba (1981), where he discusses how to judge or evaluate "... the trustworthiness of inquiries conducted within the naturalistic inquiry paradigm. (...) also referred to as the phenomenological, anthropological, or ethnographic ..." methodology (Guba, 1981:75). Adding case studies to the mentioned qualitative designs, he has mentioned several of the qualitative main approaches. Guba's important contribution to the field consists of his systematic breakdown into four aspects of trustworthiness; a) credibility, b) transferability, c) dependability and d) confirmability, and his detailed description of each aspect. Several scholars refer to and further develop these aspects and apply them in their research.

Together with Lincoln, Guba adds a complementary aspect concerning the quality of qualitative research, namely *authenticity* (Lincoln & Guba, 1986/2007; Morrow, 2005; Schwandt, 2007). In everyday language, authenticity means genuineness. Authenticity draws attention to cultural and individual diversity, to the uniqueness that may be revealed through insider knowledge and experience. Learning about informants' and other participants' experiences makes researchers able to approach a common interpretation -- or at least a joint understanding -- of each other's interpretation, taking into account both insider and outsider perspectives or the emic-etic relations between participants, informants and researchers. In the case of *Inclusive practices*, approaching authenticity concerns relations between the seven research teams from different university cultures in six countries and their participants, informants and other stakeholders. Authenticity is approached through fairness, ontological-, educative-, catalytic and tactical authenticity (Lincoln & Guba, 1986/ 2007; Johnsen, 2020; Morrow, 2005; Schwandt, 2007).

Qualitative studies have been developed alongside philosophical, historical and other textual analyses characterized as ideographic studies; studies that seek holistic and nuanced understanding of phenomena within fields such as education, as argued by Rich (1975; Johnsen, 2020). During the rapid influx of qualitative studies within an increasing number of sciences, there is a growing urge to develop methodological criteria suitable for assessing their rigor. Lincoln and Guba are amongst the pioneers in this development, followed by a steady stream of scientists. Thus, the search for relevant assessment processes for the two main aspects is still ongoing (Schwandt, 2007; Shannon & Hambacher, 2014). Evaluating the quality of *Inclusive practices* as an inter-

national comparative qualitative research is based on these assessment tools and processes.

As mentioned, Alexander's *Five cultures* (2000) has been an important "a role model" for *Inclusive practices* from the very beginning. However, there are, naturally, several differences between the two studies. Thus, *Inclusive practices* differs from Alexander and his British team's research in that the team implements the studies in all countries, while in *Inclusive practices* the studies are implemented by seven different teams, each from their local university, as mentioned above. Some of these teams are from newly established faculties or departments, others from well-established research societies, such as the Universities of Belgrade and Zagreb, which have served as important catalysts for establishing the more recent ones. Furthermore, the seventh participant is the University of Oslo on the "northwestern outskirts" of Europe. Hence, although the university cultures are different, every research team has inside knowledge and experience of its study's culture and context (Johnsen, 2013a; 2013c; 2013d; 2013e; 2013f; Johnsen, Rapaic et al, 2013; Johnsen, 2014d; Johnsen et al, 2020). Visualizing differences as well as similarities between the seven participating research teams serves to a) embed the findings of the classroom studies in their local contexts; and b) create possibilities for taking cultural differences and similarities into account when interpreting the findings on micro-level and hence avoiding naïve borrowing – or at least contribute to an awareness of contextual limitations with comparison. Contextual aspects are endless, and it is an art in itself to shed light on only those aspects that are considered most relevant for any given study. As presented above, Alexander (2009) focuses on two contextual aspects in addition to his main focus on classroom activities, namely pedagogical ideas, values and beliefs as well as curriculum from macro to micro-level. The focus on contextual aspects surrounding the inner activity of the schools in *Inclusive practices* may also be divided into a) pedagogical theories and research; and b) cultural-historical aspects. They are accounted for in several articles in the three anthologies covering this joint international research project as well as in the main article describing and discussing the research findings (Johnsen, 2013; 2014; 2020; Johnsen, et al, 2020). Two important questions remain: How is trustworthiness taken into account through the research process? Is it fair to characterize *Inclusive practices* as a holistic and trustworthy international comparative research? In the following trustworthiness and authenticity is accounted for in all phases of the research project; planning, implementing, compiling and dissemination of findings.

## The preparation and planning process of *Inclusive practices*<sup>29</sup>

Securing a high degree of trustworthiness and authenticity in a research project starts in the preparatory phase. While developing a research topic, questions and methodology, it is also necessary to ensure its quality or “goodness” (Morrow, 2005) step by step. How is trustworthiness and authenticity embedded in the main issue and construction of *Inclusive practices*? This overarching question generates further questions concerning the project’s main aspects. The planning process is decisive for the trustworthiness of the entire work. The question of planning credibility concerns whether the intended research purpose and construction of the joint research project is perceived as meaningful to all participants connected to the seven universities (Guba, 1981, Johnsen et al, 2020; Moon et.al., 2016; Tracy, 2010). As this research project consists of seven research groups and researchers from different university cultures as well as different nations, how do we raise awareness about cultural differences and approach authenticity among both research teams and informants? Since this is an international comparative study, how are cultural aspects taken into account? And, how are they connected to findings on micro-level? These are questions discussed in the following sections.

**Approaching cultural differences between research teams.** As mentioned, of the seven universities participating in this research, six are located in the Western Balkan region of former Yugoslavia. After World War II Norway and Yugoslavia developed different kinds of welfare societies. However, while Norway has experienced a long period of peace and stability as well as democratic and economic development, the other five countries have recently endured radical societal systemic changes and fragmentizing wars that have put development several years behind, leaving them at the start of rebuilding their social structures and economies. However, due to their shared history and similar Slavic languages, the five countries in the Western Balkan region are assumed to have “regionally internal” similarities even though in their current development states may differ, whereas Norwegian language and culture are more

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29 The preparatory period, including joint and individual research plans, are described and discussed in the first of three anthologies related to this research cooperation (Johnsen, 2013), but not related to micro-macro dimensions or research credibility. Likewise, important aspects of the implementation process are described and discussed in the next anthology (Johnsen, 2014), while this third and concluding anthology (Johnsen, 2020) accounts for findings.

distant. How is it possible to raise awareness about cultural nuances and differences and increase joint understanding; in other words, to handle authenticity between research teams and informants? Several actions have been undertaken in the preparatory phase; a) A four-year innovation project was carried out among three of the research teams (SØE 06/02); b) a permanently employed interpreter participated in the abovementioned innovation project and current research projects; c) the research project has a joint theoretical foundation; and d) joint methodological frames; as well as e) joint main frames for classroom studies.

**A: From innovation project to international comparative research cooperation within the same theme.** WB 04/06 *Inclusive practices* is a systematically research-focused continuation and extension of a former project. The first and very important steps towards joint cultural and pedagogical understanding took place through the four-year innovation cooperation project *Special Needs Education towards Inclusion* (SØE 06/02) completed at the universities of Tuzla, Sarajevo and Oslo. The project had a number of activities “towards inclusion” and may – in the aftermath – be seen as a pilot project. (See literature from SØE 06/02: Ćišić et al (Eds.), 2004; Johnsen (Ed.), 2005; related Master theses, articles and chapters (Dzemidzic, 2007; Pavlovic, 2005; Pepeljak, Begić & Buljubašić, 2005; Ruud, 2005; Smajic, 2004; Zekic, 2004). The main activity consisted of an innovation project implemented between a number of regular schools in Bosnia and Herzegovina and the universities of Sarajevo, Tuzla and Oslo. The intention was to try out concrete approaches in upgrading professional teachers towards inclusive practices in regular schools. This was done through lecturing and discussing educational and special needs educational tasks that were implemented between the seminars (Johnsen, 2007). The innovation topic gave participants from the Bosnian and Norwegian universities a joint arena for exchanging information. Additionally, six Bosnian students attended the international Master of Philosophy programme in Special Needs Education at the University of Oslo.

During this first project Bosnian colleagues initiated conference visits for colleagues from the universities of Belgrade, Zagreb and Macedonia. At the end of the project period, participants from seven universities in the Western Balkan region were ready to participate in a new and more research-oriented cooperation with the University of Oslo. While the joint plan for this research project was based on former innovations related to educational inclusion, it placed a sharper focus on the former project’s following aspects:

- To investigate the ongoing upgrading process of inclusive practices in the regular school
- To investigate further two specific qualities of the inclusive school that were introduced through innovation activities under these concepts:
  - ▶ The classroom as a socio-emotional safe haven
  - ▶ The creative school for all
- To investigate how regular and special needs teachers and –educators (defectologists) cooperate in planning, implementing and assessing individual educational plans related to a class or group
- To continue cooperation within research methodology and theory, focusing on qualitative approaches and action research.

**B: Project interpreter.** Project SØE 06/02 had the same interpreter from the project's preparatory phase to its conclusion Mr. Goran Đapić from Sarajevo. He provided consecutive interpretation between Bosnian and English on all meetings and headed synchronous interpretation at conferences. Having an authoritative interpreter accompanying the project and steadily developing more professional and scientific terminology within the education and special needs education research fields greatly benefits the development of a joint understanding among the participating cultures. Mr. Đapić also participated in the current project WB 04/06 from start to finish.

**C: Joint theoretical foundation.** The WB 04/06 project plan draws attention to the interplay between regular and special needs education in developing inclusive practices in the regular school. The plan focuses on the interrelation of two theoretical approaches; 1) cultural-historical approach to the study of teaching, learning and development based on Lev Vygotsky's and the post-Vygotskian school of thought; 2) a didactic-curricular perspective of inclusive practices. The theoretical approaches have been introduced during the SØE 06/02 innovation project, and researchers from the universities of Tuzla, Sarajevo and Oslo have followed up and discussed practices in project schools.

**D: Joint methodological foundation.** Case studies have a strong tradition within classroom research using a qualitative or so-called mixed method approach, and they are applied in this project. Being internationally anchored, qualitative international comparative methodology is one of the project's theoretical pillars, as briefly discussed in the project description (Johnsen, 2013a). Taking into consideration general cultural differences and different research cultures, each university is advised to select relevant research questions, design,

methods, instruments and ways of analysing their studies within the common frames described in the joint plan. Thus, the flexible connections to the common research plan are accepted, and each university team presents their own plan as it relates to the joint research plan (Igrić & Cvitković, 2013; Jachova, 2013; Johnsen, 2013a; 2013b; Kogovšek, Košir & Ozbič, 2013; Rapaić, Nedović, Stojković & Ilić, 2013; Salihović, Dizdarević & Smajić, 2013; Zečić, Čehić, Kristiansen & Hadžić, 2013).

**E: Joint foundation for classroom studies.** What, then, is the common basis for this project? It is best described by presenting the joint research question or issue and a set of didactic-curricular main aspects or arenas for research. The main research question is:

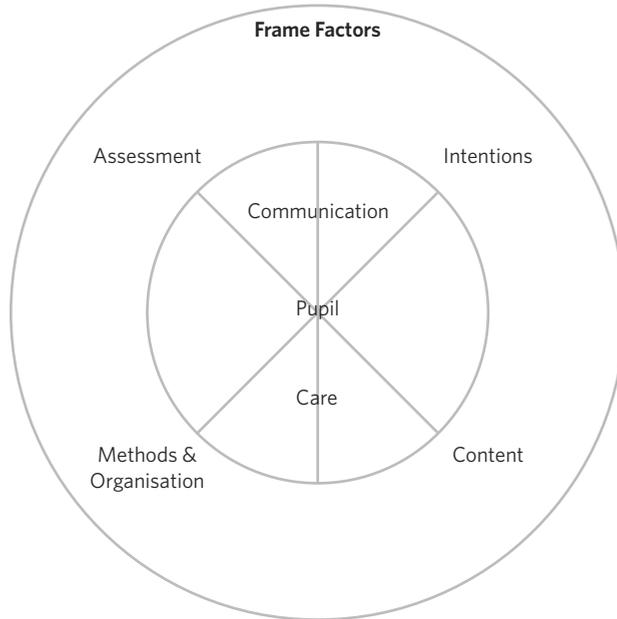
How does school teach in accordance with pupils' different levels of mastery and needs for support in the learning process (recourses, barriers and dilemmas)?

The plural form of “pupils” and “needs” signalises the community of the class and thus the development of the inclusive class. Focus is on the teachers', special needs educators' and other teaching participants' activities in the interaction between school and pupil, also called “the master-apprenticeship relation” (Lave & Wenger, 1991: 94). Eight didactic-curricular main aspects are selected as joint topics for information gathering in order to describe, analyse and discuss the research issue. These are the following:

The pupil/s – Assessment – Educational intentions – Educational content – Class organisation and teaching methods – Communication – Care – Context

Research question and main aspects constructs a joint umbrella or frame for comparative analysis and discussions of the classroom studies with focus on the inner activity of schooling – called the internal micro dimension by Alexander (2000). Within this frame there is flexibility concerning the research teams' choice of research focus on studying teacher activities related to a) number of pupils in focus; b) type of special need/disability/vulnerability and c) which of the eight topics to study in depth (in the foreground of attention), and which ones as background aspects (Johnsen, 2013a). The rationale behind the eight didactic-curricular aspects is discussed in Johnsen (2014a) and in more detail in Johnsen (2007), and summed up here in the following figure.

Thus, the eight didactic-curricular main aspects constitute the pre-determined categories that provide structure for the research focus as well as the analysis, findings and discussions of the seven classroom studies on the internal



**Figure 1.** *The Curriculum Relation Model revised 2006 (Johnsen, 2007).*

micro dimension. They are not the same as in Alexander's (2000; 2004; 2009) generic model of teaching since the research issue is not the same. However, the logic of applying predetermined focal points to the joint studies is similar to Alexander's logic. This constitutes the common pedagogical research focus and is key to establishing a coherent common area of study – and thus also contributes to strengthening the credibility of the international comparative classroom study.

## **The implementation process of *Inclusive practices***

Activities introduced in the project-planning phase in order to secure flexible insider-outsider dimensions, trustworthiness and authenticity and avoid naïve borrowing are followed up in more detail in the implementation phase. As pointed out, classroom activities are the focus of the implementation of the seven studies. Although they are carried out with considerable nuances in content and methods, this is done under the joint didactic-curricular umbrella referred to above, having been described and discussed in detail in the two former anthologies (Johnsen, 2013; 2014). Following up the discussion on trustwor-

thiness, the question remains: How is it possible and methodologically sound to compare different sites, such as classrooms, within different socio-cultural contexts? As shown, Alexander answers the question by presenting a framework consisting of parts or levels. The first level, which is in the foreground of Alexander's work as well as this project, focuses on the classroom. The second level refers to pedagogical ideas informing activities on micro-level, such as ethical, theoretical and relevant former studies. The third level focuses on curriculum theories from macro to micro-level (Alexander, 2009).

**Theoretical discussions.** In *Inclusive practices* a series of articles elaborate on different aspects of the main theories applied in the study; a) Vygotsky's culture-historic school on teaching-learning-development; and b) didactic-curricular aspects of teaching-learning processes, or pedagogy, as Alexander calls it. Several of these articles have been published in the second anthology of this work: *Theory and Methodology in International Comparative Classroom Studies* (Johnsen, 2014). They are written by internationally renowned scholars from England, Scotland, Serbia, France and Norway, of whom some have been invited to workshops on behalf of the WB 04/06 project. Thus, Ivan Ivić from Serbia is invited along with James Wertsch from the USA to the project workshop at the University of Oslo. Ivić (2014) writes an article on Vygotsky and Piaget. Harry Daniels from England lectures at the University of St. Cyril and Methodius University of Skopje. He contributes two articles, whereof one discusses Vygotsky's theories related to disability and the other to pedagogy (Daniels, 2014a; 2014b). Another article reviews texts concerning Vygotsky's legacy regarding teaching-learning interaction and development (Johnsen, 2014b). The article also discusses interpretation challenges for those who are not able to read Vygotsky's texts in the original Russian. The translation- and interpretation problem, which challenges authenticity and trustworthiness, is also discussed by Alexander (2009). Colwyn Trevarthen (2014) from the University of Edinburgh contributes with an article on the origin of communication with reference to the culture-historic school. The didactic-curricular main aspects framing the joint classroom studies are discussed in a lengthy article (Johnsen, 2014a). Ethical discussions related to research standards are initiated already in the joint research-planning phase and followed up by the research teams. However, political matters are discussed more than ethical ones throughout the project; these are mostly related to international and national policies of inclusion and their impact on practice, as may be observed in articles by all research teams in the anthologies (Johnsen, 2013; 2014 & 2020). Looking back, ethical discus-

sions have not been systematically placed on the main agenda in any of the joint research seminars, even though gaps between policies and practice have been eagerly discussed and also documented to some extent. The lack of systematic joint focus on key ethical matters should not be repeated in future research cooperation within this area. Around the same time as the research project's implementation, an emerging ethical-political program is developed through criticism and optimism by the Bulgarian-French philosopher Julia Kristeva. Her program concerns the relationship between all citizens, or between individuals with and without disabilities. In her letter to President Chirac on the conditions for individuals with disabilities (2008), she asks, "Why they are not seen" and "Why it is so difficult to create an inclusive society". As answers to her questions, Kristeva has developed a psychoanalytical construction using the concept of 'the other' or 'the stranger in us' at its center. She argues that confronting this 'stranger' – for example a person with a disability – provokes anxiety in an unfamiliar able-bodied individual. The consequence is invisibility and marginalization. In her critique of conditions in France, Kristeva points to countries such as Canada and Sweden where conditions for disabled individuals have greatly improved. She also urges French society to remember that the cradle of special needs education was in Paris. Inspired by the slogan of the French Revolution, Kristeva calls for a new and expanded form of enlightenment with the notions of liberty, equality and community, adding a fourth key concept, namely vulnerability. Julia Kristeva's ethical-political approach is applied as inspiration (Gardou, 2014), as topic of critical analysis (Koren & Engebretsen, 2014) and as criterion for a critical analysis of the gap between political intentions and practice in Norway (Johnsen, 2014c).

**Historical diversity.** Historical dimension is a main theme in comparative educational research. In Alexander's comparative pedagogy, it also plays a role as an important cultural aspect (Alexander, 2000; 2009). Historical aspects relevant to comparative studies visualize contextual conditions and thus contribute to mentioned thick descriptions of the phenomenon in focus. They invite insider information; hence, they contribute to minimize or avoid naïve borrowing, instead strengthening transferability and dependability, which are important aspects of the trustworthiness found in this mainly qualitative international comparative research cooperation. The historical dimension is not at the forefront of this project since the main issue concerns how current schools are managing to teach in accordance with the different individual needs and possibilities existing within the community of the class. However, several historical aspects

contribute to modifying and explaining the empirical findings on micro-level. As argued above, on micro-level there are considerable differences in Norwegian and Western Balkan history with cultural consequences, including economic and social ones. Three historical aspects shed light on the classroom studies; 1) the general history of the two European regions as well as current history in the Western Balkan countries; 2) ordinary and special needs education history; and 3) the history of education and special needs education research and higher education in the participating countries. Historical milestones in the establishment of universities, education and special needs education- or defectological -sciences and doctoral degrees at the cooperating universities are presented in Johnsen, Rapaić et al (2013). In the article, higher education and research from Yugoslavian times to the Bologna process are in focus. The development of education, special needs education and research as well as research mentality in Norway is discussed in textual-analytical and interview-based articles (Johnsen, 2013d; 2013e). Thus, a variety of historical and current inside aspects in the participating countries are presented.

**Methodological issues** are presented and discussed in a number of articles. Foremost among these are the two articles written by educational philosopher Tone Kvernbekk (2013a; 2013b). The latter one, *Evidence-Based Practice and Educational Research*, is followed by *Qualitative Comparative Research – Does it work? A Discussion of Qualitative Pedagogical Studies, Generation of Evidence and International Comparison* (Johnsen, 2020) and this article. Since action research is a new and interesting methodology used by some of the research teams, two methodological articles discuss its use in different settings; Postholm (2014), and Engebretsen, Andersen, Urstad & Wahl (2014). There is a focus on methodological issues in two of the ambulating project workshops, by Professor Tone Kvernbekk, University of Oslo, in the Sarajevo workshop and Professor Harry Daniels, University of Bath, UK, in the Skopje workshop. In addition to the previously mentioned articles, each of the seven research groups account for choosing and applying their methods and instruments (Igrić, Cvitković & Lisak, 2014; Jachova, Angeloska-Galevska & Karovska, 2014; Johnsen, 2014d; Johnsen, 2014f; Kogovšek, Košir & Ozbič, 2014; Rapaić, Nedović, Stojković & Ilić, 2014; Salihović & Dizdarević, 2014; Zečić, Kristiansen, Hadžić & Čehić, 2014). The articles document the nuances in choosing methodology and connecting to each study's concrete research issue. They a) report traditional research ethical considerations, b) show background data, c) use in-depth studies resulting in thick descriptions, d) make use of several other validation techniques, such

as member checking, and e) apply triangulation through using two or more methods. In this way, the articles show several efforts to increase and strengthen trustworthiness through confirmability, dependability, transferability and credibility. First and last, they are examples of insider-outsider discussions belonging to the joint research *Inclusive practices*.

## Dissemination

The planning, implementing and writing period of *Inclusive Practices* – which has taken several years and is covered in three anthologies, including this work, have been and are distinguished by hermeneutic back-and-forth movements (some would call these circle movements) between different aspects of the three levels of a framework having certain similarities to Alexander's levels (2004; 2009); a) the main level, which is the classroom and the inner activity of schooling, b) the broad pedagogical context, and c) the culture-historical context.

The main part of this third anthology presents the dissemination of the joint findings of inclusive practices taking place on micro level in classrooms. Here the seven research teams address the common issue, each applying their own individual research focus in accordance with joint research structure and research issue:

How does school teach in accordance with the pupils' different levels of mastery and needs for support in the learning process (recourses, barriers and dilemmas)?

The joint research report consists of the fifteen chapters: Introduction -The pupil in the community of the class – Assessment – Educational intentions – Educational content – Educational methods and organisation – Communication – Care – Context – Summary of jointly reported findings and discussions – Further reflections – International Comparative Classroom Studies of Inclusive Practices in light of pedagogical traditions and ideas – Methodological considerations – Conclusion – References.

The fusion of the seven studies has taken place in a process consisting of collection, analysis, review and compilation. It has been comprised of eight steps a) the first compilation where each research team describes their findings within the seven main aspects concerning internal classroom activities of the curricular-relation approach; b) a series of internal reviews in written form in addition to joint seminar discussions ; and c) the transfer of the insider information towards a steadily more accepted fusion into a joint report has gone

through a series of either member checks or internal auditing and reflections; d) in addition to the findings of individually adapted and inclusive classroom practices on a micro level, a number of contextual aspects are discussed, which helps avoid naïve borrowing; e) relevant studies, theoretical clarifications and methodological aspects – specifically concerning checking truthfulness and authenticity – contribute to outsider perspectives and research-based formulations; f) as may be observed in the completed report (Johnsen et al, 2020).

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# **PART TWO**

SEVEN UNIVERSITY TEAMS, STUDIES AND  
RESULTS



# Inclusive Education in Serbia

## *Legislation and Practice*

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Irena Stojković and Snežana Ilić

## Introduction

This study is a contribution to the project *Comparative Classroom studies towards Inclusion*, which is a part of the international research cooperation project *Development towards the Inclusive School: Practices – Research – Capacity Building*. Universities of Belgrade, Ljubljana, Sarajevo, Skopje, Tuzla, Zagreb & Oslo (WB 04/06). The objective of the comparative classroom studies is to examine teaching and learning processes in regular classes related to development of inclusive education (Johnsen, 2013).

Our study is a case study of an innovative programme of inclusive education, which is realised in twelve regular primary schools in cooperation with a special school in Serbia. In this programme, special educators from the special school provide support to pupils and teachers in regular schools in their development towards inclusive education (activities through which the support is provided are listed in Rapačić, Nedović, Stojković, & Ilić, 2014). From eight main curricular aspects which are defined by the Curriculum Relation Model, and which are investigated within the joint project of comparative classroom studies (Johnsen, 2013, 2014), our study focuses on the following two: the legislative context of inclusive education in Serbia, and communication in inclusive classrooms. The methods used in our study are legislative document analysis, interviews with teachers and school principals and non-participant observation of classroom processes. In the following, the results obtained by each of these methods are presented.

## Legislative framework

Since 1994, when UNESCO adopted the Salamanca Statement on Principles, Policy and Practice in Special Needs Education and a Framework for Action which promotes the idea of the importance of the inclusive education in building an inclusive society (UNESCO, 1994), educational policy and practice in many countries has moved in a more inclusive direction (Mittler, 2000). In accordance with this international trend, Law on the Foundations of the System of Education of the Republic of Serbia (LFSES) established in 2009 has brought a range of formal opportunities concerning inclusion of children with disabilities into regular schools. We will shortly summarize these new formulations in the law: *Persons with developmental disabilities and other disabilities* have the right to education in accordance with their educational needs in the system of regular education, in the system of regular education with individual and/or group support, as well as in special preschool groups and schools, according to this law and the laws on preschool ( The Law on the Preschool Education, 2010, Article 34), primary school ( The Law on the Primary Education, 2013, Articles 56, 64) and secondary school education ( The Law on the Secondary Education, 2013, Articles 4, 12).

**Institutions and other organisations.** LFSES regulates the following institutions in which education is realized: preschool education – preschool institutions; primary education – primary regular schools and schools for pupils with disabilities, secondary education – secondary regular schools and secondary schools for pupils with disabilities (LFSES, 2009, Article 27). Some of the special schools are boarding schools, providing accommodation and meals to pupils.

Schools for pupils with disabilities, may in addition to educational process within the institution, provide additional support to children and adults with special needs in preschool group, regular school and in family context (LFSES, 2009, Article 27).

Elementary school and secondary school may in addition to realisation of regular curriculum, realise individual educational plans for children and adults with disabilities (LFSES, 2009, Article 77). The innovation included in the present law is that elementary and secondary school curricula contain recommendations for the creation of individual educational plans for pupils who need additional educational support (LFSES, 2009, Article 74).

**Individual educational plans.** From the school year – 2010/2011, pupils with disabilities are not entitled to special curricula in accordance with the type and level of disability, but may be enrolled into the system of regular education. Related

to that is the new legislative regulation concerning individual educational plans. According to LFSES (2009, Article 77) an individual educational plan is created by a school for the child who needs additional educational support. An individual educational plan should be created for each pupil who needs additional support as a consequence of social deprivation, developmental or other disabilities, or due to other reasons. The law determines that educational support, besides the implementation of the individual educational plan, includes overcoming of physical and communicational barriers to inclusion. *The aim of the individual educational plan* for a pupil with disabilities is the achievement of his/her optimal inclusion into regular educational process and into peer group and development of his independent functioning. The individual educational plan determines a suitably adapted and enriched education, i.e. it determines means of adaptation of content and teaching methods and a schedule of daily activities within the preschool group or school class. The daily schedule is created so that it permits periods of additional individual or group support. The frequency of additional support is supposed to be predetermined by the individual educational plan.

According to LFSES (2009, Article 77) the individual educational plan should contain educational goals and standards which are defined in accordance with characteristics of the pupil. The individual educational standards may correspond to regular class standards, or may be individually developed for some or all academic subjects, in which case reasons for deviation from regular standards should be explained.

The individual educational plan is delivered by an educational collegium of the school, based on a proposal given by a team for inclusive education. The team consists of school teachers, school psychologist or pedagogue, a child's parent or a foster parent and pedagogical assistant if a child has one. Parents or foster parents have an additional role in the child's education according to the new law regulations, as he or she gives consent to the realization of the individual educational plan (LFSES, 2009, Article 77). According to the LFSES (2009, Article 77) the realization of an individual educational plan is supervised by the ministry of education. Individual educational plans should in accordance with the law (LFSES, 2009, Article 77) be created and assessed every three months during the first year of school attendance, and at the beginning of each semester.

**Teachers, educators and professional services providers.** According to the law, the process of education in primary and secondary schools is realised by teachers. School psychologist and school pedagogue are called professional service providers and schools employ either one of these professionals or both. The law

states that, depending on the school and curricula needs, professional work may also be performed by a social worker, defectologist, logopedist, or andragogue (LFSES, 2009, Article 116). The Law introduces, in addition to assistant teacher, the pedagogical assistant whose role is to provide help and additional support to pupils, teachers, educators, and professional service providers in the process of education of children with disabilities (LFSES, 2009, Article 117). In this way, they contribute to the advancement of inclusive education process.

## Findings based on interview data

A semi-structured interview was developed for the purposes of this study. The interview questions cover the following topics: 1) support provided to pupils with special needs and teachers in the teaching-learning process; 2) challenges met by teachers in the development towards inclusive education; 3) regular school teachers' and principals' opinions on the effects of inclusive education in different areas of development of pupils with and without special needs; 4) their opinions on factors which contribute to successful implementation of inclusive practices.

We present some of the results obtained by interviewing twelve regular school teachers and twelve regular school principals who participated in the innovative programme of collaboration between regular schools and the mentioned special school. The complete findings of the study are published in Serbian language (Rapaić, Nedović, Ilić & Stojković, 2008).

One of the main principles of inclusive education is the principle of individually adapted teaching (Johnsen, 2008). For that reason, we investigated what kinds of curriculum and teaching methods adjustment are employed by regular teachers in the education of pupils with special needs. Teachers from our sample report that they use the following forms of adjustments: creation and implementation of individualized curriculum in cooperation with special educators from the special school "Milan Petrović" and school psychologists of the school adapted teaching methods and reduced achievement demands in certain subjects according to pupils' abilities. Frequencies of answers regarding are presented in Table 1.

Further, we investigated: What are the challenges, additional demands and responsibilities met by regular schools in the process towards inclusive education, according to the experience of teachers and school principals. Teachers

**Table 1.** Adjustments made for pupils with special needs in inclusive education process

Adjustment	Teachers (N=12)
Creation and implementation of individual curriculum	7
Adaptation of teaching methods	1
Reduction of achievement demands in certain subjects	4

and principals express that they face various challenges during the process of inclusive education. The most frequently reported challenges are 1) the inability of pupils with special needs to satisfy regular curriculum demands, 2) lack of defined achievement criteria for those pupils, 3) insufficient knowledge of appropriate teaching methods, and 4) problems of distribution of time for work with disabled and nondisabled pupils. They also report high demands toward teachers (e.g. preparation for lessons, need for additional education), large numbers of students in classes, challenges met in communication with pupils with special needs, too high expectations of parents of pupils with special needs in regard to their child's achievements and inadequate physical setting (Table 2.).

**Table 2.** Challenges in the development towards inclusive education

Challenges	Teachers (N=12)	Principals (N=12)	Total
Inability of students to accomplish regular curriculum demands	3	11	14
Lack of defined criteria for students' achievement	5	1	6
Insufficient knowledge of appropriate teaching methods	2	2	4
High demands toward teachers	1	4	5
Challenges related to communication	1		1
Large number of pupils per class	1		1
Too high parental expectations		1	1
Inadequate physical setting		1	1

Attitudes towards inclusive education of teachers and other persons working at school are an important factor, which influences the efficacy of the innovation process and the well-being of children involved (e.g. Lindsay, 2007). We asked teachers and principals to describe attitudes towards inclusive education of other

teachers and school staff. According to their opinion, attitudes are varied, and usually more positive among teachers who teach in lower grades (one to four) than in higher grades. Some of them suggest that this difference in attitudes may be related to lower capabilities of pupils to satisfy achievement demands, which are larger in higher grades. One school principal suggested: "Teachers who have negative attitudes probably need experience in working with pupils with special needs to realize that academic achievement is not the only aim of inclusive education".

Teachers and principals have also been asked about the attitudes of other pupils toward pupils with special needs. The majority of them (20, out of 24) state that these pupils are well accepted among peers. They report that other pupils often help them and give them praise and encouragement. They also mention that children with special needs socialize with schoolmates outside the school setting. According to them, workshops designed in cooperation with special educators with the aim to promote the acceptance of children with special needs among other children, have significantly contributed to pupils' positive attitudes. One of the school principals and two teachers say that although the majority of pupils accept well children with special needs, there is a small number of pupils who reject them and express hostility.

Interview questions were also related to teachers and principals' opinions on the effects of inclusive education in the areas of academic achievement and socio-emotional development of pupils with special needs and of other pupils. Concerning the academic achievement of pupils with special needs, all teachers and principals state that it is below the achievement of other children due to lower learning capabilities of these children. Two teachers suggest that their academic achievement would possibly be higher in a special education setting due to the smaller number of pupils per class and the fact that teaching staff in these schools possesses more knowledge and skills for teaching these children. All teachers and principals express the opinion that there is no influence of inclusive education on learning achievement of nondisabled pupils. However, two teachers add that although they have not noted problems in realization of regular curriculum, they question themselves whether other pupils are deprived in the teaching process: "I feel guilty that I haven't been able to give them enough attention because it took me a lot of time to work with the pupil with special needs" and: "I sometimes reflect on whether I provide enough support to other pupils".

With respect to the socio-emotional development of pupils, all teachers and principals consider that the effect of inclusive education on pupils' with special needs development is very positive. According to them, inclusive education

better enables pupils to develop communication and social skills than special education provisions. One of the teachers expresses the opinion that social development should be the primary goal of education for pupils with disabilities. Teachers and principals also think that nondisabled pupils' socio-emotional development is also positively affected by inclusive education, which promotes their tendencies toward empathic responding and altruistic values. In their words: "Children learn to respect differences and that every human being is of equal worth". Interview questions were also related to teachers and principals' suggestions regarding possibilities for further development of the process of inclusive education. Their recommendations are summarised in Table 3.

**Table 3.** Recommendations for the promotion of the process of inclusive education

Recommendations	Teachers (N=12)	Principals (N=12)	Total
Cooperation with special schools	5	7	12
Additional teachers' education	7	4	11
Special educators' employment in regular schools	1	3	4
Promotion of nondisabled pupils acceptance of pupils with special needs	2		2
Promotion of positive attitudes of school staff	1		1
Cooperation between teachers	1		1
Cooperation with school psychologists and pedagogues	1		1

The majority of informants assume that in order to promote the process towards inclusive education, cooperation between regular and special schools should be strengthened, and special educators employed in regular schools. They also suggest additional education of regular teachers for work with pupils with special needs. In their opinion, further development of programmes aimed to promote positive attitudes toward pupils with special needs among peers and regular school staff would be beneficial. Further, they think that inclusive education may be improved by developing closer collaboration between all persons who take part in it, i.e. teachers, special educators, school psychologists, pedagogues and parents.

## Findings based on observational data

In studying the innovative programme towards inclusive education, our main focus is on communication within inclusive classroom. We were guided in this

choice by the cultural-historical approach to learning in context which was pioneered by Vygotsky and which presents a theoretical framework of the overall project of comparative classroom studies (Johnsen, 2013, 2014). According to cultural-historical approach, social interaction has a major formative influence on child-development. Following this approach, Ivić (2014) develops the idea that three components of didactic interaction within inclusive classroom have significance for understanding and promoting inclusive education: interaction between teachers and pupils; interaction between pupils themselves; and interaction between the knowledge to be acquired by pupils and the pupils who adopt the knowledge. In the observational part of the study, our focus was on the interaction between teachers and pupils and between pupils themselves.

According to observational data, the type of organizational structure mostly used in inclusive classrooms is whole class instruction (70.01% of the time). It is followed by individual work (21.43%) and group work, which occupies a small proportion of time (5.80%).

Following categories of interaction patterns are prevalent during whole class instruction: teacher's monologue, pupils' presentation and questions/answers. Teacher's monologue (e.g. lecturing, storytelling, reading aloud) occupies most of the observed time (23.50%). Pupils' presentations occur on average 17.31% of the time. Question/answer sequences between teacher and pupils aimed to check pupils' knowledge and insight take place during 12.18% of the time.

Teachers give individualised guidance and supervision during 19.97% of the time, and group guidance during 0.85% of the time. They involve the whole class in individual pupils' questions for 2.56% of the time.

When we look at the activities of pupils with disabilities, the following pattern occurs: they are engaged in presentation (e.g. reading aloud, presenting assignments) during 2.14% of the time, they take part in question/answer sequences for 0.85% of the time and they receive individual guidance from teachers for 9.50% of the observed time. These data suggest that pupils with disabilities take an active role in classroom. They also show that teachers devote a large proportion of time to give individually adapted guidance to pupils with disabilities (9.50% of time to them and 10.47% to other pupils).

With respect to different types of tasks pupils with disabilities are supposed to be engaged in, they spend approximately half of the time on the same tasks as other pupils (52.55%), and a quarter of the time on tasks related to individual curriculum (24.66%). On average, they spend small proportions of time on tasks related to a grade lower than their current grade, and on tasks related to general

educational curriculum, but which are different from other pupils' tasks (6.46% and 1.70% respectively). These results are similar to the results obtained by Soukup et al. (2007) who reported that pupils with mental retardation and other developmental disabilities worked on grade level standards during 60% of observed intervals and on individualized education plan objectives during 23% of intervals.

We were interested to investigate the level of pupils' engagement in learning tasks. The level of engagement was operationalized as the ratio between the time in which a pupil is working on a task and of the time planned for that task. The data show that pupils with disabilities are actively engaged in the same tasks as other pupils for 88% of the planned time, whereas they work on tasks related to individual curriculum for 62% of the planned time. These data may indicate that tasks related to general curriculum in which pupils with disabilities are involved are suitably chosen in a sense that pupils are motivated to work on them. On the other side, the level of engagement of pupils on tasks related to individual curriculum is lower than it would be expected based on the premise that these tasks are individually adapted to their learning abilities and educational needs. One possible explanation is that motivation for learning of these pupils is lowered due to their perception that they are working on tasks different from other pupils. Further, closer examination is needed on contextual factors which possibly interfere with their engagement on individual curriculum tasks, such as what type of activities other pupils are engaged in during the time in which they are working on tasks related to individual curriculum. The inspection of the collected data shows the following pattern: pupils with special needs are actively engaged in these tasks in the context of classroom organisation for working with individual tasks. This engagement is additionally strengthened by teachers' individual guidance provided to the pupil and during time periods immediately following that guidance. On the other side, pupils show lower levels of engagement in tasks related to individual curriculum in the context of the whole class instruction, i.e. during teacher's lecturing, other students' presentations and question/answer sequences between teacher and other students. In such contexts, pupils' work often shows an intermittent character: short periods of engagement and non-engagement frequently follow one another.

Wehmeyer et al. (2003) define accommodation provided to pupils as any support that may help pupils accomplish the task, but does not change or modify curriculum itself. Our data show that accommodations for pupils in the form of peer support and the use of assistive technology occur during 14.45% of the observed time. Adaptations were coded in accordance with Wehmeyer et al.

(2003), focusing on when the pupil was involved in an activity that was similar to the rest of the class, but was adapted in a way that made presentation or representation of the content different from that of the other pupils' activities. Adaptations were made during 9.4% of the observed time. The levels of adaptation and accommodation are relatively low compared to results obtained by Soukup et al. (2007) who reported accommodations during about 67% of observed intervals and adaptations during 17.63% of intervals.

Engagement of special educators in the learning process of pupils with disabilities was coded independently of other types of accommodations in our study. It took place on average during 10.62 % of the time. Special educators engaged predominantly when pupils with disabilities were involved in the same tasks as other pupils, i.e. in tasks related to general curriculum. The data show that the level of pupils' engagement in such tasks is the highest possible (100%) when special educators' support is provided to them.

The data obtained concerning communication of pupils with disabilities with teachers and other pupils show a picture of positive relationships and acceptance. In their communication with teachers, pupils with disabilities take an active role: they often initiate conversation, ask teachers to help them and to check whether they have accomplished tasks correctly. Teachers frequently praise pupils with disabilities for their achievements and encourage them verbally to work on tasks. Furthermore, as shown in relation to coded data, they devote much of the time to individual guidance of these pupils. For example, as one of the observers has noted "the pupil is working only when the teacher stands next to him and helps him to concentrate on the task". Together with teachers, other pupils often praise their classmates with disabilities for their presentations. Interaction unrelated to learning is also present among pupils (e.g. chatting). No instances of negative relations such as quarrels or ridicules have been noted by the observers.

Observation has yielded evidence that other pupils provide help to pupils with special needs to accomplish learning tasks when asked by teachers or spontaneously. According to Vygotsky (1983), asymmetric didactic interaction is a formative factor of cognitive development. Ivić (2014) suggests that this type of interaction occurs within the class, both between teacher and pupils and between pupils who are on different levels of cognitive development and/or who possess different levels of knowledge of a certain subject. Our data on support given to one another to accomplish learning tasks show that asymmetric didactic interaction between pupils, in comparison to whole class instruction and individual work is relatively infrequent in the observed classes.

## Conclusion

The aim of our study was to analyse the possibilities for inclusive education of children with special needs prescribed in the legislation of the Republic of Serbia, and to investigate an innovative programme of inclusive education, which is realised in cooperation between regular and special schools.

We used interview and observational method to obtain data on the programme of inclusive education, following the principle of triangulation (Robson, 2002). The picture of the programme that emerged through data analysis shows that pupils with special needs are supported within regular schools embraced by the programme in varied ways. Individual curricula have been created and implemented for some of the pupils with special needs and adaptations and accommodations have been used in the teaching process. Engagement in learning tasks of pupils with special needs, as our data show, varies as a function of organisational classroom structure and teaching methods. Their level of engagement is high when they work on the same tasks as other children and when they work on tasks related to individual curricula in the context of individual work and under the close supervision of regular teacher and special educator. With respect to social relations between pupils with special needs and their peers, positive attitudes and acceptance are predominant. However, as teachers and school principals pointed out, further developments are needed in order to promote the process of inclusive education. They have suggested numerous aspects of the process that may be improved. Most important, teachers should be better supported in the process of creation and implementation of individual curricula. This could be realized through the engagement of special educators in regular schools and through additional education of regular teachers in the field of special education.

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# Inclusion for Deaf and Hard of Hearing Pupils in the School System of the Republic of Slovenia

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## Project findings

To study inclusive practices means to explore and analyse educational practices in view of what inclusion is – what the normative for inclusion is.

In accordance with the general concept of inclusion defined and described in this project, we define inclusive education as the system where all children can learn together and have equal rights in mainstream schools. Such schools welcome all children with their unique individual characteristics, interests, abilities and learning needs; all children with and without special needs and disabilities; a school combating discriminatory attitudes, and offering a meaningful and individually adapted education to every pupil within the community of the class” (Frederickson & Cline, 2002; Johnsen, 2000; UNESCO, 1994 in Johnsen, 2007). The UNESCO (2009) definition states that inclusive education is:

“... an ongoing process aimed at offering quality education for all while respecting diversity and the different needs and abilities, characteristics and learning expectations of the students and communities, eliminating all forms of discrimination” (p. 3).

It is thus clear, that thinking has moved on beyond the narrow idea of inclusion as a means of understanding and overcoming a deficit and it is now widely accepted that it concerns issues of gender, ethnicity, class, social conditions,

health and human rights encompassing universal involvement, access, participation and achievement (Ouane, 2008).

The denial of one single truth is one of the basic postulates of the post-modern era. While the modernists were striving for the objective truth, the objective of the post-modernists was the shift from the explanatory towards the plural approaches to discussions, trying to identify the multitude of small things, which influence the opportunities of the individuals with special needs. The post-modern era raises moral standards, such as the ethics of concern and the ethics of justice. While we have been aiming at the truth so far, the modernists are striving for the best practices. Consequently, also the paradigm of the system of education and schooling for children with special needs has changed due to the raised awareness and respect for the rights of every human individual. In this connection, we can say that the education of the deaf and hard of hearing population has significantly changed. This is a particularly deprived group of people with special needs, which encounters many problems in building up knowledge, getting professional education as well as insufficient employability due to communication problems. At the same time this is a very heterogeneous group due to a) different hearing remains, b) the time period in which their hearing started to deteriorate, c) their narrower and broader social environment, which may enhance or inhibit the individual in his communication development and consequently in his social realisation as an individual human being.

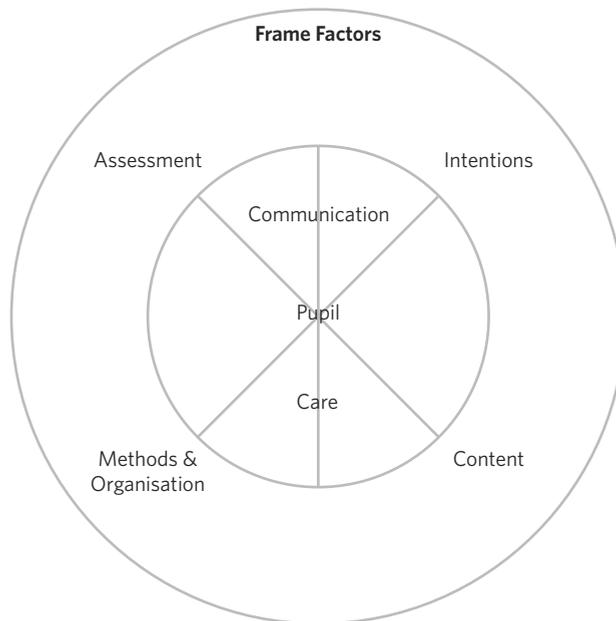
Following the doctrine (the international principles of human rights as stated in UNESCO documents, UN Convention on the Rights of Persons with Disabilities,...), the school system in Slovenia has been significantly changed. People with special needs of different levels and types of impairment were integrated in a uniform school system. Different programs, which were introduced, should be adapted to these different needs, further systemic professional assistance, the possibility of adaptation of the organization of work, and internal differentiation within lessons should be provided.

Several studies showed the positive impact of the environment in the sense of empathy and devotedness. However, individual differences do emerge, yet the process of performative integration of the deaf pupils is most effective; differences are observed between the emotional and social integration of individual deaf pupils. Compensatory therapeutic programs and programs adapted to their individual disabilities contribute largely to their performance. The inclusion of deaf pupils in the mainstream schools did not have negative impacts on their hearing peers. (Schmidt & Čagran, 1998). Regarding the social situation of

deaf individuals, the research results proved to be contradictory. Peršolja (1997) established that there are no differences between hearing and deaf pupils in their social inclusion in the classroom community and further, no differences between both genders at both the lower and the higher primary school level were observed. However, the trends of weaker social inclusion of deaf pupils than their hearing peers at the higher level are recognized.

Schmidt (1997) considers the attitudes of the teachers toward the integration of children with special needs as an important element of their successful inclusion in mainstream primary school. The author identified six important factors contributing to successful inclusion, such as the presence of special education teacher in school, forms of schoolwork, emotional and performative characteristic traits of children with special needs, assistance of parents and special education teachers, the volume of knowledge, communication of children with special needs, and the social status of children with special needs.

We can also see inclusion as a global policy prescribing development towards a local regular school that welcomes all children with their unique individual characteristics, interests, abilities and learning needs; all children with and without special needs and disabilities; a school combating discriminatory attitudes,



**Figure 1.** *The Curriculum Relation Model* revised in Johnsen (in press 2007)

and offering a meaningful and individually adapted education to every pupil within the community of the class (Frederickson & Cline, 2002; Johnsen, 2000; UNESCO, 1994; WB 04/06 in Johnsen, 2007).

Figure 1 illustrates the main interest of the international research project this study is a part of, with an overview of eight focus areas of the research. The areas or frame factors are knowledge about the pupil/s, the four classical didactic aspects – educational assessment, intentions, content and method & organisation, communication and care.

## **Inclusion for deaf and hard of hearing students**

We all live in one world, persons with special needs and persons without. We could name the world an inclusive world. The aim of this inclusive policy is to include the deaf and hard of hearing persons in the local environment, meaning inclusion in the local kindergarten or school, where the deaf or hard of hearing person lives. This raises the question: «Are the teachers ready for this challenge?» The fact is, that some schools are ready to accept deaf and hard of hearing pupils and other not. Teachers in mainstream schools are very well educated for such work, but less competent and educated in a field of deafness, communication strategies and related knowledge and skills. Consequently, they may not be able to recognize the need of deaf and hard of hearing pupils and give them relevant support and help. Inclusion is a process for all, whatever the hearing status is. Inclusion needs to be between deaf, between deaf and hard of hearing and between hearing and deaf and hard of hearing as well as all other persons. Inclusion consists of communication and interaction, but for deaf and hard of hearing individuals inclusion can be perceived as a problem due to lack of relevant communication. Communication is a two-way process with the aim of including all participants in a society, community or class. Communication is not only important for education, but primarily means of social interaction. Accordingly, it is obvious that the use of false or unsuitable approaches of communication and unmodified teaching is far from inclusive practice and it leads to misunderstanding and disharmony.

This study presents reflections about current educational system, asking whether it is ready for an inclusive school and able to offer educational inclusion – not only on paper, but also in practice – for traditional minorities when it comes to communication, such as deaf and hard of hearing pupils. We also look globally and in lifelong perspective. That means that the inclusive school

and inclusive society does not finish at the age of 18, but it is present the whole life of deaf and hard of hearing people and therefore should become a way of their and our living.

The study is not constructed as a critic to mainstream teachers, because their work is mostly oriented towards pupils without special needs. The intention with the study is to be a reflection on current educational system and on a society, which is mostly oral and auditory oriented. Inclusion for the deaf and hard of hearing is therefore a very big challenge for our society.

## Research description

The project is a combination of different research approaches. We have focused on the deaf and hard of hearing population. Within this group, we discuss cultural diversity and different approaches in working with deaf and hard of hearing persons. We have tried to include as many deaf and hard of hearing persons as possible (trying to analyse the complete Slovenian deaf and hard of hearing adolescence population that was educated in mainstream and special schools). Because of different research aspects, the samples varied from one research to another, depending on which aspect was covered. In the aspect of communication, there were 110 deaf individuals from 5 to 23 years, in the aspect of socialisation, inter-cultural communication and self-esteem there were 102 deaf individuals from 15 to 23 years and concerning the aspect of the inclusion process there were 67 teachers involved in the research. We mainly focused on the adolescent population where we have tried to get as much relevant data from deaf and hard of hearing adolescents as possible. We have been interested in data that represent the essence of deaf and hard of hearing people in a hearing world, such as the importance of sign language, well-being, living together in the same world, teaching methods and strategies.

## Aspects of the inclusion process

The aim of the study was to analyse what kind of adaptation the schools implement and mainstream teachers apply in schools where deaf and hard of hearing pupils are (deaf and hard of hearing persons can attend different educational programmes). We were interested in teaching processes, were didactic aspects such as level of communication, language and material were adjusted to the needs of deaf and hard of hearing pupils. Our purpose was to define and evalu-

ate educational conditions for or considerations about mainstreamed deaf and hard of hearing children. We have analysed educational environment including didactic and methodical considerations, acoustic environmental classroom considerations, supporting teams and timing considerations, where the deaf and hard of hearing children participated or were involved.

The sample represented 67 mainstream teachers from 25 to 59 of age (61 women, 5 men). Each of them had one or more deaf or hard of hearing pupils in their class. There was 60 educational workers, teachers, pre-primary teachers and professors. In addition, different specialists were available for extra help, three speech and language therapists, one special educator, two psychologists, one social worker and one teacher. The research focus was on exploring important classroom-interaction adaptations such as communication adaptations, language/cognitive considerations, curriculum considerations, instructional considerations, special adaptations and use of technology. We gathered basic data about teachers and about specific considerations. These data represented independent variables, while dependent variables was oriented into specific considerations concerning school content.

**Conclusions and implications.** Summarising the findings, the conclusion was that beside the rehabilitation content of additional professional help, deaf and hard of hearing pupils need educational support. That means that deaf and hard of hearing pupils need extra time and support to understand some of the tasks within the educational content, such as interpretation of some tasks, more instruction and language interpretation, in order to reach the academic aims and standards. If additional professional help is implemented only once per week per pupil and if the education process is more orally and hearing oriented and less visually and multi-sensory, there is reason to expect that deaf and hard of hearing pupils will have serious problems with attending education as well as the social life of regular educational institutions. The need for social identification with deaf culture and the sign language is crucial. Hence, the findings raise doubt as to whether educational practice has been properly adjusted to deaf and hard of hearing pupils. We can say that only academic achievement or academic aims should be evaluated and they are part of additional help. However, also the rehabilitative aims should be as important as educational ones, because the rehabilitative achievement are prerequisite. Based on the frame factors illustrated above as the main research interest, the discussion about inclusive practices for the deaf and hard of hearing people contain the following topics:

- Deaf and hard of hearing pupils are members of a very heterogeneous population, each of them has their own needs and can attend different educational programmes. As a heterogeneous group, they are included into a variety of schools with from 14 to 1200 children or more explicit as one deaf in a group of 7 or 33 other pupils in the class. The class is often acoustically inappropriate, meaning that the level of noise ratio is too high and disables the receiving of the direct speech signal.
- The communication process in the schools is based on verbal communication (listening, speech reading, writing and reading). Non-verbal communication is present on a small amount and it is conditional with the expression of individual – teacher or pre-primary teacher and not with the aim to increase understanding for all. Neither sign language nor usual gestures are used. The verbal direction come from the hypothesis, that deaf and hard of hearing people master the Slovenian language, which is only partly the case, because they need to create the language in specific conditions and circumstances.
- Teachers do not use visual material much. Their average use are schemes, films, models, pictures and photos. However, several teachers in the elementary grades (1-6 grade) use visual materials. In lower and upper secondary school, the teaching process is mostly based on verbal communication and because of that, visual material is not used much. Some of the educational aims are oriented towards reproduction of word (-speech) messages.
- According to social care, deaf and hard of hearing pupils can attend different educational programmes in Slovenia. The programmes are more academically than rehabilitative oriented. Our suggestion is that they should be more sensitive concerning rehabilitative aspects. The care consists of organised additional professional help for deaf and hard of hearing pupils, and is given relatively often, depending upon choice of programme, and it covers all who are involved in the educational process – the pupil, the parents and the teachers.

The results indicate that there is no clear vision concerning supporting deaf and hard of hearing pupils based on their potentials and independent ways of learning and living that is the aim of being included into the broader society. However, the results represented, insist on a past system and process of integration, where deaf and hard of hearing individuals adjust their lives to the hearing population. Thus, the realisation of the principle of inclusion (UNESCO, 1994) does currently not represent benefits for deaf and hard of hearing pupils or represent a social answer to actual needs of deaf and hard of hearing individuals.

## Communication

The Most's study (2007) emphasized the importance of good speech intelligibility not only for basic communication but also as a factor that affects the child's social and emotional development. The results in the Polat's study (2003) revealed that speech intelligibility as an index of communication ability, was positively associated with all dependent variables of the Meadow/Kendall Social and Emotional Adjustment Inventory (1980). The author claims, that as long as the communication mode of communication used enables deaf students to express themselves, it will result in a healthy overall development, both academically and psychosocially; the positive feedback from others may result in positive self-esteem and the deaf person may feel part of a larger social network. Considering that disorders of both speech and voice occur in the speech of hearing-impaired speakers, we focused on the communication process of deaf persons. The aim of the research was to stress that the intelligibility of speech does not depend only on articulation but also on some other voice, speech and respiratory factors. The speech production of 91 deaf subjects was analysed. Speech, voice and acoustic parameters were assessed and a rehabilitation programme was constructed.

In early infancy, hearing loss significantly affect the development and intelligibility of speech in children with hearing impairment. Assuming that both speech and voice disorders occur in the speech of hearing-impaired speakers, the study analyses the speech and the overall intelligibility of 91 hearing-impaired speakers (5 to 23 years, 44% female and 56% males). We have recorded the subjects' speech with a Sony (DAT) digital recording device; model number TCD-D8, using a Sony microphone, model number ECM-719, and digital tapes. We have placed the microphone at a distance of 30 cm in front of the subject's mouth. The sound samples consisted of 5-10 minutes of reading/naming a closed set of words/pictures from the Slovenian three-position test for evaluating articulation of first-grade students. The CoolEdit96/CoolEdit2000 program was used to prepare the recorded material and Praat and Speech Analyzer programs were used for analysing the resulting sound files.

**Conclusions and implications.** The results of the study are useful in general speech therapy and not only for hearing-impaired speakers, since the training in one of several elements of speech can bring improvements in overall speech production. In speech therapy, articulation is not the only goal. Correct breathing, good phonation, overall good chaining of segments, velopharyngeal func-

tion and good control of the larynx can lead to intelligible speech. By developing and improving all the elements of speech production, the goal of sufficiently intelligible speech in deaf or hard-of-hearing subjects can be achieved. Speech does not only mean good articulation, but rather a coordinated pneumo-phono-articulation-hearing system. All of these segments can affect a child's psychosocial wellbeing. If there is a good communication between hearing, deaf, and hard of hearing people, the effect of successful communication is achieved. The concluding thought is that good speech intelligibility is important not only for the basic communication but also as a factor that affects the child's social and emotional feelings.

## Socioemotional wellbeing

This study has dealt with risk factors for health and socialisation that are characteristic of the deaf and hard of hearing adolescent population in Slovenia. One aim of the research was to examine and describe difficult periods of adolescence and to identify possible connections between the individual areas of health and socialisation. The research included 102 deaf and hard of hearing youth in the ages from 16 to 24 years, who attended mainstream or special secondary schools.

Different authors described the adolescence as a period in which the individual has to cope with a series of developmental tasks. It is a time of exploration and testing. Therefore, we could consider risk taking to a certain extent as a natural form of behaviour (Tomori, 1995) for the hearing as well as for the deaf and hard of hearing adolescents.

Because of their specific way of communicating and because they belong to a specific minority culture, the deaf and hard of hearing represent a special group of people. In the socialisation process, our goal is to integrate deaf or hard of hearing youth into the hearing environment. This should be done as naturally as possible and in harmony with others. The process encompasses several objective and subjective factors that contribute to different levels of social development. One of the most important is without doubt the right kind of communication (Schirmer, 2001).

In Slovenia, little research has been carried out in the area of health and socialisation risk factors of the deaf and hard of hearing. In spite of the fact that extensive knowledge of these factors pertaining to the hearing world in Slovenia and abroad is gained from research and in depth studies, the findings cannot simply be transferred to the area of deafness and hearing impairment.

Our research covered the deaf and hard of hearing adolescent population as the first of its kind in Slovenia and at the same time the only one, which has provided an insight into the deaf population of adolescents.

**Conclusions and implications.** The results established that deaf and hard of hearing adolescents have lower self-esteem and higher degree of depression compared to results concerning hearing adolescents. The difference in self-esteem, between the groups is statistically significant concerning the impact of hearing loss, sex, school programme and code of communication. All of these results show that it is necessary to consider the specific needs of the deaf and hard of hearing while inviting them into the mainstream schools. For some of them it is a great opportunity, but for other not. Deaf persons should be together so that they can develop their culture, values and behaviours. Culture is a pattern of beliefs, values, arts, behaviours, social forms, institutions and knowledge that are characteristic of a community. That is very important for deaf persons.

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# Supporting Pupils with Speech and Language Impairments in Regular Primary Schools in Bosnia and Hercegovina

## *Presentation of Findings*

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## **Introduction**

This article contains an overview of findings from two purposefully selected primary schools participating in this study<sup>30</sup>. Focus is on answering the main question regarding both participants' and researchers' perceptions of the support provided for pupils with speech and language impairments in regular classrooms employing methods to achieve inclusion. In the following, qualitative data are analysed and presented from each of the two research schools, School A and School B. The first part of the presentation consists of a general overview of each school's background and context and a general impression of knowledge, attitude and practice concerning inclusion. In the second part, data are organ-

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30 For more information about the study, see the research plan (Zević, Čehić, Džemidžić Kristiansen & Hadžić, 2013) and methodology chapter (Zević, Džemidžić Kristiansen, Hadžić & Čehić, 2014).

ised according to findings within main categories of the research phenomena based on selected aspects of the teaching and learning process<sup>31</sup>.

## General findings related to the two research schools

### School A

This school maintains a very open and positive atmosphere towards inclusive education and all new working methods that have been introduced to the school's administration and educational practitioners. Several domestic and international projects have been realised in this school, the results of which have led to a significant increase in teachers' skill levels when working with pupils educational needs. The innovation project described in the book "The Classroom towards Inclusion – Dialogue about Good Examples and Difficult Dilemmas in Development of Inclusive Practices" (Johnsen et al., 2007) was implemented over a period of two years in School A, and it offered educators new teaching approaches and strategies for working with children with language difficulties through introducing new expertise.

Logopedy, music therapy, psychological and pedagogical work focusing on socialisation and peer support all contributed to changing the classroom atmosphere to a more positive one. The teachers introduced new working methods in the entire group (class) aiming to include the support of children with language impairments in a discreet manner.

The entire process of introducing inclusive education was facilitated by a school team cooperating in planning and practicing, consisting of pedagogues, social worker, logoped or speech therapist, psychologist and teachers together with the parents of pupils with special educational needs.

Considering that this school is located in an environment with a significant number of Roma children, inclusion had to be approached very carefully in order to convince Roma-speaking children to attend school and their parents to cooperate. Thus, parent education, workshops for parents and visits from the children's families in cooperation with a social welfare centre were prepared and carefully executed. The team of experts planned workshops with lectures and

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31 The pupil/s, Assessment, Educational intentions, Educational content, Class organisation and teaching methods, Communication, Care and Frame factors; The Curriculum Relation Model is developed by Johnsen (2001; 2007).

socialising between parents, pupils and teachers and led by pedagogues. Professional development workshops for teachers were organised by the school principal along with a planning expert. The main topic was how to work in inclusive classrooms. It must be noted that these workshops used to be open for a wider circle of experts from other schools, with visiting scholars from the Department of Special Needs Education, University of Oslo, who offered their vast theoretical and professional experience to the staff. There is reason to believe that as a result of these former activities, the teaching staff at School A has already developed a high level of sensitivity when it comes to promoting inclusive practices, positive attitudes towards children with special needs in the regular classroom and an understanding of the phenomenon of inclusion in a wider context. The teachers show increased levels of self-awareness concerning their multiple roles as not only educators but also mediators, initiators and coordinators in their inclusive work with their pupils. Interviews reveal not only the positive relations between pupils and teachers in spite of their differences, but also the high level of special support provided during the teaching and learning process applying new study material. They also reveal that most of the pupils come from families that are considered to be in the low-income group. There is a significant number of Roma pupils and that the school is a pioneer when it comes to implementing education for Roma children in the development of an inclusive school setting. The school participates in fruitful cooperation and receives a great deal of support from the NGO sector and special needs educational institutions as well as local welfare centre, youth centre, support teams from specialised institutions, playrooms with organised programmes, etc. In School A the teaching staff has recognised the need for making changes in classrooms and infrastructure related to universal mobility and to develop the school's IT systems and technical equipment, as well as adding new literature to the existing collection.

The school has adopted new teaching approaches, special support programmes and peer support (pupil-pupil and teacher-pupil) programmes. It is affiliated with higher education institutions; Faculty of Education (Pedagoska Akademija) and Faculty of Philosophy, University of Sarajevo, that have both implemented professional skills updating projects for practicing educators and schools where special importance has been assigned to inclusion, logopedy or speech therapy, reading and writing acquisition and certain segments of special needs education. Several of the staff members and administration in School A have visited surrounding schools as well as schools in Norway, Finland and Sweden. All of this has contributed to the development of important changes in

working with children with special educational needs such as speech-language difficulties. The standardisation level of teaching content has increased significantly, which is not the case in many other schools in Bosnia and Herzegovina. When it comes to organisation, the subject lessons are not timed at an obligatory 45-minute sessions, and teaching methods are adjusted to children with special needs. Pupils work in groups and pairs; many of the classes take place outdoors, and everyone is included in extracurricular activities. Thus, School A has a very positive approach and practices highly accepted inclusive education of its diversity of its variety of children with very different levels of accomplishment and needs. This approach has been made possible due to the cooperation and support of the school's expert team members together with its logoped and special needs educator or defectologist from a collaborating institution.

## School B

This school is located in a suburb of Sarajevo. It is a gigantic school containing 2,500 pupils and encompassing a wide and densely populated area. When it comes to the openness of this school to inclusion, we indicate that it was introduced to the practice a few years after the city school. Therefore, while we have encountered positive attitudes towards inclusive teaching, there also appears to be a lack of faith among school staff members in the success of working with children with special needs. In recent years, the school has been bypassed by authorities several times as they have implemented similar projects. This is one of the main reasons why this school was purposely selected for the project.

Our first initiative upon our arrival at the school was to meet with the school staff and present them with an introduction to the process of educational inclusion. Both the school administration and teaching staff accepted the idea of cooperation and were eager to learn about new approaches and methodology for working with children with speech-language difficulties. In order to investigate the ways in which School B has supported children with special needs, we analysed results gathered through interviews, observations and insight into accessible documentation of selected main categories (pupil – teacher – school – environment – specialised support – educational methodology) and detailed subcategories in accordance with the nature of the researched content and qualitative analysis (Zečić, Čehić, Džemidžić Kristiansen & Hadžić, 2013). The very phenomenon of support has been observed from the perspective of the need for stimulation among staff members and pupils, and the possibilities for developing the school

inside the community in a wider context, so that it could advance its educational opportunities and social conditions in the sense of improving the provision of quality "services" to its pupils. Focus is on the teachers' estimates about the need for an inclusive approach while working with pupils with speech-language difficulties and the needs of the pupils themselves (socialisation, acquiring new skills within the areas of verbal communication, reading and writing). These aspects are related to the fact that there are more support resources to learning in the teaching process of pupils with speech-language impairments in School B than are present in the class, school, local community, family and wider social environment. Further, as concerns the teachers' attitudes, we have found a combination of moral values, emotions, sense of responsibility and activities along with a constant consideration of their pupils through involving their personal emotions and thoughts. In School B changes in traditional organisation of the school day are not found. For example, the subject lessons still last for 45 minutes with no regard to the children's various learning abilities, and there are no individually adapted teaching programmes for pupils. While teachers' relationships with their pupils is protective and maternal, pupils show limited involvement and activity during lessons. We also find that teachers worry about pupils – especially those who have language impairments – within different school subjects when the time comes for them to advance to a higher class level. The needs for individualisation and content differentiation in accordance with the Bloom taxonomy of goals are not sufficiently met. Thus, a general characteristic of these findings is that we can only speak of an individualised approach to working with children with speech and language difficulties. The school needs increased resources in teaching- knowledge and skills, including skills in colleague cooperation and cooperation with other experts as tools for professional development and self-evaluation in the process of planning and practicing inclusive teaching. Internal resources and external dimensions in the school's environment point to a dire need for further upgrading and education in these areas so that teachers may be able to build a strategy for the process of inclusion. Detailed observations revealed a need for upgrading within several aspects of inclusive education. Fortunately, the school staff was positive to participate in a series of lectures and with interactive workshops. The following topics were presented:

- “Individualisation in teaching” by Professor Dr. Sadeta Zečić
- “Inclusion” by Professor Dr. Sadeta Zečić
- “Children with special needs” by Professor Dr. Sadeta Zečić

- “Individualisation in teaching” by Master of Philosophy in Special Needs Education Selma Džemidžić,
- “Types and characteristics of speech-language disorders in school children” by logoped/speech therapist Selmir Hadžić
- “Parent support” by Master of Education Irma Čehić

The cooperation between the research team and School B was intense; workshops and lectures were held at prearranged times and dates with a varying audience of teachers, parents or merely school administrators. The subsequent evaluation of lectures and workshops showed a high level of satisfaction from the participants and a need for further education of teachers in the area of innovation and inclusion in the educational process.

Cooperation with parents showed itself to be more complicated. Parents are a very important resource for supporting children with language difficulties. However, during this project they did not always attend meetings, displayed “traditional” attitudes towards inclusion as well as unrealistic expectations. These factors indicate a need for finding new ways of cooperation between the school and its pupils' families (home visits, inclusion of parents as partners while respecting their individual personalities, continuous cooperation and timely information as well as affirmation of the polite speech workshop).

The school administration was connected with higher education institutions, recommending that its teachers attain a four-year higher education degree that will provide them with adequate knowledge in logopedy, special needs education, family education and other inclusion programmes through trainings, workshops, seminars, research papers, projects and other information.

The local welfare centre has become a necessary link in the chain of cooperation between families and the school supported by our team. However, it is not sufficiently involved in the developmental project of School B. There are no workshops, day care centres or ambulant support services for children in School B's immediate surroundings. Our research team has therefore started visiting the families of these children and will attempt to create a team (teacher, parent, and pupil) in order to help the child and the class environment. The Centre for Rehabilitation of Speech and Hearing is an important institution that should help this school. However, it is located in a long distance from School B and, consequently, it does not provide any services for children with speech-language impairments. As described above, the study of inclusive practices in School B developed into a research and innovation project.

## Presentation of categories

This part presents an overview of findings from the two schools related to 1) the teacher, 2) the pupil, 3) teaching-learning methodology and 4) specialised support. The tables present summaries of views expressed, discussed and related to sub-categories within each main category. The findings are based on reported views/acknowledgements and discussions expressed within School A and School B.

**Category: TEACHER. Data showing similarities in the following areas:** The teacher is the most important agent on which the quality implementation of inclusion depends. The essential key role of the teacher in the process of inclusion is acknowledged by the teachers, as they perceive it, as well as by parents and pupils. This is the researchers' main impression from this study. In both School A and School B, there are high expectations to the teachers and their different roles when meeting the needs of each child. This is especially found when it comes to our target group of pupils with special language needs. The teachers in both schools jointly express their need for further advancement. They acknowledge that they are in danger of professional burn-out and that their professional and social status is not sufficiently valued (prospects of professional advancement and financial reward are not sufficient) Further, they point to difficulties related to the implementation of a curriculum that is too comprehensive and to their expanding role outside the classroom. They request more time to fulfil their teaching tasks and continuous support from experts within different areas, and they acknowledge that their usual partners are the school administration and expert services.

**Table 1.** Findings concerning views on the role of the teacher related to support of individual pupils in the class

Subcategories	School A	School B
Teacher-pupil relationship	Direct and immediate, frequent in different activities, peer and parent support; indirect relations support (posters, materials, home visit, mediators between institutions)	Marked by a protective, maternal attitude, insufficient involvement in activities throughout the class. Well-developed eye contact, body language
Communication	Affirmatively toned, with maximum usage of written forms of communication (memos, notifications, informer, bulletin board, "moving notebook"....)	Marked by warmth and care for the student. Communication with parents clear and direct (parents as passive information receivers)

Subcategories	School A	School B
Education	Teachers develop competencies for inclusive education through programmes of professional advancement (knowledge, skills, attitudes, values).	All teachers have higher education degrees (4 years of studies). Lack of seminars from inclusive topics.
Attitudes	Attitudes differentiated in relation to target groups, students, parents, teacher colleagues, levels of authority/local/ministries/NGOs	Attitudes focused on areas (distance from cities – rural areas, attitudes concerning time dimension, professional burn-out) Positive attitudes towards inclusion and involvement in class
Teachers' personality/working style	Continuity in professional development reflects stability and implementation of what was taught in the classroom. Openness, flexibility, care for the student and most important, a professional inclusive approach	Differing expectations in the work towards inclusive classrooms, differing teacher personalities (in the context of inclusion). Visible motivation in work recognised by the school administration.
Teacher – parent	Different roles of parents in the school. Parent as a mediator during the creation of inclusive policies and mobilising the community to support the school	Awareness of the importance of parents and their involvement as partners. Existing resources and prospects of advancement in the area of parenting and partnership with the school

**Category: PUPILS. Data showing similarities in the following areas:** Directing attention towards the individual pupil, both research schools emphasize that pupils with special educational needs are visible in the class and active in the learning process. Classmates interact in various activities with pupils with special needs, either in traditional or innovative methods and learning. The schools acknowledge the need for support from professionals and institutions in the local community for individual pupils with special educational needs and their families. They also point out that there is a lack of continuity and cohesion among teachers regarding their work and competency levels. It is very important that teachers work continually and on a daily basis in accordance with an inclusive approach to the teaching and learning process in the classroom.

**Table 2.** Findings concerning views on pupils' relations and activities at school

Subcategories	School A	School B
Peer support	It occurs in both indoor and outdoor activities. It happens spontaneously. Initiative comes from peers. It is necessary to develop social skills more.	It is visible through implementation of group work. More mediation is needed from teachers in learning situations.

Subcategories	School A	School B
Communication	It is encouraging and supportive in presentation situations. Participation presented with feedback from pupils and teachers	It is direct, usually question-answer. There is more room for conversation among pupils.
Curricular and extra-curricular activities	Pupils are eager to participate in indoor and outdoor activities and thematic projects.	Participation in school clubs, local manifestations of children with special needs.
Parent	Participation of children and parents in joint activities. Sensitisation of parents for cooperating with specialised institutions for speech correction.	Parents are acknowledged resources that need to be activated and they are open for cooperation.

**Category: TEACHING-LEARNING METHODOLOGY.** *Data showing similarities in the following areas:* Observations reveal acknowledgement of teachers' creativity and well as their motivation to support the work of children with special educational needs. The content of the teaching is adapted to pupils' needs (dynamic, scope, volume). There is also additional teaching and learning sessions at school and in homework. There is a visible relationship between school subject and learning content. Various teaching aids are applied to support the obvious understanding of the study content.

**Table 3.** Findings concerning teaching-learning methodology

Subcategories	School A	School B
Environment	Furniture rearranged for group work. Several children's works. School library. Vivid colours in the classroom. Visible bilingual signs.	Furniture new and traditionally arranged. Spacious classrooms with lots of light. Visible children's works – drawings
Approach	Individualisation of content (Bloom's taxonomy). Different roles in group work (adequate)	Very warm, maternal relation in working with pupils. Individualisation in relation to pupils with special needs emphasised.
Time frame	Activities within 45 minutes, but also those without time limits of one school hour. Pupils do not react to bell marking the hour is finished.	Activities clearly divided to one school hour.
Working methods	Visible innovative methodologies. Work on the text emphasised, animating the discussion between teacher and pupils.	Frontal work forms with partial group forms when pupils work individually or in pairs on the same tasks. Positive traditional practice.

Subcategories	School A	School B
Activities	Playing in the function of learning. Multimedia activities.	Swapping different activities during the class in order to encourage pupils with special needs in their individual participation.

**Category: SPECIALISED SUPPORT.** *Data show similarities in the following areas:* This aspect directs the attention to one of the focus areas of the research project, namely the educational process of pupils with speech-language impairments. Thus, "Support to pupils with speech-language impairments in regular primary schools" was observed in more than one way. Pupils with different kinds and degrees of speech impairment were purposely selected for the project. Direct or indirect assessment as well as specialised support were performed by the experts participating in the project. As mentioned previously, all second-grade pupils (now attending fifth grade) with speech-language impairments belonged to "the target population" of the study. However, only three pupils in each school were selected for an in-depth study over the course of the project. These pupils may be seen as the main target group in a holistic research and innovation project in order to find the best form of support in inclusive regular classes. Pupils from school A with the following impairments or difficulties were selected: a) speech fluency disorders, b) bilingualism and c) dyslalia. From school B we selected pupils with a) bilingualism, b) pronunciation difficulties and c) dyslexia and dysgraphia. All these pupils had undergone complete speech-language ability assessments. After the initial estimate of the degree and form of their speech-language difficulties, data concerning the expert help and support present were gathered by means of recording and analysing class recordings, interviews, questionnaires and informal conversations. The following presentation has been divided between the two research schools.

**SCHOOL A** has – within different projects, seminars, round tables, etc. – largely educated its teaching staff about children with speech impairments and children with special educational needs in general. As participants in the Norwegian-Bosnian project *Institutional Competence Building and Cooperation with Two Bosnian Universities: "Special Needs Education towards Inclusion (SØE 06/02)* over a span of three years, they also had speech therapy directly applied in their school. Moreover, the project provided them with a new and upgraded approach and support for these students compared to other schools in the Sarajevo canton.

Teachers teaching in subject classes have participated in further education and training for working with children with special educational needs. It is also important to emphasise that this school has an expert team consisting of the principal, pedagogue, psychologist and (occasionally) a social worker. This is an important factor for the development of inclusive practices in the 'school for all'. The number of pupils with special educational needs attending the school is rather high, referring to the number of children with speech-language impairments in need of logopedic help. Direct expert or special needs educational support was provided for these children for only two years in the current project (WB 04/06) during which time mobile teams of defectologists or special needs educators from institutions in the Sarajevo canton occasionally visited regular primary schools in this area, including this school. However, this support to pupils with special needs consisted, as observed, mostly of detection and assessment of special educational needs, together with counselling of teaching staff and parents. Children with speech-language impairments primarily receive logopedic help in medical polyclinics, centres for speech and hearing rehabilitation or through private treatments. An advantage for all schools in the area of Sarajevo is that these centres are in the city, while pupils in the suburbs often miss this special needs educational support in logopedy due to the distance they live from these centres.

Since the beginning of the SØE 02/04 project, School A has participated in cooperative projects with internal and external educational staff with expertise in a number of relevant areas of special needs education and inclusion. Opportunities for special needs educational support and schools and pupils' access to these are listed below:

- a) *Special needs educators or defectologists within different areas.* Previous studies, estimates and available data indicate that School A has had a significant number of children with different kinds of special educational needs, including speech-language difficulties. Current proactive legislature provides these pupils with the right to hire special needs educators or defectologists and include them in schools' internal expert teams<sup>32</sup>. This school employs one special needs educator. Since 2004, the school's vice-principal has a Master of Philosophy in Special Needs Education with

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32 Parliamentary Assembly of Bosnia and Herzegovina, 2003. Okvirni zakon o osnovnom i srednjem obrazovanju u Bosni i Hercegovini [Framework Law on Pre-primary Education in Bosnia and Herzegovina], Sarajevo, Parliamentary Assembly of Bosnia and Herzegovina, 2003. [http://www.mcp.gov.ba/zakoni\\_akti/zakoni/?id=676](http://www.mcp.gov.ba/zakoni_akti/zakoni/?id=676)

expertise in development and implementation of individually adapted curricula and inclusive practices. She is a member of this study's research team. For the time being she is the only special needs educator amongst the school staff.

Special needs educators with specialisation in logopedy have periodically been part of the school staff during the two abovementioned cooperation projects (SØE 02/04; WB 04/06). Formally speaking, children with speech-language impairments from the entire city, including pupils from school A, only have rights to logopedic educational-rehabilitation help in medical centres, centres for speech and hearing rehabilitation or in one of the existing special institutions.

- b) *Medical support.* Physiotherapeutic, neurological, neuro-psychiatric and other medical services that are necessary in the process of educating and rehabilitating children with special needs are only available for School A pupils in public and private medical institutions in the city.
- c) *Social worker and psychologist support and cooperation.* A great improvement and a positive incentive to the overall process of inclusion in School A was introduced by hiring a social worker and psychologist to be members of the school's expert team. This has been achieved through different projects supported by the Ministry of Education of Sarajevo Canton, to which School A's administration regularly applies.
- d) *Expert team (internal and external).* School A has a large expert team headed by the principal whereas, for several years, a mobile expert team from one of the special institutions in the area of Sarajevo has been providing external support and cooperation with the school's internal team members, including its vice-principal and teachers, with a focus on development of inclusion.

**SCHOOL B** is, as mentioned, a suburban school about 30 kilometres away from the centre of Sarajevo. The school has a large number of pupils, and a significant number of children with special needs. As an innovative part of the research project aiming towards development of inclusive practices, members of a mobile expert team from Sarajevo canton visited the school several times. Their main activities consisted of identifying and diagnosing children with special needs, which was far from enough help to provide any sort of support that these children needed. Through using a questionnaire, interview and spontaneous conversations, we have learned that the teaching staff of School B is extremely dissatisfied with the process of inclusion so far,

as well as with all forms of expert help during the realisation of the project. The possibilities for special needs educational support and the access to these are listed below:

- a) *Special needs educators or defectologists within different areas.* Despite the abovementioned high number of pupils, School B does not have any special needs educator or defectologist who can support pupils with special educational needs as well as teachers, parents and the school's expert team. In the above-mentioned project regarding mobile teams in Sarajevo canton, this school only received an estimate of the number of pupils with various difficulties without receiving any further assessments or professional advice. This means that there were no external assessments from other institutions on behalf of the school system. When it comes to logopedic or speech therapeutic support, the distance of the centres and institutions in which children with speech-language impairments could receive help is one of the greatest challenges both the school and the local community faced. Apart from that, no project or other kinds of actions had been realised in the school except for the activities described above related to this project.
- b) *Medical support.* All medical services for children with special needs can be obtained in the local health centre or in one of the specialised institutions in the city of Sarajevo. It is important to emphasize that children with special needs often receive no privileges or other benefits while seeking medical aid or treatment.
- c) *Social worker and psychologist support and cooperation.* School B does not have any permanently employed psychologist or social worker. Rather, expert help of this kind is hired on the grounds of young trainees' employment projects, and these engagements are short-term. The school's administration acknowledges the need for these experts, and they are actively seeking a solution that will allow them to employ at least one of the two.
- d) *Expert team (internal and external).* The internal expert team of School B consists of the principal, the pedagogue and part-time and occasionally hired psychologist and social worker. An external expert team with the task of providing continuous support to pupils with special educational needs does not exist. The only support the teaching staff receives regarding inclusion is through attending various lectures related to the development of inclusion organised by various NGOs, pedagogical institutes, etc.

## Summary

The research results demonstrate the value of Vygotsky's cultural-historical mediation concept, which includes: 1) Professionals and laypersons are mediators in children's learning (teachers, special needs educators or defectologists, parents, internal and external support team and counsellors). 2) Specific places enable meetings and dialogue (classrooms, school, out-of-school environments, specialised institutional support, etc.). 3) Procedural provision of support creates opportunities to learn and further develop across pupils' different levels of individual mastery and zones of proximal development as is acknowledged in several cases (Vygotsky, 1978).

Research findings reveal information about teachers' abilities<sup>33</sup> to respond to the multiplicity of differences between pupils in the diverse classroom. As concerns pupils with special educational needs and their teachers, our research focuses on teachers' ability to acknowledge and assume appropriate attitudes towards pupils with speech and language impairments, an ability that implies their commitment and caring for these pupils.

This research on practices in our two purposefully selected case schools reveals a change in mentality as well as adaptation of teaching and learning activities. There has been a tendency to emphasise the question of how to change the pupil in order to adjust to the school's requirement. However, the new concept focuses on how to adapt all educational subjects in order to provide support to pupils with special needs as equal members of the school and classroom community, and how to provide adequate support in the educational practices related to socialisation as well as learning and development. Thus, over time the two schools have changed their activities as well as organisation in order to support their inclusive practices.

The study reveals that teachers are aware of their role in a) developing and appreciating all pupil capabilities, not only the academic ones; b) organising activities in the classroom so that all children can participate according to their abilities; c) understanding that each and every child in the classroom is their responsibility; d) working in cooperation with parents and experts in different fields, such as special needs educators or defectologists – including speech therapists or logopeds – as well as pedagogues, psychologists, social workers and

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33 Razdevsek-Pucko points to competencies as a set of knowledge, skills and values necessary for every individual in order to act as a successful member of the community (Educoop, 2007). <http://www.uni.edu/coe/inclusion/standards/competencies.html>

other relevant professionals, in order to understand the abilities and strengths of the individual child and explore what strategies, methods and teaching styles respond to their educational needs, and e) showing a high level of tolerance for any uncertainties, doubts and difficulties as well as flexibility; and ultimately – through cooperation – to find ways to prevent professional burn-out.

We also found that along with the many similarities in the shifts occurring in professional mentality and practices, there was a distinct difference between the two schools. At the beginning of the study, a certain number of differences were expected without knowing beforehand. As mentioned, the case schools were purposefully selected for two main reasons; methodologically and ethically: Methodologically, selecting two different cases is expected to reveal more nuances of the case description than if the selected cases are similar. Ethically it was a question of fairness to invite School B into this international project, as it was a school that had been bypassed in all international project invitations since the end of the last war. Thus, School A had been in the professional upgrading and innovation processes towards inclusion since 2002 or even earlier, while School B's participation in this project was its first collaborative project. As mentioned, the findings from interviews and informal talks with the educational staff in School B indicate that they display a fundamentally caring attitude towards their pupils which was present before the project's start, and a changing attitude towards the possibilities of educational inclusion during the project (along with impatience when it comes to questions of resources) in order to overcome the challenges in the process of developing inclusive practices. Thus, School A is an example of a school that has developed inclusive practices over the course of several years, while School B exemplifies a school in the beginning of such development. A longitudinal follow-up study of the schools is expected to answer questions concerning further development of inclusive practices, access to relevant and necessary resources, and, eventually, in what way developing inclusive practices become sustainable.

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# Provision of Education and Rehabilitation Support to Children with Special Needs in Regular Classrooms

## *Presentation of Findings*

Nevzeta Salihović and Alma Dizdarević

## **Introduction**

Securing of education and rehabilitation support for children with special needs in regular classes is a question of their rights, and many schools in Bosnia and Herzegovina are faced with the problem of adjustment of the entire education system to their special educational needs. Individual plans and programs are in focus of education for children with special needs and they are one of the important factors that contribute to the successful inclusion and better success in the regular educational environment. Planning and securing of adequate support to children with special needs through identification of the levels of potentials and learning opportunities for children with different special needs, individual training programs, adequate instructional procedures, and individualized methods of assessment are significant steps to meet the challenges of children with the special educational needs in inclusive classrooms. The main goal of this research is to explore how a school develops individually adapted education for pupils with special needs in cooperation between special needs educators, regular teachers and school administration (Salihović, Dizdarević & Smajić, 2013). An implicit goal is that this study may clarify how to upgrade teachers for their role in development of inclusive educational practices.

Citation of this chapter: Salihović N. and Dizdarević A. (2020) Provision of Education and Rehabilitation Support to Children with Special Needs in Regular Classrooms. N. Salihović and A. Dizdarević (Ed.), *International classroom studies of inclusive practises* (pp.151-164/pp.162-175 in print edition). Cappelen Damm Akademisk. <https://doi.org/10.23865/noasp.122>  
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## Participants in the study

The sample included consists of 97 subjects divided into four subsamples:

1. **Subsample of pupils with special needs** consisting of 6 pupils with special educational needs (intellectual difficulties, speech-language difficulties, hearing impairment, behavioral disorders, motor disorders and chronic diseases and visual impairment), aged 8-13 years
2. **Sub-samples of pupils without educational difficulties** consisting of 81 pupils in regular classes together with pupils with special educational needs
3. **Subsample of parents of pupils with special educational needs** consisting of 6 parents of pupils with special needs of both genders
4. **Subsample of teachers of pupils with special educational needs** consisting of 4 teachers of both genders, teaching regular class with pupils with special needs. Research results of all 6 case studies are presented through four phases: 1) adaptation of the environment, 2) the collection and sharing of data, 3) focus on the creation and writing of individualized education and rehabilitation programs and 4) implementation and respectively presentation of the results of monitoring.

## Results

**Adaptation of the environment.** Skjørten (2001) states that adjustment of the environment is of great importance for creating the environment that will readily accept and support each pupil. Adaptation of the environment is a question of awareness about the different needs of pupils and knowledge of how to respond to those needs. At this stage, it was important to decide who will participate in a school team, explain the role of individual team members and define their responsibilities and assignments. The team was made up of people who possess the knowledge and skills to identify pupils' abilities, interests and needs and to create a plan that will be consistent with them. The school team consisted of students, parents and school personnel (teacher, pedagogue/psychologist), and experts of appropriate specialty for each case study (educators-rehabilitators, speech and language pathologist and expert for hearing impairments, social pedagogues). Members of this team were very important in making decisions in the process of individualized education and/or rehabilitation planning.

**Collecting data.** Collecting and processing data about participants consisted of collecting, interpreting and consultation of various data with the aim of adapting the activities required for setting and achieving goals and sub goals for each pupil with special needs. The team collected data through observations of pupils in the classroom and at home, through interviews and informal discussions with parents, teachers and peers; by using tests and scales and through analysis of documentation during the evaluation process.

Each team member who worked with a pupil gave important information on an informal level, about reactions, behavior and success. It should be noted that the consultation during the whole period of research were important in collecting related to instruction and assessment strategies concerning the individual pupils. During this process, parents also gave their perspective of development and learning, and then the former teachers and experts, the pupils themselves, as well as other experts who were consulted (e.g. educator-rehabilitator, speech and language pathologist, expert on hearing impairments and social pedagogue).

Process of support it selves and the observations process provided information about the learning process of the pupil in different situations, including:

- orientation in everyday situations and responding to specific activities
- operation in a group or independently
- learning style
- reaction to different instructional strategies.

These data related to pupils' current level of functioning formed the basis for the determination of specific educational goals and served as basis for assessing their achievement during and at the end of the research period. Test results are presented in a clear and unambiguous manner. All information was presented in a form that was understandable to all team members, especially parents and pupils. The data were synthesized and summarized in a profile for each pupil. Because the profiles included an extensive and a concise description of the pupils' current level of development, it served as a reference for the team in determination of needs and specific performance goals for the Individual Education and Rehabilitation programs. Profiles contained the following information: general information about the pupil, health and socio-economic data, description of academic achievement, adaptive behavior description, description of the pupils' functioning at home, school and with peers, description of learning strategies and motivation, and the opinion of the expert team about the level of support and proposed measures, ending with the names of all participants of the school team, including the director.

**Creating and implementing Individual Education and Rehabilitation Program.** As the basis for creating Individual Education and Rehabilitation Programs we used the full content of the pupils' profile as described above. Team members also passed their observations of each child's needs. It is very important to mention that the individual education and rehabilitation programs were not only descriptions of every objective for the proximal steps in the pupils' learning process, but also a summary of the most important priorities for long-term learning and future work. In selecting priorities the team discussed the pupils' full development, keeping in mind the following:

- the pupil's values and goals
- parental values and goals for the pupil
- urgency of need
- contribution to the overall achievement and transfer to different program areas
- the important social development
- benefit for other contexts
- duration of instruction and available resources

**Selection of strategies.** After team members had decided goals and sub goals, discussions were undertaken regarding instructional strategies. By strategies in meant what the teacher needs to do during classroom routines in order to support the set goals and sub goals of the pupils, since well-developed and systematically applied instructional strategies are important components of service and support for children with special needs in the inclusive classroom.

The team proposed strategies for children directly linked with the goals and sub goals previously decided. The current level of academic functioning of the pupil in each program area was described in the program for each of the pupils with special educational needs. This information was contained in the profile that is completed in previous phases and it was the basis for the team planning. Identifying the pupil's current level of success in every area was essential for the appropriate selection of specific objectives, determining methods for adaptation of materials, instructional strategies and assessment procedures as well as assessment of the pupil's progress.

**Evaluation of applied individual education and rehabilitation programs.** In order to implement the program successfully for each pupil and encourage them to learn, the team for each pupil with special educational needs determined which instructional strategies and assessments to use, as well as the kind of support each pupil needs. The plan was primarily concrete, realistic and linked to the pupil's daily schedule. Effective implementation was a dynamic process

that first of all involved cooperation during assessment of the individual pupil's learning progress, identification of changes of the learner's needs as well as revision and review of the daily plans.

Thus, activities and main objectives in the individual program were transferred to detailed daily plans and linked to the current daily instructions in the classroom. The daily plan for each pupils with special needs is designed to serve as an instructional guide, securing data about the pupil's current educational environment, provide communication among team members, provide for mechanisms that note the student's progress, helping staff to make decisions about the effectiveness of strategies and materials and provide for division of responsibilities. In this way, the pupil's individual learning strategy is explained so that the teacher can adapt the teaching to him or her. If the pupil's progress is very weak or even not at all, the team set themselves the following questions:

- Are the strategies applied as planned? If not, is there some unpredictable problem?
- Are there alternative strategies and resources that may increase the efficiency?
- Do the selected assessment activities support the pupil to achieve sub goals?
- Should sub goals be divided into smaller parts or steps?

Based on such informal discussions, team members decided re-examinations of sub goals, strategies and/or resources continuously instead of continuing with inefficient modes of work until next team meeting.

The team met to formal examination when indicated in the program. The process revision of plans consisted in some cases of return back to previous stages of individual program:

- Collecting additional information
- Revision of the learner's specific goals or sub goals
- Establishing new strategies of instructions and assessment
- Getting help from other experts.

**Results of the monitoring.** The regular curriculum is adapted to the needs of pupils with special needs who had learning disabilities that have cognitive difficulties in adopting and applying knowledge (**child with intellectual difficulties**), and for the students who had learning disabilities without cognitive delay and only need the methodical modification of curriculum content (**child with speech and language difficulties; child with hearing impairments; child with behavior disorders; child with mobility disorders; child with visual impairment**). Each student was evaluated based on criteria related to individual

characteristics and goals set in the individual educational and rehabilitation program. Dynamic assessment was used as a manner of long-term monitoring and evaluation of programs. On this basis, short-term goals was periodically revised and changed in accordance with the team's decisions when found necessary. The progress of the six case pupils with their different difficulties is shown in the following tables and accompanying discussions.

**Characteristics of behavior of pupils with special educational needs** in different contexts are presented on the basis of 6 variables for behavior assessment. Initial and final data on the assessment of behavior of the 6 pupils by the teacher, were collected on a sample of 4 teachers who were in their classes (Teacher assessment). Initial and final data on the assessment of behavior were collected on a sample of 6 parents of pupils with special needs- variable (Parent assessment). Self-assessment was performed of the 6 pupils with special needs and the results were displayed by variables (Assessment of student- home, Assessment of student- school, and assessment of student- peers). Acceptance of students with special needs in regular classes was assessed using a sociometric questionnaire on the sample of 81 pupils without disabilities-variable. Table 1 presents initial and final results for all six variables presented in standard values, where estimates of behavior that ranges from 8-12 points are interpreted as average behavior, less than 8 points indicate below average behavior and above 12 indicate above average behavior.

**Table 1.** The results achieved at the Scale for assessment of behavior-II

	CID		CSLD		CHI		CBD		CMD		CVI	
	I	F	I	F	I	F	I	F	I	F	I	F
Assessment teacher	7	12	11	12	15	15	3	7	10	12	10	11
Assessment parent	7	10	12	12	12	15	8	12	9	10	13	13
Assessment student – home	7	10	10	10	13	12	4	8	15	14	12	11
Assessment student – school	4	8	11	10	14	14	11	12	14	13	10	11
Assessment student – peers	6	8	13	11	12	12	13	13	15	12	10	8
Sociometrics	8	5	6	6	14	14	3	3	10	10	6	3

Legend: I-initial, F-final; CID-child with intellectual difficulties; CSLD-child with speech and language difficulties; CHI-child with hearing impairments; CBD-child with behavior disorders; CMD-child with mobility disorders; CVI-child with visual impairments.

Analysis of the initial assessment of all 6 case studies, indicate that at the beginning of the research period pupils with intellectual disabilities and behavioral disorders were acquired the lowest points, but that assessment of these case pupils in the final changed significantly in their favor in the final measurements. However, the low sociometric position of these students remained topical, which is confirmed by numerous other studies conducted in our country as well as internationally. Kuhne and Wiener (2000) point out that the low position of children with special needs held stable over time for various reasons, and state that the child's position in the group depends, among other things, of success in school, the level of social cognition, friendly and collaborative behavior and physical appearance.

The results in connection with the *examination of adaptive behavior after the application of individual educational and rehabilitation programs* in all 6 case studies show improvements in all areas of the first part of the Adaptive behavior scale, with high scores in some areas over 70 centile indicate a positive result, as shown in Table 2.

**Table 2.** The result achieved at part I of Scale for assessment of adaptive behavior

		CID		CSLD		CHI		CBD		CMD		CVI	
		I	F	I	F	I	F	I	F	I	F	I	F
1	Independence	20	50	80	90	90	100	10	50	10	60	70	80
2	Physical development	10	10	60	90	10	20	50	70	10	10	40	60
3	Usage of money	30	30	80	80	80	80	70	70	40	50	60	70
4	Communication	30	60	60	70	50	50	10	70	40	60	90	90
5	Numbers and time	40	30	80	80	100	100	60	90	50	70	90	90
6	Activities at household	50	50	80	90	100	100	60	90	40	50	90	90
7	Self-initiative and perseverance	20	40	70	80	40	90	40	60	80	80	50	60
8	Social interaction	60	50	80	90	100	70	20	60	80	80	60	70

Legend: I-initial, F-final; CID-child with intellectual difficulties; CSLD-child with speech and language difficulties; CHI-child with hearing impairments; CBD-child with behavior disorders; CMD-child with mobility disorders; CVI-child with visual impairments.

**Table 3.** The results achieved in part II of Scale for assessment of adaptive behavior

		CID		CSLD		CHI		CBD		CMD		CVI	
		I	F	I	F	I	F	I	F	I	F	I	F
1.	Tendency to violent behavior and the destruction	90	60	60	50	30	40	100	70	50	60	80	70
2.	Antisocial behavior	90	40	60	30	20	20	100	60	20	30	70	60
3.	Resistance against the authority	70	50	70	30	20	30	100	70	20	30	70	60
4.	Irresponsible behavior	70	40	60	50	40	60	100	50	50	50	60	60
5.	Withdrawn behavior	40	50	80	60	40	50	20	30	40	40	40	50
6.	Stereotyped behavior and mannerism	90	80	90	70	50	60	100	60	80	70	60	60
7.	Inappropriate habits in contact	100	50	70	60	50	60	100	70	60	50	60	70
8.	Unacceptable speech habits	90	80	60	50	50	50	100	80	50	50	60	60
9.	Unacceptable and unusual habits	100	40	80	50	40	50	70	50	50	60	50	60
10.	Behavior directed against himself	100	K	60	70	70	40	100	70	80	60	70	70
11.	Tendency to hyperactive behavior	80	80	90	70	40	50	70	70	60	50	40	50
12.	Psychological disorders	40	30	70	70	10	20	100	70	10	10	80	70
13.	Drug Use	70	70	80	70	70	80	60	70	70	60	70	70

Legend: I-initial, F-final; CID-child with intellectual difficulties; CSLD-child with speech and language difficulties; CHI-child with hearing impairments; CBD-child with behavior disorders; CMD-child with mobility disorders; CVI-child with visual impairments

From Table 2 it is evident that the most significant improvements are noted in the areas of independence, communication, self-initiative, perseverance and social interaction. When we look at the first part of the scale in relation to the activities and habits of everyday life, we can see that the success or progress in one area somehow managed to motivate the child to be successful in the other areas that are covered by this scale. Through observation and direct work with the pupils with special needs and providing of education and rehabilitation support, it was noted that all the pupils liked to initiate contacts in activities and insist on tasks, but usually when the other person working with him or her show them by the approach that he or she is interested in the activities that they are doing. Experience of success in school activities contributed to promotion of confidence for all pupils, which, as is evident from the results of the scale, develop positive results to other areas.

The results in the area of *no-adaptive behavior*, after the application of individual educational program and ensuring of training and rehabilitation support for pupils with special needs in regular schools, also showed improvement in several areas of the AAMD Scale part II, where the result placed in 80 centile or more indicates the presence of undesirable forms of behavior, as shown in Table 3.

Table 3 present behavior displayed at the beginning of the assessment and after application of individual educational and rehabilitation programs, indicates improvements in all variables of II part of AAMD scale for all the pupils. The initial measurement noted the greatest difficulties in pupils with behavior disorders and those with intellectual disabilities, which is understandable given the type and degree of difficulty and level of required support. After the initial assessment for all pupils followed by development and implementation of the individual programs, the pupils began to receive assignments that were adapted to their interests and abilities. This seems to have led to an increase in concentration on the tasks that they are given. Special attention is also devoted to fostering social relationships with peers and closer social environment, which allow positive interaction of pupils with special educational needs and, as a result, contribute to reduction of undesirable behavior.

Because all communication disorders carry the potential to isolate the child from its educational environment, it is important to find appropriate and timely intervention. The area of language ability was monitored using Expressive scale of the Bosnian language, which was adapted for the purposes of this research. The results achieved in testing semantics are presented in Table 4.

**Table 4.** Results achieved on tasks for testing of semantics

	CID		CSLD		CHI		CBD		CMD		CVI	
	I	F	I	F	I	F	I	F	I	F	I	F
1. Receptive Vocabulary	63,64	81,81	100	100	81,81	100	81,82	100	100	100	90,91	100
2. Expressive Vocabulary	40	50	60	90	30	50	30	50	90	100	50	90
3. Definitions	0	33,33	0	66,66	0	16,67	66,67	66,67	83,33	100	33,33	66,66
4. Categories	50	50	50	50	50	50	50	50	100	100	83,33	100
5. Associations	0	0	50	100	0	0	0	66,66	83,33	100	66,67	83,33
6. Comparison and contrast	0	16,67	0	100	0	0	16,67	33,33	66,66	83,33	16,67	33,33
7. Sequential story (Step A)	100	100	100	100	100	100	100	100	100	100	100	100
8. Sequential story (Step C)	0	50	100	100	100	100	0	100	100	100	0	100
9. Story telling	0	16,67	16,67	100	0	16,67	100	100	100	100	33,33	66,66
10. Explaining procedures	0	33,33	0	100	33,33	66,66	33,33	66,66	83,33	100	33,33	66,66

Legend: I-initial, F-final; CID-child with intellectual difficulties; CSLD-child with speech and language difficulties; CHI-child with hearing impairments; CBD-child with behavior disorders; CMD-child with mobility disorders; CVI-child with visual impairments.

**Table 5.** Results achieved on tasks for testing of syntax

	CID		CSLD		CHI		CBD		CMD		CVI	
	I	F	I	F	I	F	I	F	I	F	I	F
1. Receptive level of syn. and gram.	75	83,33	83,33	91,67	75	83,33	66,67	91,66	75	91,67	91,67	100
2. General expre. syn. and gram.	25	50	75	100	100	100	100	100	75	100	100	100
3. Sex/ tips words	0	50	75	87,5	0	25	75	75	50	75	50	87,5
4. Possessive pronoun	0	50	80	80	0	50	60	60	60	80	80	100
5. Number	0	20	80	80	20	20	60	80	60	80	60	80
6. Case tips	28,57	50	100	100	28,57	50	85,71	85,71	85,71	100	100	100
7. Comparative and superlative	0	33,33	100	100	100	100	0	66,66	66,66	100	0	100
8. Verb time	44,44	66,66	88,89	100	33,33	44,4	44,44	100	88,89	100	88,89	100
9. Development sentences	0	22,22	50	66,66	22,22	38,89	38,89	44,44	66,66	83,33	83,33	100

Legend: I-initial, F-final; CID-child with intellectual difficulties; CSLD-child with speech and language difficulties; CHI-child with hearing impairments; CBD-child with behavior disorders; CMD-child with mobility disorders; CVI-child with visual impairments.

From the presented results, we can see that there has been a significant improvement for all pupils on the semantic variables under influence of applied programs and provided individualization in work, and with use of specific instructional strategies in the work of teachers. Given that communication skills are the core of educational experience, professional support to the teachers contributed to establish communication goals for all pupils with special needs. The results achieved in the tasks of syntax testing are shown in Table 5.

Similarly, the language test results of syntax in all 6 case studies show significant progress by the pupils with special educational needs in all 9 variables. Considering the fact that communication has many components, which mainly serve to improve the ways children learn about the world around them, children use the knowledge and skills. Thus, considering that the language of experiences is a key to learning and development, provision of speech and language support and similarly support for hearing impairment contributed to the improvement their language skills in collaboration with teachers and parents.

The results of this study confirm similar international studies, where thorough cooperation of different participants in the process of providing support to children with special needs, holistic services, teamwork and respect for the principle of individualization leads to improvement of academic knowledge as well as social skills of these children with their different abilities. Frymier and Gansneder (1989) and Lombardi and colleagues (1991) have pointed out that the entire system of support that are needed for children with disabilities are, in fact, very similar to those for children without difficulties. Cooperation between regular classroom teachers and educators-rehabilitators, speech and language pathologists and social pedagogues is completely necessary and it is of crucial importance for the success of this process. In order to create an inclusive school, all experts or special needs educators need to change their mentality towards of education, including changes in traditional paradigms of teaching and learning, support for teachers and other professionals and the very practice of training specialists.

## Conclusion<sup>34</sup>

In this study, significant emphasis is placed on how to include children with special needs in the social life of the class to ensure active learning. The process of teaching and learning is organized in a way that respect pupils' diversities as cultural background, experiences, learning strategies, speed and rhythm of learning, interests and needs. Teachers in cooperation with a professional multi-disciplinary team as a starting point in teaching focused the attention on the child instead of the regular curriculum. During the process of innovation the whole team had constantly in mind that one of the most important things that is often forgotten is that the default contents of general curricula may have very little or no connection with what is happening in the lives of children or in the world surrounding them, including what causes barriers to learning and participation. Precisely for this reason we changed the attention towards the child. In this research and innovation project a) a team approach was developed, b) a new approach to education of pupils with special educational needs was introduced, c) individualization in the work and the development of individual educational programs was applied, d) and planning, practicing and evaluation of pupils as well as program results are characterized by more coordinated and collaborative ways of functioning of all participants in this process of teaching, learning and development within the regular classroom and school.

This process is actually a holistic approach, "*connective pedagogy*" (Corbett, 2001), supported by meaningful programs, aimed to meet capacity, needs and personal interests of the child. This model of providing educational and rehabilitation support to children with special needs in relation to the theories developed by Vygotsky and Brunner, can be considered as an important component in a) development of strategies and techniques of identifying and removing psychosocial, legal and institutional barriers that exist within regular curriculum (too demanding facilities) as well as lack of readiness of teachers in applying teaching methods that are relevant for children with special needs, and

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34 Many researchers have participated in this action research project. In addition to the authors of the three articles (2013; 2014 and current 2015), the following researchers and professional special needs educators are project partners: Dr. Scient Fata Ibralić, Dr. Scient Mirela Duranović, Dr. Scient Husnija Hasanbegović, Dr. Scient Behija Čišić, Sanela Imamović, special educator, Dr. Scient Dževdet Sarajlić and Dr. Scient Lejla Junuzović-Žunić, who has translated the articles to English. The school, its administration and teachers together with parents of pupils with special educational needs and, last but not least, all the pupils in the "case-classes" have all participated in this project.

b) development of inclusive practices through collaboration between special needs educators, regular teachers and school administration as well as parents and the pupils.

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# Teaching Assistance and Support for Inclusion

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## Introduction

### Educational inclusion and research on the role of teaching assistants

Although the Universal Declaration of Human Rights (1948) stipulates that education is a basic right for all, access to education is still a major problem facing persons with disabilities and children with difficulties. In the past 20 years, inclusion has become the key policy in the development of “Education for All” (UNESCO, 2002), and educational inclusion is the basic strategy in fighting marginalization and segregation of vulnerable groups such as children with difficulties.

Although different concepts of inclusion still exist, recently there has been a move towards broadening the notion of educational inclusion to encompass much more than just education of children with difficulties, and discussions are focusing on what makes a school inclusive (Farrell & Ainscow, 2002). An inclusive school is a school where the teaching and learning, achievements, attitudes and well-being of every young person matter, which is reflected in the school ethos and its willingness to offer new opportunities to students who may not have had them.

During this difficult process of creating an inclusive school, many countries, including Croatia, have started developing new educational strategies and plans, and making legislation changes. Various support systems aimed at improving access to schools have been developed, and a lot of research worldwide examines effective methods of inclusion.

The teaching assistant program is one such support system, which has been available in many countries for some twenty years. Given that an increasing number of children with difficulties are being included into regular schools, the number of teaching assistants is also growing significantly. For instance, from 1997 to 2003, the number of teaching assistants in schools in the United Kingdom increased by 99 percent, reaching a number of one hundred thousand assistants (Blatchford et al., 2007; Karn, Cremin & Thomas, 2005).

Although the teaching assistant's role is recognized as crucial, some authors (Blatchford et al., 2007; Giangreco et al. 2001, cited in EPPI, 2003) point out that there are few international studies dealing with the impact of the teaching assistant on increasing educational inclusion. Many aspects of the teaching assistant's influence and effectiveness still remain unknown, and some authors (Mortimore et al., 1992; Schlapp et al., 2001) caution that the distinction between the role of the assistant and the teacher is blurred. Most studies examined teachers' opinions, and showed that teachers generally express a positive attitude towards teaching assistants, because of improved student attention and increased teaching effectiveness (Blatchford et al., 2001). However, not all studies confirm positive educational effects in classes with teaching assistants (Finn et al., 2000).

The EPPI review (2003) analysed more than one hundred studies and showed that positive perceptions that the teachers and students may have about teaching assistants can directly affect the school's inclusiveness and the participation of children with difficulties (French & Chopra, 1999). Both the educational and behavioural aspect of teaching assistants' work is significant. Parents find that social interaction was a more important part of teaching assistants' role than academic achievement. Results of a study relying on class observation and perception scales confirm that teachers value the work of teaching assistants (Rose, 2000).

Thus, teaching assistants may be considered effective mediators between different groups and individuals in the school community. Teaching assistants who are respected and well-integrated members of the school educational team have a stronger positive impact on the inclusion of children with difficulties. Teaching assistants working with a group of children are more willingly accepted than assistants working with a single child. Teaching assistants, who are not well integrated members of the school team, can be seen as contributing to the stigmatization of the students they support. Individual support of a single student may further isolate this student from the class, and reduce the teacher's activities regarding this student (EPPI, 2003).

The teaching assistant's impact on overall class achievement is small, the findings are inconsistent, and no connections are found with the teaching assistant's support or student characteristics. However, qualitative evidence shows that there is a positive impact of the teaching assistant on the achievements of other students.

Teaching assistants play an important role as mediators in many contexts – between students, teachers, other experts, parents and different cultures. Knowledge of students' behaviours, languages, interests and cultures can have a positive impact on students' participation and learning (EPPI, 2003).

With regard to the effects of particular aspects of teaching assistants' behaviour, the results show that assistants' continuous help in completing tasks, assignments, etc. can have positive short-term effects, e.g. successful task completion. However, longer-term aspects of such behaviour create a dependent student. Furthermore, when teachers are less engaged in working with target students, this causes negative effects in terms of student participation and results in the isolation of both the student and their teaching assistant (EPPI, 2003).

The practice in many countries and research results indicate that the role of the teaching assistant is to provide support to:

- the target student(s) (at least one student or a group of students), thus ensuring students' participation in the social and academic activities of the school, promoting the highest possible level of student independence and helping students to attain the same academic standards as their peers;
- the teacher, by monitoring students and reporting on their progress, implementing special programs in collaboration with the other members of the team, and assisting students with their personal needs, e.g. toileting needs;
- the curriculum, by ensuring curriculum accessibility depending on students' achievement levels; the school, by taking part in school activities (meetings, trips...) (Halliwell, 2003).

Croatia followed these international trends and made provisions in its national educational plans, strategies and legislation for the teaching assistant. Their number is on the increase, and there are several hundred teaching assistants in Croatian schools, all of them still funded by non-governmental projects and local educational boards.

At the same time, Croatia has also seen its first studies dealing with teaching assistants and their impact. Teachers expressed a positive attitude towards teaching assistants' activities (Stančić & Sekušak-Galešev, 2008). A study which

qualitatively analysed the impact of the teaching assistant on a target student with ADHD based on observation data showed significant improvement in the target student's behaviour (Igrić et al., 2008).

Further development of this inclusion support system in Croatia (which has been professionalized abroad) requires looking into the ways of organizing the process in Croatia, determining exactly what the assistant's role will be, and investigating which methods will be effective in achieving an inclusive school.

## **Children with attention deficit/hyperactivity disorder in school**

In Croatia, most experiences with teaching assistant support involve children with ADHD. In this section, we will discuss some of the findings related to the effective inclusion of students with ADHD in a school environment.

Attention deficit/hyperactivity disorder is a developmental disorder with pronounced, developmentally inappropriate symptoms of inattention, hyperactivity-impulsiveness, which has a clinically significant negative impact on social, school or work functioning (Barkley, 1990).

Because of difficulties in keeping their attention, which is manifested in a lack of persistence in performing longer uninteresting tasks, making mistakes, difficulties in organization, planning etc., students with ADHD have difficulties with traditional classroom instruction. Symptoms of hyperactivity, such as constant squirming, leaving their seat and walking around the class, are often ascribed to students being badly behaved and spoilt. If there are pronounced symptoms of impulsiveness, such as interrupting conversations, having trouble with waiting for something they want and a low tolerance for frustration, these behaviours lead to rejection by their peers and teachers' aversion to them. It is generally difficult for teachers to understand children with ADHD (DuPaul & Stoner, 2003, cited in Sekušak-Galešev, 2008). They find it difficult to grasp the incongruity between high cognitive abilities and the inability to meet the so-called simple school tasks, such as copying from the board, sitting still in their seat and following other school rules. They are perceived as lazy and "ill-behaved", and are thought to disrupt class work. Thus, children with ADHD are more exposed to school failure, social isolation and antisocial behaviour than other children (Biederman, Faraone & Milberger, 1996). Research has shown that successful classroom intervention providing cues to remain on

task and prompts desirable behaviour reduces ADHD symptoms and leads to better school success (Du Paul & Eckert, 1997). In accordance with the described symptoms of inattention, hyperactivity and impulsiveness, strategies and support techniques are developed to be used by teaching assistants, primarily based on the behavioural approach. Given the child's distractible attention, support is given to keep him/her on task, by repeating instructions, removing distracting stimuli, pointing to mistakes, breaking down tasks into smaller parts, etc. Given the child's increased restlessness and the need to move around, acceptable classroom behaviour must be agreed upon with the teacher, e.g. going for a short walk, wiping the board, handing out papers, drawing while in the seat, squirming in the seat, fidgeting, etc. Similarly, undesirable behaviours disrupting the other students should also be identified. Desirable behaviours are rewarded by praise and unacceptable behaviours ignored. The aim is to eliminate undesirable behaviours, i.e. to interrupt them when they appear. Children with ADHD frequently exhibit a low tolerance for frustration, so it is sometimes more effective to ignore inappropriate behaviours than insist on changing them.

## Aim and research questions

In order to ensure the student's full inclusion in a regular classroom, it is necessary to provide support, which will keep in mind the student's needs, without "stigmatizing" him/her. Therefore, the teaching assistant's interaction with other children and cooperation with the teacher are crucial. This study, which is a part of an international project<sup>35</sup>, explores support to a student with ADHD, because most requests for teaching assistant support in Croatia concern students with this disorder. The aim of this study is to evaluate the role of the teaching assistant in a support model for educational inclusion of a student with ADHD. The study addresses the following research questions:

- How does the teaching assistant support the class?
- How are the assistant's interventions linked with the target student's behaviour?

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35 "Development towards the Inclusive School: Practices – Research – Capacity Building", which is a project with participation from 7 universities (Skopje, Belgrade, Ljubljana, Tuzla, Sarajevo, Zagreb and Oslo). (Project leader: B. H. Johnsen).

## Methodology

**Participants.** A second-grade class with 25 students was selected in a primary school in Zagreb willing to participate in the study. The class had three students with difficulties, all of whom were certified as eligible for an individualized education program. After one month's classroom observation, one of them, D, was selected for the study. The selection criterion was the teacher's opinion that D presented the biggest challenge and needed most support, for his sake and the class. D is nine years old. He finished first grade with excellent grades. He has well-developed abstract thinking and logical reasoning skills, is above average at mathematics and creative in fine arts. He demands the teacher's attention, may give up, showing anger and cursing, has conflicts with the other students and demands a leading role in group work. These difficulties consequently are affecting his academic progress, social and emotional development.<sup>36</sup>

The teaching assistant is a female student enrolled in the final year of a teaching qualification program. This is her first time involved in supporting students in a classroom. She works four hours every day.

The teacher volunteered to be involved in the program, and this was the first time that she worked with a teaching assistant.

**Procedure.** This study is part of a program<sup>37</sup> to evaluate the efficiency of support for educational inclusion by means of a mobile team of experts and a teaching assistant.

In the context of this program, support for educational inclusion refers to:

- a) The teaching assistant's support to the student with difficulties (ADHD) and to the other students in cooperation with the teacher.
- b) The Mobile Team of Expert's (MTE) supporting the teacher and teaching assistant. The MTE consists of educational and rehabilitation specialists – one experienced in developing individualized education plans, and one experienced in working with children with ADHD. The MTE consults the teacher and the teaching assistant twice a week for two periods during the first semester and once a week for two periods in the second semester.
- c) Supervision of the teaching assistant by the MTE members, held once a month throughout the school year.<sup>38</sup>

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<sup>36</sup> Described in Igrić et al., 2014.

<sup>37</sup> The program, including the assistant's work, was funded through projects of the IDEM association (project leader: Lj. Igrić), funded by the National Foundation for the Development of Civil Society and the United Nations Development Programs.

<sup>38</sup> Described in Igrić et al., 2014.

The MTE and the members of the international research project evaluating the program used classroom observation to plan what type of counselling the teacher and the teaching assistant needed. Student's behaviour in the class and the teaching assistant's activities were observed over a period of five months.

A focus group interview with the students and an interview with the teacher and the mother were conducted immediately after the observation period, and two school years later with the mother, the teacher and the target student.

**Data collection procedures.** Two cameras were used to record the activity of the teaching assistant, one videotaping the class, and one videotaping the assistant. At the same time, three observers observed D's behaviour in class and the classroom atmosphere.<sup>39</sup>

**Data processing methods.** Since this study was conducted in a real social context, qualitative methodology was used for the analysis and interpretation of data. Summarizing and structuring were conducted according to the principles and procedures described in Strauss and Corbin (1991) and Mason (1996).<sup>40</sup> The analysis was performed using the NVivo 8 software, which was used as a means of handling the data and a database, for the mass of data on the research problem.

## Analysis of the assistant's activities from the video recordings

In order to provide the answer to the first research question, which concerns the teaching assistant's support for class work, the assistant's interventions towards D and other students as well as her communication with the teacher were analysed.

One hundred nineteen concepts were summarized into twenty-nine categories of activities that consist of the following categories:

- Ten categories of activities towards D: communication, ignoring, interrupting behaviour, intervention attempts, lack of intervention, providing cues for D to remain on task, prompting desirable behaviour, helping D do his work, watching D's movements, writing in her notebook;

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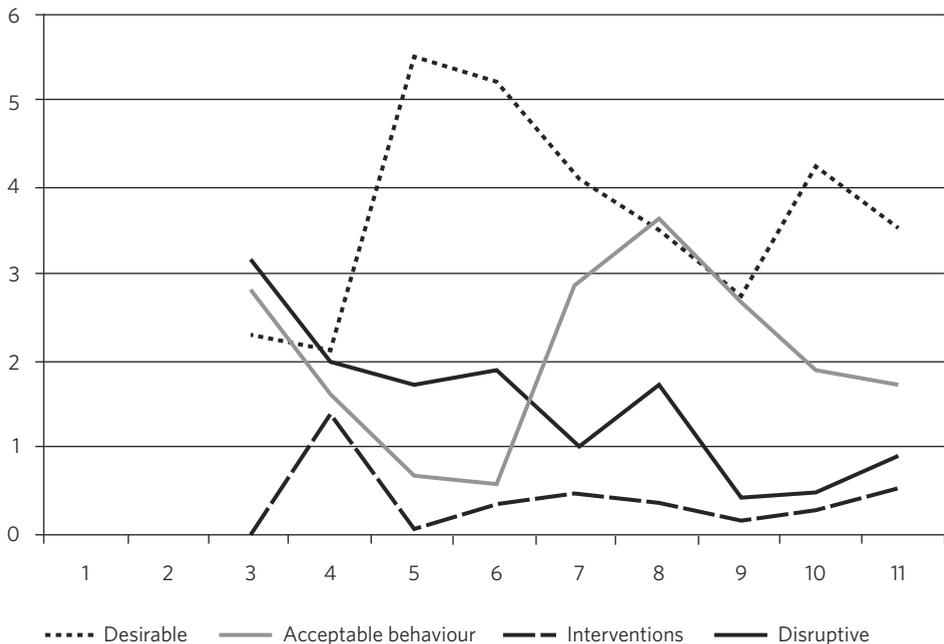
39 Described in Igrić et al., 2014.

40 Described in Igrić et al., 2014.

- Three categories of activities towards the other students: intervention, communication and helping the other students do their tasks; in this study we only analyse the category of helping the other students, which was the most frequent one;
- Three categories of activities towards the teacher: looking at the teacher, reacting after the teacher's intervention, oral communication with the teacher; in this study we analyse oral communication, which was the most frequent category.

The frequencies of these categories were determined during each observation, and their trend from the first to the eleventh observation was monitored.

The following graphs represent observation points 1 to 11 and the most frequent categories during each observation point. They were triangulated with the histogram of frequency of the student's behaviour in order to detect any trends concerning the connection between the assistant's activities and the student's behaviour (Figure 1). Additionally, the following data were analysed: classroom atmosphere, the MTE counselling topics, teaching methods, lesson structure, and data from interview with the mother, teacher and the student focus group.



**Figure 1.** Frequencies of D's behaviours

## Categories of the assistant's activities

The analysis of video tapes and summarizing were used to determine the basic categories of the assistant's activities. We present here seven most frequent categories of activities towards D, the most frequent category of activity towards the other students and the most frequent category of activity towards the teacher. The data are presented for all eleven observation points.

**Activities towards D: Lack of intervention.** This category is defined as a lack of a necessary intervention when the student's behaviour requires it or not providing assistance to the other students when D was focused on his task for a longer period of time.

During the initial time points, lack of intervention and failed intervention attempts appeared more frequently. This was to be expected because at the time mutual trust between the assistant and D had not yet developed. Moreover, because of her limited experience, the teaching assistant was not yet willing to help the other students. At time point eight, lack of intervention reappeared, which may be ascribed to the classroom context (the way in which the students were seated during the class), which may have prevented the assistant's interventions.

**Activities towards D: Prompting desirable behaviour.** This intervention consists of two subcategories: successful and unsuccessful prompting. Successful prompting mostly appears during the third and fourth month of observation, and unsuccessful prompting prevails during the first observation point, when a good relationship with the boy has not yet been established.

**Activities towards D: Intervention attempts.** This category includes unsuccessful interventions. The assistant's intervention did not stop D's undesirable behaviour or did not result in starting the expected desirable behaviour.

This category appeared most frequently after the winter break, when the assistant patiently intervened in various ways, including providing substitute activities, such as letting D draw.

**Activities towards D: Communication between the assistant and D.** This intervention includes oral and nonverbal communication, and a combination of both channels. Oral communication refers to a conversation between the target student and the assistant, when both are interested in communicating. Nonverbal communication refers to many different activities, such as touching, eye contact, nodding etc. used in communication between the assistant and the target student.

This category appeared most frequently during the third and fourth month of observation, when D developed trust towards the assistant, resulting in better cooperation. D would frequently initiate communication himself. However, at the time, he was not really willing to work on classroom tasks.

**Activities towards D: Ignoring behaviour.** This category includes the assistant's activities that, based on cognitive behavioural theory, lead to a discontinuation of undesirable behaviour. In addition, some behaviours were agreed upon with the teacher as tolerable because they would not disrupt the class. In these situations the assistant would remain with the student, ignoring him, or would leave to help the other students. Alternative activities are introduced to prevent unacceptable behaviour and to induce acceptable behaviour and MTE advised assistant to provide that activities.

Ignoring was most frequent during the third and fourth month, i.e. after the first half of the observation period. Before this time, the assistant had not learned to use this procedure, although it had been recommended. The assistant had to see for herself that the procedure was effective, in other words, she had to realize that the student could learn that some behaviours are not rewarded (with the assistant's attention). Certain behaviours were also introduced (such as drawing), and were used to replace unacceptable behaviours. Such behaviours, it was agreed in the classroom, would be tolerated by all. At the end of the observation period, there was again less ignoring, i.e. there were fewer behaviours that required to be ignored. In order for this intervention to be effective, the procedure needs to be agreed upon with the teacher, because it requires a cooperative effort.

**Activities towards D: Interrupting behaviour.** This category refers to positive effects of the assistant's actions and a successful interruption of undesirable behaviour.

Most interruptions occurred in the third and fourth month of the observation period, i.e. when the assistant learned effective intervention techniques and developed a trusting relationship with the student. There were fewer interruptions later because the number of unacceptable and disruptive behaviours decreased.

**Activities towards D: Providing cues to remain on task.** This category includes various procedures aimed at motivating the student to keep on task, e.g. by organizing the student's desk, collecting material or the assistant providing a model behaviour to imitate.

This category appears most pronouncedly in the seventh observation period, when the assistant was using different ways to try to stimulate D's interest in class work after a school break. It was possible for the assistant to use this procedure

only after she felt more confident in selecting one of the suggested approaches, and when she allowed herself the creativity and spontaneity in her interventions.

**Activities towards the other students:** *Helping the other students.* This category refers to all the assistant's activities directed at working with the other students, both by going around the class and checking on their work or sitting next to a student and working with him/her. This stimulates good classroom dynamics and prevents the isolation of the student with difficulties, which may happen if the assistant focuses only on the student with difficulties.

This intervention varies from one observation to the other. At first, such activities may be related to ignoring D, when the assistant's intention was to show to D that she was not interested in one of his undesirable behaviours, in order to stop it. Later, when undesirable behaviours were reduced, and the assistant gained the confidence to be more active in the classroom, she worked with the other students primarily to help them. In addition, when D was having "a bad day", she would go to the other students in order to be useful in the classroom, and to arouse D's interest in class work. Working with the other students contributed to the development of an inclusive classroom, where nobody is stigmatized.

**Activities towards the teacher:** *Oral communication with the teacher.* This category refers to the assistant's communication with the teacher about D's class work, initiated by the teacher, by the assistant or as supplement to D's communication with the teacher (additional explanation of D's work).

Communication with the teacher, especially oral communication, was not particularly pronounced during observation, appearing largely in the second part of the observation period. On the one hand, this is due to the teacher's uncertainty on how to treat the assistant, on the other, the assistant's attempts to deal with the situations herself, because she thought that controlling D's behaviour was solely her responsibility. Despite urged by the MTE to cooperate more with one another, oral communication was not evident.

## **Analysis of the teaching assistant's activities by observation points**

This section presents the analysis of trends of the assistant's procedures from the beginning to the end of the five-month observation period. The frequencies of each category were determined during every observation, and their trend from the first to the eleventh observation was monitored.

<i>First observation, November 13</i>	
Context	Assistant's Interventions
<p><b>The teacher</b> reads a text, and the students are supposed to answer questions about it. D is in a bad mood and angry.</p> <p><b>The student</b> starts exhibiting some behaviours, refusing to do his assignment, and disrupts the other students.</p> <p><b>The assistant</b> spends the first part of the period with D, and the rest with the other students.</p>	<ul style="list-style-type: none"> <li>• oral and nonverbal communication between the assistant and D</li> <li>• interventions for stopping undesirable behaviours</li> <li>• managing to keep the student on task</li> <li>• sitting next to the student</li> <li>• giving support to the other students and ignoring D's behaviour</li> </ul>
<i>Second observation, November 20</i>	
Context	Assistant's Interventions
<p><b>The assistant's interventions</b> are successful.</p> <p><b>The assistant</b> successfully interrupts.</p> <p><b>The student</b> was in a good mood from the very beginning, willing to cooperate, and the assistant's interventions were therefore successful.</p>	<ul style="list-style-type: none"> <li>• D's good mood as one of the preconditions for the assistant's successful interventions</li> <li>• sitting together with student D</li> <li>• communication between assistant and D. is longer and successful</li> <li>• using nonverbal communication for successful interventions</li> <li>• student starts remaining on task without the assistant's intervention</li> <li>• assistant works with the other students while the teacher is working with D</li> </ul>
<i>Third observation, November 27</i>	
Context	Assistant's Interventions
<p>Because of the <b>assistant's unpleasant experiences</b> from the day before, which were a result of D's impulsive behaviour towards her, she avoids any interventions directed at the target student.</p> <p><b>The student</b> had a conflict with another student in the class.</p> <p>This observation point was the lowest point during the entire observation period.</p>	<ul style="list-style-type: none"> <li>• ignoring D's undesirable behaviour during the entire class, sitting next to another student</li> <li>• assistant does not react on teacher's requests for intervention</li> <li>• sitting with students who also exhibited undesirable behaviours</li> <li>• talking and helping the students next to her</li> </ul>
<i>Fourth observation, December 4</i>	
Context	Assistant's Interventions
<p><b>The assistant</b> was trying to follow the mobile team's instructions from the previous counselling session to ignore the target student's undesirable behaviour.</p> <p><b>The target student's behaviour</b> changed and may also be ascribed to counselling the teacher about how to cooperate with the assistant.</p>	<ul style="list-style-type: none"> <li>• ignoring the student when he sat under the desk</li> <li>• allows D to be under the desk for a period of time, communicating with him during this period</li> <li>• assistant does not help the other students</li> </ul>

<i>Fifth observation, December 11</i>	
Context	Assistant's Interventions
<p><b>The target student</b> exhibited the greatest number of desirable behaviours. Acceptable behaviour is on the increase, thanks to the <b>assistant's</b> successful, frequently nonverbal <b>interventions</b>.</p>	<ul style="list-style-type: none"> <li>• assistant helps D. with his tasks, talks to him, cooperates with him</li> <li>• assistant asks the teacher for crayons and supports D. when he is unsure whether his answer is correct</li> <li>• interrupting the student when he answers a question without being called on</li> <li>• communication with the teacher</li> </ul>
<i>Sixth observation, December 18</i>	
Context	Assistant's Interventions
<p><b>The student's desirable behaviour</b> is very pronounced, and acceptable behaviour is not present to a great extent.</p> <p><b>The assistant</b> was praised for her ignoring interventions, and was encouraged to be freer in deciding about her interventions, because she was well acquainted with the target student by this time.</p> <p><b>The teacher</b> was advised to inform the assistant about class activities.</p>	<ul style="list-style-type: none"> <li>• assistant is sitting next to the target student during this period, watching what he is doing</li> <li>• assistant remains D. on task for most of the time, communicates with him when necessary</li> <li>• assistant does not work with the other students</li> <li>• assistant does communicate with the teacher</li> </ul>
<i>Seventh observation, January 22</i>	
Context	Assistant's Interventions
<p>This was one of the first classes after the Christmas break.</p> <p><b>The student</b> is more restless than usual, but disruptive behaviour is less pronounced than at previous time points.</p> <p><b>The assistant</b> adapted her activities to D's behaviour and was advised to suggest drawing as an acceptable substitute activity.</p>	<ul style="list-style-type: none"> <li>• when D leaves his seat, the assistant immediately goes to help another student (a technique of ignoring)</li> <li>• drawing significantly increased the category of acceptable behaviour</li> <li>• assistant and the teacher communicate about D's tasks</li> <li>• ignoring when D plays with a plane or sits under the desk and communication through whispering</li> </ul>
<i>Eight observation, January 29</i>	
Context	Assistant's Interventions
<p>Immediately before the class there was a <b>conflict between students</b>. At the beginning of the class <b>D sits</b> in the first bench, and soon leaves, goes to the back of the class and sits next to a boy with behavioural difficulties, his disruptive behaviour has increased considerably and acceptable behaviour prevails.</p> <p><b>The teacher</b> reads a lengthy text, which cannot attract the children's attention.</p>	<ul style="list-style-type: none"> <li>• the assistant moves around the class the most in order to intervene, communicating with the other students and helping them</li> <li>• the assistant just watches D's movements and was trying to establish contact with D, but was unsuccessful, so she sits in one of the seats behind him</li> </ul>

<i>Ninth observation, February 5</i>	
Context	Assistant's Interventions
<p><b>The class</b> is preparing for the <b>Carnival</b> and a masquerade ball and they are wearing masks.</p> <p>There is a cheerful atmosphere, and everyone is in a good mood.</p> <p><b>Student's</b> desirable and disruptive <b>behaviours</b> are not very frequent, and acceptable behaviour is one of the most frequent ones.</p>	<ul style="list-style-type: none"> <li>the assistant mostly ignores acceptable and disruptive behaviour and talks with D</li> <li>the assistant manages to stop undesirable behaviours thanks to her interventions</li> <li>the assistant found this situation difficult to cope with, and did not interact with the other students very much because a lack of structure agitates D</li> </ul>
<i>Tenth observation, February 12</i>	
Context	Assistant's Interventions
<p><b>Student's</b> disruptive and unacceptable <b>behaviour</b> are on the decrease, and there is more desirable behaviour.</p> <p>One part of the class is organized as <b>group work</b>. D is trying to dominate the group and be the leader.</p>	<ul style="list-style-type: none"> <li>the assistant is active in helping D</li> <li>the assistant uses ignoring procedures up to a certain point, and in some critical situations and is more forceful in making demands</li> <li>the assistant sometimes help other students, and the teacher comes to work with D's group.</li> <li>the assistant's communicate with the teacher and they cooperate</li> </ul>
<i>Eleventh observation, March 18</i>	
Context	Assistant's Interventions
<p><b>The teacher</b> had D do an assignment on the board in front of the class, and the assistant was helping one of the students sitting in the back bench.</p> <p>When D completed his task, he and the assistant sat together, and communicated. Student left his seat from time to time and then returned.</p>	<ul style="list-style-type: none"> <li>the assistant kept prompting student to remain on his task</li> <li>the assistant is considerably more confident in her activities towards D and the other students</li> <li>the assistant matched her activities to the student's mood, not insisting on stopping some behaviour, but used ignoring techniques</li> <li>the assistant was suggested by MTE to avoid forcing some activity and when the student "declined twice" to prompt him to do something else</li> </ul>

## Interpreting the assistant's interventions

The changes in the assistant's interventions during the 11 observation time points, their comparison with the student's behaviour and triangulation with all the remaining sources leads to the following conclusions:

At the beginning, the assistant was very insecure, which was reflected in unsuccessful attempts to intervene. However, as she was getting to know the student and as she was given advice by the MTE, she became more resolute and made her demands to D more clearly. Later, the relationship between D and the

assistant became more trusting. The assistant started using substitute activities, talking to D and ignoring some of his behaviours.

During the first two months, the assistant ignored D's behaviour by leaving to help other students, but did not manage to be as involved in their work as later on (in the third and fourth month). The assistant's activities were influenced by D's sporadic aggressive behaviour towards her, which occurred outside the observation period. Initially, when this happened she reacted by becoming passive, and later on she would turn to working with the other students. The assistant did not cope very well with D's aggression (which is corroborated by her own statement), and this might have had an impact on the appearance of this impulsive behaviour.

During observation points when the classroom atmosphere was good, D's desirable behaviour was on the increase; at first in such cases, the assistant helped D do his class work, and later on, she helped the other students. When there were conflicts between students immediately before class or during class (even if D was not involved), this significantly influenced D's mood. Such situations required great skill from the assistant to adapt to them. Group work has turned out to be a desirable activity, both in relation to the student's behaviour and to the assistant's actions. Supporting the assistant by praising her and encouraging her to use particular interventions made her stronger, i.e. she was more confident in using certain procedures, which the students recognized and reacted to her better.

Information obtained from the parents also helped the assistant in eliminating undesirable behaviour and the assistant increased talking with D, explaining certain situations to him. The mother knows her child very well, she worked with the teacher and regularly exchanged information with the assistant, and her positive attitude towards the changes during the program was important.

By supporting the other students, the assistant contributed to a better inclusion of the target student. In class, the assistant had to cope with very demanding requirements. Consideration her lack of experience and the fact that this was the first time the teacher worked with a teaching assistant, understandably the two of them could not focus on improving their mutual cooperation.

Our results and their interpretation suggest that the answers to the first and second research questions, which are summarize in the tables below.

### 1. How does the teaching assistant support the class?

Results and their interpretation suggest that the answer to the first research question may be the following:

- The assistant most frequently employed seven intervention categories towards the target student (communication, ignoring, interrupting behaviour, intervention attempts, lack of intervention, providing cues to remain on task, prompting desirable behaviour)
- The set of intervention procedures changed during the program, because trust developed between the assistant and the target student
- In the second part of the observation period the assistant more frequently ignored undesirable behaviour, was more successful at stopping it and at communicating with the student
- In the last part of the observation period, the assistant was more successful in prompting desirable behaviour and keeping him on task
- Helping was the most frequent intervention category towards the other students (going around the class, to helping a single student, to managing group work together with the teacher)
- Regarding the activities towards the teacher, oral communication prevailed, but not until the middle period of the experimental program and also nonverbal communication with each other regarding interventions

### 2. How are the assistant's interventions linked with the target student's behaviour?

Results and their interpretation suggest that the answer to the second research question may be the following:

- There is a close two-way link between the student's behaviours and the assistant's interventions
- The student's behaviour changes considerably, and the assistant's interventions follow the same pattern
- When the student is willing to work, is in a good mood and does class work, the assistant occasionally helps the other students
- The entire context influences the student's mood, including a less structured lesson or a conflict between students before or during class
- When the assistant developed a more flexible approach to D, the student, although agitated, exhibited less disruptive behaviour.
- In the last part of the experimental program the assistant's interventions were clearer and more structured and she was able to communicate well with D and influence his behaviour

## Critical comments

The results of this research should be taken with caution with reference to other difficulties caused by specific disabilities or environmental obstacles. It should be kept in mind that these data are based on a single case concerning a student with ADHD, who has good support from his family, and there was close cooperation between teacher and parents.

The results of the research might have been influenced by multiple factors related to methodology such as:

- The researchers were also classroom observers. One of them occasionally participated in counselling the teacher and the assistant, which could have influenced the objectivity of the analysis and the interpretation. Attempts were made to avoid this by always involving two researchers in jointly transcribing and summarizing recordings, one of whom never participated in the counselling or observation.
- Given that the aim of this study was to test the effectiveness of involving a teaching assistant in a classroom in Croatia, the researchers had certain expectations of the assistant, which could lead to being very critical in assessing her work. Therefore, the assistant was monitored and supported by the members of the MTE who were not involved in this study.
- This was the first study in Croatia looking into the involvement of a teaching assistant in an inclusive classroom, and the practical experience of all those concerned was limited. Therefore, the MTE focused largely on the target student and his behaviour challenges, giving insufficient attention to the assistant's involvement with the other students, which certainly was reflected in her activities.
- The development of the relationship between the assistant and D could have been influenced by their socialization outside the school. This was not part of the program: the assistant and the mother informed the research team about D socializing with the teaching assistant at the end of the observation period. The development of the boy's trust towards the assistant was an important factor in the program. However, it also caused the assistant to assume a different role; that of a "friend". The "friend" role could have had an adverse effect on the assistant's actions towards D, and may have encouraged D's unpleasant impulsive aggression towards the assistant. In the long term, this was an inefficient way to establish a relationship, which was evident later, when D, after the first teaching assistant departure, could not accept a new assistant.

## Conclusion

The aim of this paper was to address certain issues related to conducting support programs in an inclusive classroom. The study analysed the procedures of a teaching assistant working in a class attended by the target student D, whose difficulties are a result of ADHD. The program involved a mobile team of experts (MTE), who provided continual support to the assistant in her choice of methods and procedures.

The assistant's flexibility in the choice of methods proved very important in working with the target student with ADHD. In achieving flexibility, two things proved crucial: providing the assistant with continual expert support and the assistant's personality traits, which allowed her to form a complex relationship with a student who has a low tolerance for frustration.

In order for the teaching assistant not to contribute the isolation and additional stigmatization of the student with special needs, the assistant's classroom role needs to be taken more broadly than just helping a student with difficulties – it needs to be seen as helping the teacher. Moreover, the assistant must be willing to learn through counselling, to cooperate with the teacher, and, last but not least, and to cooperate with the parents.

It should be pointed out that group work proved very effective with regard to the target student's behaviour, the assistant's involvement with the rest of the class and the cooperation with the teacher. Frontal instruction, which is still dominant in Croatian schools, makes it much more difficult to establish a dynamic and inclusive classroom atmosphere that group work provides. It will be difficult to develop a "school for all" without improving teaching methods in the classroom. Teachers do not entirely understand their role cooperating with teaching assistants; they are uncertain about what is expected of them and unsure whether the assistant's role is to focus on the single student or to be the teacher's helper.

The adoption of the "school for all" approach allows the teaching assistant to play an integral role in supporting an inclusive school, because the assistant can help the teacher to get to know his/her students better, matching curriculum requirements to their abilities and interests.

The complexity of involving a teaching assistant in the classroom, as presented here, may be fully addressed once all regulations controlling this activity are in place. Moreover, teachers need access to lifelong education working in an inclusive school, and mobile teams of experts may play a major role in making this happen.

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# A Longitudinal Classroom Study of Inclusive Practices

*The Norwegian Contribution  
to International Comparative Classroom Studies*

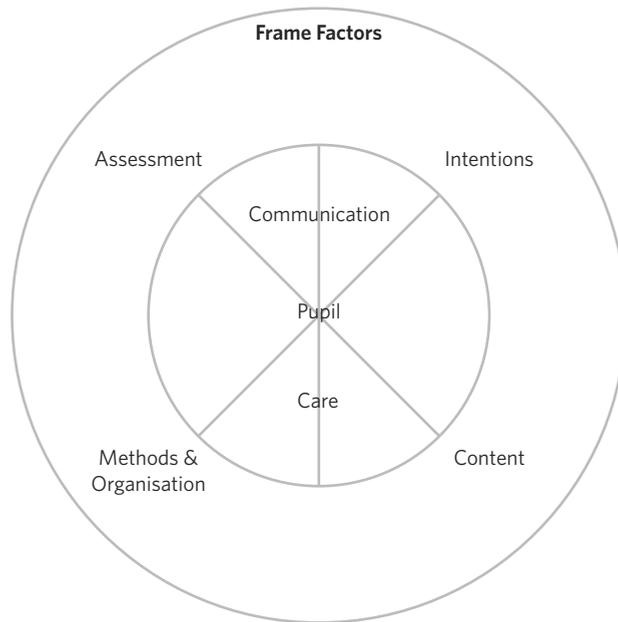
Berit H. Johnsen

## Introduction

How does school teach in accordance with pupils' different levels of mastery and needs for support in the learning process?

What are the recourses, barriers and dilemmas in schools' developmental process towards achieving inclusion?

This article is a summary of selected findings in response to these two research questions. It is the Norwegian contribution to the large cooperative project, *International Classroom Studies of Inclusive Practices – Comparing Teaching-Learning Processes* (WB 04/06), with studies of processes towards developing inclusive schools in six countries in the north western and south eastern parts of Europe (Johnsen, 2013a; Johnsen et al, 2020). The study follows the joint research project's main aspects as one of seven chapters. As the title implies, this is a longitudinal single case study of inclusive practices. The school has been purposefully selected based on the criteria of having a successful classroom teacher and class in a regular elementary school – with its possibilities, dilemmas and challenges (Johnsen, 2013b; 2014d).



**Figure 1.** *The Curriculum Relation Model* revised in Johnsen (2007)

## Theory and methodology adapted from joint research plan

This study is theoretically situated in the intersection between a didactic-curricular and culture-historic approach to teaching, learning and development, as indicated in the joint research plan (Johnsen, 2013a; WB 04/06). From didactic-curricular point of view, the Vygotskyan culture-historic tradition outlines the necessary interplay between former traditional learning theories and theories of teaching, learning and development. Thus, didactic and curricular theories have deep-rooted traditions in detailed discussions of the commonplace aspects of teaching, such as aims and goals, content, methods, classroom organisation and assessment (Gundem & Hopmann, 1998; Johnsen, 2000; Klafki, 1999). The current focus on context stems from cultural-historical and ecological traditions as well as social pedagogy (Bronfenbrenner, 1979; Bronfenbrenner & Morris, 2006; Cole & Gajdamaschko, 2007; Daniels, 2014b; Goodlad, 1979; Ivić, 2014; Johnsen, 2014c; Kristeva, 2008; Vygotsky, 1978). The field of special needs- and inclusive didactics offers an explicit focus on com-

munication and care (Daniels, 2014a; Johnsen, 2014b; 2020a; Noddings, 1992; 2010; Rye, 2005). Thus, the areas from the different research traditions are integrated in a didactic relation approach that may be illustrated by the so-called Curriculum Relation Model.

The didactic relation approach contributes to relating the abovementioned didactic areas and applying them as a set consisting of eight research foci on the teaching – learning – developmental processes on the micro level (Alexander, 2009; Johnsen et al, 2020), paying particular attention to the individual pupil in the classroom community. Methodologically speaking, this is a longitudinal single case study (Holland, Thomson & Henderson, 2006; Stake, 1995; Thomson & McLeod, 2015), taking place from spring 2006 to summer 2010, or until, after seven years of elementary school, pupils move on to a lower secondary school. In Stake's (1995; Simons, 2015) terminology this is an instrumental case study, because there is an implicit assumption that the study is instrumental in generating an understanding beyond the particular case to inclusive practices found in other schools both in Norway and on the international scene. Subsequently, the compilation and comparison of the seven international cases in one joint report represent a further generation and joint discussion of findings (Johnsen et al, 2020). However, generalization based on similar findings is not intended in this research project; rather, it is meant to be instrumental in the sense of contributing to opportunities for further research based on the obtained findings.

The Norwegian single case study applies triangulation or multi-method approach comprised of two main data collection methods supplementing each other; 1) a combination of non-participatory and participatory classroom observations and 2) open interviews with pre-informed themes. The study is implemented through a series of daylong school visits having a combination of four lessons with classroom observations and two hours with open interview or dialogue with the classroom teacher, supplemented with additional dialogues with school leaders and other relevant informants. Typical for qualitative case studies, an ongoing analytical process takes place throughout the study until final compilation. There is a focus on balancing between meaning making, authenticity and trustworthiness of the informants' emic perspectives and the etic perspective of the researcher's theory-driven interpretations and reflections (Brantlinger et. al., 2005; Creswell, 2007; Creswell & Poth, 2018; Gall, Gall & Borg, 2007; Golafshani, 2003; Johnsen et al, 2020; Olive, 2014; Simons, 2015; Stake, 1995).

This summary version of a longitudinal and detailed research project like this classroom study can only offer glimpses of findings. The presentation of findings is structured in accordance with the eight abovementioned main areas or themes presented in the didactic-curricular relation approach (Johnsen, 2013a; 2014b). This is also in accordance with the structure of the joint international comparative report (Johnsen et al, 2020) with one exception. This article starts with a short contextual description in order to give the reader a summary of the background of the case school in advance.

## Context

The site of this study is a rather prototypical elementary school (6–13 years) in a prototypical Norwegian municipality containing a town and maritime, agricultural and forestry areas. It has a total of six elementary and lower secondary schools. The class in question consists of 21 pupils at the start of the study and 27 pupils at its end, by which time the school has merged with a smaller school and moved into a brand new building. Throughout the research period, three classroom teachers have had primary responsibility for this class. They are the main informants in this study together with the class<sup>41</sup>. Being prototypical, the school operates within the frameworks of international human rights, national educational act, curriculum and other political guidelines, as accounted for in Johnsen et al (2020). The municipality is responsible for its own employment and economic operations, albeit in accordance with national law. Moreover, all schools and municipalities have their own local characteristics within these frameworks. Thus, an area's demographics, labour market and employment opportunities as well as social and cultural aspects and mentalities have impact on school-life (Bronfenbrenner, 1979; 2006). In this study, the local school-office have selected a highly regarded case school, -class and classroom teacher on the researcher's request for "a good case", demonstrating good practices (Johnsen, 2014a; Moen, 2004; Travis, 2014). The following sections present excerpts of findings within each of the main didactic-curricular aspects mentioned above.

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41 Contact teachers or classroom teachers, as they were traditionally called, teach almost all subjects during the first years at school, whereas the number of subject teachers use to increase over the years. This class has had subject teachers in physical education, arts and crafts and English. Other staff related to the class are special needs- and other cooperating teachers, assistants and after-school programme staff.

## Knowledge about every individual pupil in the classroom community

According to the curricular relation approach (Johnsen, 2014b), it is necessary to have comprehensive, detailed and relevant knowledge of the single pupil in order to develop individually adapted curricula and educational inclusion. What kind of knowledge about the individual pupils in the classroom community is focused upon; a) what kind of information do the classroom teachers have; b) how do they acquire it; c) whom do they share it with; and d) how does this information help them to practice inclusion?

Concerning what is considered important knowledge, repeated in-depth dialogues with the primary level classroom teacher reveal her detailed knowledge about every single pupil inside and outside school, including their personal context. At school, she prioritizes two main areas, namely a) psychosocial well-being and mastery; and b) academic mastery and abilities. When asked what kind of knowledge is most important, she answers:

I emphasize wellbeing ... that the child thrives...

When it comes to academic mastery levels, she points out that since she has been their teacher for several years already ... “I suppose I know where each of my pupils can perform a bit more”.

How does she acquire this knowledge? She tells about talking with the individual pupil, informal and formal tests, school- and homework, as well as observations of their interaction and activities both in the classroom and outside during breaks. She regularly reviews each pupil’s workbooks in all school subjects. An important systematic source of information is the weekly learning plan – or class & individual curriculum. The pupils have their own “intermission book” where they write about themselves. These books tell her a lot about their interests as well as likes and dislikes. In addition, the teacher also has her own “pupil book”; a kind of logbook for everyday schooling. She reviews these books before every meeting with the pupils’ parents, who also provide important information about their child in addition to their expectations of and concerns about them.

In this typical local Norwegian school, pupils are familiar with their classmates’ other personal qualities beyond academics. This becomes clear through the Howard Gardner- inspired practice using *Multiple Intelligences in the Classroom* (Armstrong, 2. Edition, translated to Norwegian by M. K. Ofstad and published 2003), where the classmates have as homework to select and argue

for each classmate's "number one area of cleverness" or "intelligence". In the end, the majority of pupils are "labelled" according to their highest personal diligence in dancing, football, skiing, chess, etc. – only positive characteristics are presented and discussed, providing the teacher with additional information about her pupils. Observations confirm that these assignments contribute to bringing the class together into an inclusive group in their early school years. However, as the teacher points out, it is a paradox that very few of the typical school subjects are mentioned.

Through her thorough knowledge about every single pupil, the teacher is well aware of the diversity of wellbeing, mastery, interests, dislikes and concerns in her classroom. Consequently, in addition to her own individual adaptation and support, the teacher also cooperates with colleagues, headmaster and school administration as well as external services for the good of her pupils. All three classroom teachers state that the principal and her school administrators are important dialogue partners and supporters, taking co-responsibility in important and at times complex decisions. These are important sources of information and knowledge exchange as well as cooperation.

Is all information relevant? The classroom teachers point out that there may be gossip around pupils and families, and some families may be more vulnerable than others. Consequently, a teacher argues: "One has to sort out what may be relevant from what is not". She adds that sometimes what has seemed unimportant suddenly sheds light on problems a pupil might be experiencing. Thus, the classroom teachers describe their dilemmas and challenges. They also speak about their concerns, for instance about certain pupils' being socially accepted or a pupil receiving consequences for disruptive behaviour. They may worry whether planned teaching procedures will prove successful in finding fruitful ways above or around pupils' learning barriers – or not. Woven into these concerns is their hope of keeping an inclusive class mentality where all pupils have a sense of joint ownership.

The classroom teachers' awareness may be characterized as comprehensive knowledge of the whole child in the community of the class. Thus, their stance is similar to that of the educational philosopher, Nel Noddings' (1992; 2010), who argues that pupils are not only pupils, but also comprehensive and multifaceted human beings. Noddings' challenge to care in school is practiced by the classroom teachers. Similarly, the first classroom teacher's knowledge about how her pupils "... can perform a bit better ..." relates to Lev Vygotsky's famous account of his concept zone of proximal, or close development, which says:

... the distance between the child's actual developmental level as determined by independent problem solving and the higher level of potential development as determined through problem solving under adult guidance or in collaboration with more capable peers (1978: 86).

Three aspects of Vygotsky's discussion of this concept are related to the classroom teacher's information and observed practice; a) that in addition to knowing pupils' independent mastery levels or "yesterday's knowledge", it is crucial to be aware of their proximal, or nearest potential mastery level, or "tomorrow's knowledge" or the ability to perform a bit better; b) that pupils have different levels of mastery and potential development; and c) that teachers have an important responsibility for pupils' learning and development. Is the awareness of Noddings' challenge to care in school or Vygotsky's arguments concerning the zone of proximal development (ZPD) acquired in the teacher's education? This question is not posed during the many interviews. However, it may be likely that Vygotsky's ZPD concept has been introduced in the further education courses that the first teacher has taken throughout her career, since his theories are considered classic, whereas Nel Noddings' arguments have not been as well known. It seems that the teacher's arguments for caring about and supporting pupils' attempts to perform steadily a bit better are based on her own practice.

Observations and interviews with the second classroom teacher indicate that main aspects of the first classroom teacher's knowledge about individual pupils have been transferred to him. Main reasons for this assumption are a) the professional collaborative attitude of sharing among the case school's teaching staff b) their joint classroom teaching, as well as c) the researcher's observations of the interactions between the second classroom teacher and single pupils – more specifically, pupils that have some kinds of socio-emotional or academic needs for support – strongly indicate that he follows pupils up based on the knowledge shared with his colleague.

The third classroom teacher is new to the class except for a few pupils that he has taught before in the school recently merged with the case school. This is the seventh and final grade of the elementary school. Teaching is now shared between several subject teachers in addition to the classroom teacher, who teaches Norwegian, mathematics and physical education, consequently teaching the class every day. The first classroom teacher is now retired, and the contact between the second and third teachers provides good opportunities for transferring their knowledge about the class. In the first interview, the third

teacher points out that ... “I do too poor a job of facilitating the teaching for all the pupils”. He also states that he has not yet gained a sufficient overview of each pupil’s need for individually adapted educational support. However, observations show that he has held a number of informal individual conversations as well as talking to small groups and the entire class. When taken together with classroom observations, the interviews confirm that a) he is steadily acquiring knowledge about each of the pupils, and b) he regularly cooperates with the second classroom teacher, sharing knowledge about their merged classes.

## Assessment

A great deal of the knowledge about individual pupils described above is, as indicated, informal and unsystematic information gathered together to a systematic assessment of pupils’ psychosocial wellbeing, academic mastery and abilities. This is an important part of assessment in the Norwegian elementary school where grading is not used the first seven years. The systematisation of relevant knowledge is an important part of assessment. What is assessment in an educational context? This study applies the following preconception (Johnsen, 2014b):

To assess and evaluate is to gather, interpret and reflect on a variety of information in order to adjust the direction towards a future goal. Educational assessment and evaluation consist of considerations and judgements about teaching and learning environments, processes and results, and about their contextual relations. Special needs educational assessment and evaluation draw attention to specific possibilities, barriers and adaptations concerning teaching and learning environments, processes and results, and their contextual relations.

Accordingly, assessment focuses on the learning process, level of mastery, abilities and need for educational support of every single pupil as well as the whole class. Similarly, it focuses on whether and how educational intentions, content, methods, class organisation, care and communication as well as contextual factors contribute to meaningful learning – or function as barriers to the learning processes (Johnsen et al, 2020). The classroom teachers in the case school use a combination of informal and formal assessment tools. An important and much used approach is the combination of teaching and assessing, or appraising teaching – also called formative assessment in didactics – where the individual encounter between teacher and pupil is central. Several pre-constructed assess-

ment tools of different kinds are also used. As an example of an early screening test of pupils' wellbeing at school, the first grade pupils are asked to fill in a form crossing over smileys or brows in answer to questions read by the teacher. Several such tests of different relevance and quality exist for very young pupils in the country, even examples compromising ethical principles. The teachers describe a number of constructed assessment tools they use:

- Word- and reading tests accompanying the ABCs
- Locally constructed reading skill tests for every grade levels
- National reading tests

Similar assessment tools are reported for arithmetic skills. As indicated above, the first classroom teacher compiles a holistic assessment of each pupil's psychosocial and academic status based on informal and constructed, daily and long-term assessments before scheduling meetings with parents. This information is also important when the school applies for additional resources due to pupils' special education needs in accordance with the Norwegian *Education Act*. It states that schools may apply for extra resources in order to give individually adapted education to pupils who need additional teaching that are not fully covered through ordinary resources. During the longitudinal classroom study, this was the case for three pupils. In these cases, the municipality's educational-psychological service (EPS) is responsible for further assessments and any recommendations for special needs educational resources. Special needs educators and psychologists at EPS apply a battery of assessment tools. In many cases, the *Wechsler Intelligence Scale for Children* (WISC) is part of their assessment. WISC is a standardized assessment tool that may indicate general levels of mastery and any causes of learning difficulties, for instance dyslexia.

The last few decades, there is increasing attention paid to broad international assessment programmes that measure selected areas of education, such as the Global Monitoring Report measuring quality in UNESCO's *Education for All* (EFA) programme and OECD's *Programme for International Student Assessment* (PISA). This demanding attention on measurement has a far-reaching impact on national Norwegian educational discourse, including individual schools such as the case school. Thus, the headmaster states that:

“... assessment is something that we are weakest at and must do something about. ... We are planning to spend the upcoming school year developing assessment forms that will be easy to use at every grade level”.

Here, the principal points to the tradition of how the school cooperates every year on a selected educational area of, as mentioned in the section on educational intentions below.

When it comes to international assessment discourse, there is growing criticism of what is perceived to be the general and delimited kind of information produced by strictly controlled programme measurements, including the PISA and EFA programmes (Alexander, 2015; Sutoris, 2018). It is argued that these tests lack cultural sensitivity and educational flexibility. Alexander (2015: 254) asks: “Why no pedagogy ...?”

## Educational intentions

Educational intentions are situated at the intersection of a) public intentions for education as stated in *Educational Act* and *National Curriculum*; b) pupils' own intentions; and c) the school's assessment and knowledge of pupils' level of mastery and learning potential (Johnsen, 2014b; Johnsen et al, 2020). Interviews with the principal and the three classroom teachers show that they have knowledge of general and subject-specific official intentions on each grade level and take part in discussions of new educational white papers when published. The first classroom teacher is appointed member of a cross-municipal working group to facilitate new national intentions to local schools. The case school is well aware of the principles of individually adapted education and rights to special needs education when needed. On a school level, practices on developing specific educational intentions take place on two levels:

- a) Teacher staff and school management work together to formulate annual educational intentions that are integrated in every subject on all grade levels. This is formulated in an annual educational activity plan and presented to families with children enrolled in the school.
- b) Every week, classroom teachers present a joint work plan for their classes with possibilities for adaptations. An example from third grade illustrates how i) the vast majority of pupils learn in accordance with these weekly goals; ii) two pupils who need more detailed step-by-step goals, learn in accordance with an adapted plan; and iii) special goals are made for one pupil who is following the same school subjects with adapted learning content.

## Educational content

Educational intentions and content answering the didactic question of "*what*" content education should contain. How does the case school select educational content so that all pupils are able to participate in a meaningful teaching-learning process within the community of the class? Focusing on what may be characterized as the everyday micro level, three aspects are found to be of main importance, namely a) flexible use of the content of the weekly work plan mentioned above, b) access to a large amount of teaching- and learning materials on different mastery levels, and c) the inclusive and cooperative mentality between the teachers.

- a) As described above, even though the class mainly has the same weekly work plan, the teacher adapts the plan's content in accordance with the diversity of pupils' assessed educational needs and makes agreements with individual pupils.
- b) A diverse arsenal of teaching- and learning materials is fundamental for individual educational adaptation. This is especially important at the first four grade levels, when basic reading, writing and arithmetic acquisition is established for the vast majority of pupils. Traditionally, there is a combination of classical, grade-based textbooks and additional materials. In the case school there is a special storeroom full of systematically labelled additional materials, whereof most have been designed by teachers through the years. Every teacher adds new material – for training, repetition, additional ways of understanding phenomena, learning through play and special challenges for advanced pupils; for individual learning tasks and for peer cooperation. The classroom teacher selects relevant material in accordance with the needs of their pupils and places them in the classroom.
- c) The material arsenal is both a documentation of teachers' extra work beyond regular working hours during many years and an indication of their awareness of the diversity of pupils' educational needs. It demonstrates not only a tradition of individual adaptation but also an attitude of inclusive cooperation and sharing.

In the fifth grade there is a success story showing how an advanced education course for two cooperating colleagues in the case school arouses the joy of learning in a pupil who has fought hard to train reading skills without quite succeeding, in spite of conscientious schoolwork and additional support received in former grades:

The two teachers attend a course in the Scottish *Storyline* strategy for active learning, taking pupils' interest and level of mastery as the point of departure (Mitchell-Barrett, 2010). They integrate the majority of the school subjects in a long-term project selecting as main content focusing on trees and what they can be used to. Running through a semester the project is concluded with a large exhibition of pupils' drawings, stories and woodwork, documenting great progress for the mentioned single pupil – not only in reading and writing, but all subjects integrated in the project, namely mother tongue, math, social science, nature and environment, arts and crafts.

This is an example of systematic and flexible adaptation of learning content within the community of the class.

Fifth grade marks a practical technological turning point due to the introduction of teaching with laptops. In the beginning, the teacher uses it together with the blackboard; soon, the laptop and whiteboard (with a flip-over) are the main teaching medium. In seventh grade, the use of laptops with internet access has become incorporated practice. Specifically two advantages are observed from using this new technology; a) the teacher does not turn the back on the class, but has eye contact with the pupils, and is therefore better able to adapt the teaching; b) a considerable amount of teaching material, further explanations and examples, as well as learning tasks, are accessible through the internet. Are there any downsides? Laptops and flip-overs do not manage to replace everything that the blackboard offers. After admitting this fact, the school reinstalls blackboards along with laptop boards in several classrooms.

As mentioned, seventh and last grade of elementary school contains subjects taught by a higher number of subject teachers. In the case class, pupils with reading difficulties are now fluent readers. A new pupil from abroad has Norwegian language as main subject. One pupil still receives daily extra support. An important task this school year is to prepare the pupils for their next educational step; lower secondary school.

## Educational methods and organisation

While educational intention and content are called the educational *what*, educational methods and class organisation are frequently characterised as the educational *“how”* (Johnsen, 2014b; Johnsen et al, 2090). It is a theoretical-didactic question whether methods and organisation should represent one or two main aspects. The reason why they are merged in this report is that there are exceptionally many grey zones between the two; a method may be realised

through a certain kind of organisation. How can educational methods and organisation support individually adapted education and inclusion? Applying a diversity of methods is a fundamental part of individually adapted education; and plurality in teaching-learning organisation facilitates opportunities for using a diversity of methods as well as content. Observations and interviews in the case school show rich, deliberate and sustained diversity of organisation on all levels; permeating long-term, weekly and daily activities. The long-term organisation consists of semester plans with specific focus-themes. For example, reading and writing are focused upon in grade four with an emphasis on diversity of methods – which is of great importance for pupils who need alternative support. As described above, the weekly plan connects pupils within the learning community while at the same time facilitates individual agreements with the teacher. A number of organisational arrangements are applied during the five years of the longitudinal study; some of these are used in special situations and for specific subjects or themes, while others become traditions. One daily organisational arrangements that has developed into a tradition is for pupils to spend the first 10 minutes of the school day reading a personally selected text of any kind. The first classroom teacher describes how this organisation came about:

I noticed that the children were annoyed and stressed on Monday mornings and I thought it might be because the weekend had been busy and with late evenings. Consequently, I thought of starting the day organising something that could help them relax and redirect their attention toward school. So, I organized a combination of relaxation and reading. I asked the children to place their heads on their desks and just relax, or find a text they could look at or read. Meanwhile, I played quiet music. It turned out that the pupils appreciated this, and we started beginning the school day with ten minutes of reading texts of their own choice.

Observations made during the longitudinal study show great individual variations in choices of texts – ranging from Donald Duck and other comic books to newspapers, textbooks, children's books and adult novels. On the first school visit to the fifth grade classroom, it was a surprise to find the whole class quietly reading their individually selected texts when we arrived with the classroom teacher five minutes into the first lesson. Reading at the beginning of the school day has become a tradition shared between the classroom teachers and their classes.

Traditional teaching has tended to concentrate on conveying subject content and logic to the class. Less focus has been on pupils' individual differ-

ences. Teaching has focused on a single method directed towards the whole class in so-called “class teaching”, catheter- or “podium teaching”, expecting pupils to be active in the learning process by listening, writing notes and making drawings. Several research teams in the *International Comparative Classroom Study* criticise this tradition. The Sarajevo team states: “It is quite obvious that the use of a single teaching method is outdated ...” (Johnsen et al, 2020). Organisational pluralism is applied at the case school in a flexible manner with regard to a) time perspective b) combination of class, group and individual focus c) educational scenes and locations, and e) educational resources. All of these organisational aspects make pluralism of methods possible. For example, reading acquisition is a topic with a large collection of different methods that are connected to an array of teaching and learning materials, as mentioned in the section on content. The two pupils who started out having difficulties ‘cracking the code’ of reading, reached fluency within the five first grades thanks to their readiness, determination and learning activities in interaction with the plurality of material, methods and organisation through differentiation and individual adaptation provided by their teachers and school.

## Communication

There can be no education without communication, no matter how qualified and relevant the adaptation of intentions, content, methods and organisation seems to be. (Johnsen, 2014b: 163)

Two main aspects of the curriculum relation approach, communication and care, represent an extension of the traditional didactic main aspects – assessment, intentions, content, method and organisation. They are taken from current special needs and inclusive didactics. The didactics of communication consist of two main aspects, communication technology and relational communication, whereof the relational aspect is focused upon in this case study. How does the human relation aspect of communication appear in the case school? Self-evidently, communication is primarily about teaching – about mediation of knowledge; however, it also has many other qualities. A summary of relational aspects of communication between teacher and pupils in the report of the international comparative studies of inclusive practices (Johnsen et al, 2020) contains characteristics that are also found in observations of the Norwegian case school and confirmed in interviews:

- Showing acceptance and appreciation of every individual pupil and the whole class
- Giving ample time for conversation with the pupil
- Waiting for the pupil's reaction
- Appreciating reciprocal information
- Trying to resolve misunderstandings
- Using verbal and nonverbal communication in general and facial expressions in particular
- Striving for insight
- Recognising and accepting the pupil's feelings, needs and individual learning strategies
- Repeating and clarifying instruction in accordance with assumed individual needs
- Giving positive feedback and praise in oral and written form
- Mediating the classroom dialogue in order to support the understanding of all pupils in general and pupils with hearing impairment and other disabilities specifically (Johnsen et al, 2020)

On request, one of the classroom teachers sums up what communication means to her:

- To understand the pupil
- To communicate on the pupil's level
- To try and see all pupils equally well
- To consider pupils' different possibilities to thrive both inside and outside of school
- To communicate academically means to adapt dialogue to each individual pupil

In the everyday schooling, communication is partly systematically planned and partly "automatic" and tacit. This is the case for the three classroom teachers. They tell about informal and planned individual dialogues. The flexible organisation of schooldays creates opportunities for communication with the whole class, groups and individual pupils. The typical arenas for communication with groups and pupils are mainly when they work in groups or individually. Pupils with special educational needs of some kind get more attention than others. The three classroom teachers are observed using a combination of different approaches in the communication with the whole class in order to adapt to their pupils' different levels of understanding and mastery. Each teacher does this in their own style and adapted to pupils' ages and interests. During the first years of schooling, informal talks with single pupils are observed in several situations, such as in the

classroom's doorway as the teacher greets the pupils by shaking hands. Individual talks take place in connection with adaptations of weekly plans. The majority of pupils like to work in pairs or groups, while a few work individually; the classroom teacher is observed giving the latter group special attention. Disagreements and quarrels among pupils occur on all age levels, and all three teachers use a combination of individual talks and joint dialogues in such occasions. The first teacher states that "... it is necessary to follow up each pupil individually concerning their wellbeing at school". The teachers' dialogues with their pupils also serve as relational models. Educating the pupils in communication is an important interdisciplinary part of schooling, starting in first grade and continuing throughout school. It prepares the pupils to present information, discuss, search for clarification as well as participate and cooperate with their peers and others. It educates them in the nuances of dialogue such as turn taking and the crucial component of dialogue that Rinaldi (2001) describes as the pedagogy of listening.

Thus, according to the teachers, relational communication is a professional educational aspect of high relevance when interacting with all pupils, and of special importance when interacting with pupils who have difficulties, disabilities and special needs. When discussing this topic, they often characterise positive relational communication as 'care'.

## Care

Given the close connection between communication and care, why establish care as another main aspect of the curricular relation approach? Similar to communication, care represents an extended professional understanding compared to traditional narrow discipline- or knowledge focused education. It emphasises that positive learning depends on the satisfaction of basic human needs (Rye, 2005), including a sense of belonging, love, acceptance, recognition and respect. Therefore, we need to be aware of not only the pupil, but the whole child – and adolescent – within their social and cultural context. We also need to be aware of the joint cultural heritage and conditions that we share with our pupils – with their potential for joy as well as barriers, disappointments and traumas. Having knowledge about and caring for pupils' personal living conditions and the whole range of their developmental potential and needs is a challenge for educators (Johnsen, 2020a; Johnsen et al, 2020). How is care manifested and discussed? Caring relations between educators and pupils fall under the following categories:

- a) focus on the whole child/adolescent
- b) a sense of belonging
- c) recognition
- d) supporting pupils' experience of mastery
- e) supporting expression of feelings
- f) sharing personal experiences
- g) encouraging peer cooperation and care
- h) having awareness of the pupil inside and outside the classroom and school
- i) participation in developing coping and mastering strategies

These categories, which are taken from the international comparative studies (Johnsen et al, 2020), are also found in the Norwegian case. The teachers point to the importance of knowing every single pupil well, and they tell about their “working principles” supporting their awareness of care; a) the prevention or precautionary principle; b) the principle of flexibility; and c) of seeing all and leaving nobody behind. They both inform about and show results of awareness campaigns for care between peers, for instance anti-bullying and peer cooperation campaigns as well as “wellbeing rules”. However, care is accompanied by concerns – for different reasons. Some concerns lead to cooperation with external professional partners, including cooperation with child welfare services. The school principle tells:

A few years ago, cooperation with external caring professions was rarely considered necessary, but it seems that the conditions for an increasing number of families have become difficult for different reasons. Consequently, today we have regular meetings in a group of national and municipal welfare agencies in child- and social welfare as well as health, working towards achieving coordinated support.

## Interrelations, dilemmas and challenges

This article is a brief summary of how the case school teaches in accordance with pupils' different levels of mastery and needs for support within the community of the class. The selected examples concern social and academic inclusion. The findings are structured in didactic-curricular areas or categories. Self-evidently, an article of this limited size only refers to a small number of examples. The focus is to describe and discuss activities that contribute to individually adapted teaching, learning and development within the community of the class and thereby to inclusion. The study also reveals several dilemmas and challenges in the process of developing inclusion, such as the following:

- In the process of getting to know a pupil, there may be many dilemmas when sorting out what is important, what might be useful to keep in mind and what is irrelevant and should be forgotten.
- A main dilemma and challenge in assessment is finding and confirming a realistic level of mastery and learning opportunity without causing negative labelling. This dilemma also applies to the use of special content and methods.
- There are dilemmas connected to organising workshops and courses outside the classroom. In the case school, intensive training workshops of specific skills, such as in reading or arithmetic, are practiced. They are as a rule initially fascinating and popular and fellow pupils compete to join their classmates. However, after a while the pupils who need the extra teaching go alone out of the classroom – sometimes reluctantly, as confirmed in observations. The dilemma is that the workshops clearly provide important support in the learning process, as indicated by the progress made by the three pupils attending the workshops, all of whom acquire excellent reading skills. On the other hand, pupils says that leaving their classroom is sometimes uncomfortable. The question about why they have to leave their classroom is often asked in the inclusion discourse. A counter question is why is organisation in individual, pairs and groups with out-of-classroom tasks used so seldom for different kinds of tasks and pupils on all achievement levels?
- Several dilemmas are identified between national policies and the school's needs for individual flexibility. This happens even though Norwegian national curriculum is a framework curriculum that has a certain amount of flexibility including opportunities to make exceptions. The teachers point to increasing national demands concerning learning content. They argue that national and international assessment programmes, specifically OECD's PISA programme, direct the attention on national and school competitions while the emphasis on pupils' well-being is fading.
- Practicing resource-based communication and care is an ever-present professional challenge. The three teachers show in their practice that it is possible to practice professional care and resource-based communication alongside academic quality; seeing and hearing every single pupil in the community of the class. One teacher argues:

“It is not for nothing that teaching is called a caring profession, but care and neutrality do not go comfortably together. Professionalism lies in striving to care even-handedly.”

## Trustworthiness and authenticity of the case study

Qualitative studies seek to uncover detailed data about the circumstances, activities and contexts of a phenomenon. “The quality of qualitative studies” depends on every part of the study being subjected to an examination of possible deficiencies or bias and that these are described and discussed in the research report. As mentioned, the longitudinal classroom study of inclusive practices is an instrumental single case study where selected practises are described in detail. Moreover, these practises are evidence-based through non-participatory and participatory classroom observations and open interviews based on pre-informed themes with classroom teachers and principal (Simons, 2015; Stake, 1995). Several scholars have discussed and refined methodological aspects of qualitative research, such as Stake (1995), Denzin (2009) and Creswell & Poth (2018), to mention three outstanding scholars. Different scholars emphasise slightly different evidential criteria. However, most of the mentioned criteria are covered by the two complementary main concepts of trustworthiness and authenticity (Guba, 1981; Lincoln & Guba, 1986/2007), which are used in the following quality check.

**Trustworthiness** is evaluated via credibility, confirmability, dependability and transferability.

**Credibility** concerns “the truth value” of a phenomenon, or if a study is perceived as being “true”, or valid, from preparation to presentation by researcher and participants, who in this case are the classroom teachers and school administration. Thus, the following steps evaluate the truth-value:

- Preparation phase: Research plan, selection of case, information to stakeholders, who are 1) the municipal school office, 2) the three classroom teachers, 3) all teachers at the case school, 4) all parents pupils in the case class; and 5) securing anonymity.
- Explicit theoretical foundation: Special needs and didactic-curricular relation approach concerning individual adaptations in the community of the class (Johnsen, 2014b) together with culture-historic theory of teaching, learning and development, as discussed in research plans (Johnsen, 2013a; 2013b).
- Implementation phase: A set of research procedures is applied in order to omit biases and strengthen joint perceptions of the study’s truth value or credibility: a) prolonged engagement in the field in the longitudinal study (four years); b) triangulation of method: participatory and non-participatory

observations, open interviews with pre-informed themes, material and text gathering and analysis; c) observations and interviews about focus topics and context; d) thick descriptions of individually adapted teaching-learning processes within the community of the class (Collingridge & Gantt, 2008; Creswell & Poth, 2018; Geertz, 1973; Guba, 1981; Moon et al, 2016; Northcote, 2012; Tracy, 2010).

**Confirmability** is about whether reported findings are answers to the research issue or the result of research bias. A set of “control mechanisms” are constructed in order to account for possible biases: a) revealing underlying assumptions of the research issue; b) ensuring that interpretations and conclusions are grounded in evidence by reporting the classroom teachers’ experiences and views; c) the emic perspective of the classroom teachers are strengthened by their internal auditing or member checking. Thus, researcher’s notes from selected interviews are checked by the first teacher and revised accordingly. Member checks of the two other teachers are until now limited to clarifications and discussions, d) methodological descriptions such as these are intended to minimise or, at best, avoid biases (Gill, Gill & Roulet, 2018; Guba, 1981; Moon et al, 2016; Northcote, 2012).

**Dependability** concerns the stability and consistency of findings in qualitative studies. Qualitative or naturalistic studies are not suitable for direct replications of the kind that are used in controlled quantitative studies, since contexts are crucial aspects of qualitative research. However, logical, consistent and approximately similarly perceived processes and findings are hallmarks of trustworthiness. Armstrong (2010) applies the concept of accuracy in her arguments for recommended steps to verify findings and interpretations, including triangulations, stepwise replications and internal audits, mentioned above (Gill, Gill & Roulet, 2018; Guba, 1981; Moon et al., 2016; Northcote, 2012).

**Transferability** concerns whether results of a study can be transferred to other contexts, and hence the truth-value of replicating. Transferability depends upon thick descriptions, meaning description of the case in context. This has been compared to external validity in quantitative research, or the validity of applying the conclusions of a scientific study outside the context of that study. In other words, it concerns the extent to which the results can be generalized to and across other situations, people, stimuli, and times. Some scholars within qualitative research indicate (Stake, 1995) or argue explicitly for techniques for generalising from a single case (Simons, 2015). The stand in this article is

that qualitative case studies are not generalisable in traditional sense, but may be transferable if they meet the requirements mentioned above; that they are presented as thick descriptions and meet requirements of trustworthiness; that is, fit to be replicated in other contexts. Only after a considerable number of replications the question of generalisability is relevant for case studies such as this (Anney, 2014; Gill, Gill & Roulet, 2018; Guba, 1981; Johnsen, 2020b; Johnsen et al, 2020; Korstjens & Moser, 2018; Moon et al, 2016; Schwandt, 2007; Shenton, 2004).

**The authenticity perspective** of quality draws the attention to a dimension that is unique for ideographic, qualitative research characterized by its "... relativist ontology and an interactive, value-bounded epistemology" (Lincoln & Guba, 1986: 20). While conventional experimental methodologies are based on value neutrality, naturalistic, qualitative methodology is based on value awareness. How is it possible to account for the authentic value position of a qualitative inquiry? Lincoln and Guba (1986) introduce five criteria that followers are in the process of developing further. These are a) fairness, b) ontological authenticity, c) educative authenticity, d) catalytic authenticity, and e) tactical authenticity (Johnsen, 2020b; Lincoln & Guba, 1986; Manning, 1997; Schwandt, 2007; Shannon & Hambacher, 2014). The question of evidence in this case study is attempted answered through examining these aspects in addition to trustworthiness.

**Fairness** concerns the argument that qualitative studies are constructed in accordance with value systems that are accounted for (Johnsen, et al, 2020) in this case study, as discussed in the following:

- The theoretical pillars are "cultural-historical" approach to teaching, learning and development in context (Vygotsky, 1978) and the didactic-curricular perspective on inclusive practices (Johnsen, 2013a; 2014b)
- The classroom study is based on international values stated as the universal declaration of human rights (UN, 1948), children's rights (UN, 1989), the rights of persons with disabilities (UN, 2006), and the Salamanca Statement (UNESCO, 1994) introducing the principle of the inclusive school, and also the Norwegian Education Act (1998 with amendments) and Curriculum for the 10-year compulsory school in Norway (L 1997).

The second main aspect of fairness concerns that participants and other stakeholders have a voice in the inquiry. Thus, as mentioned above, parents and all teachers at the case school have been informed and given their consent to the study. During the longstanding or prolonged engagement in the case study, the classroom

teachers and headmaster have participated in open interviews and dialogues. Key information has been peer debriefed and subjected to member reflections in the dialogues. The full draft of this article will be sent to the key informants for internal auditing. Theoretical basis has not been discussed in the case school, but questions of school policies together with pupils' rights and needs have been frequently commented on. The case study has been presented at an international conference. The draft is sent to peer reviewers for external auditing. In spite of the limited article format, contextual aspects are connected to descriptions. In this way, the construction and value system of this qualitative classroom study are shared and discussed to a certain extent with main informants, and research colleagues.

***Ontological and educative authenticity*** occur when the participants gain a) increased experience with a phenomenon's complexity; in this case the classroom study, and b) an awareness that the inquiry and cooperation has led to increased understanding of different value systems. The open interviews with the three classroom teachers and headmaster have taken place as dialogues which shared information exchange accompanied by increased awareness of the practitioners as well as the researcher; i) by the teachers about the value of individually adapted teaching and inclusion; and ii) by the researcher about the complexity of everyday teaching and learning processes and wellbeing of all pupils.

***Catalytic and tactical authenticity*** concerns the innovative power of qualitative research. Thus, assessment of catalytic authenticity focuses on examining if and how the inquiry process stimulates stakeholders' engagement. The criterion for tactical authenticity is whether the findings lead to participants' empowerment or impoverishment. A fair answer to the four authenticities might be that the dialogues throughout the longitudinal classroom study have gained attention and awareness of participating teachers as well as school administration. However, assessing the authenticities using systematised questions has not been submitted to the informants. This may, however, take place in conjunction with the presentation of the study and its findings (Geertz, 1973; Johnsen, 2020b; Lincoln & Guba, 1986; Manning, 1997; Schwandt, 2007; Shannon & Hambacher, 2014; Simons, 2015).

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# PART THREE

## INTERNATIONAL CLASSROOM STUDIES OF INCLUSIVE PRACTICES COMPARING TEACHING-LEARNING PROCESSES

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Citation of this chapter: Johnsen B. H., Igrić L., Rapaić D., Salihović N., Jachova Z., Košir S., Zečić S., Kristiansen S. D., Angeloska-Galevska N., Cvitković D., Dizdarević A., Galevska A. K., Hadžić S., Ilic S., Kogovšek D., Lisak N., Nedovic G., Ozbič M. and Stojkovic I. (2020) International Classroom Studies of Inclusive Practices. B. H. Johnsen, L. Igrić, D. Rapaić, N. Salihović, Z. Jachova, S. Košir, S. Zečić, S. D. Kristiansen, N. Angeloska-Galevska, D. Cvitković, A. Dizdarević, A. K. Galevska, S. Hadžić, S. Ilic, D. Kogovšek, N. Lisak, G. Nedovic, M. Ozbič and I. Stojkovic (Ed.), *International classroom studies of inclusive practises* (pp.213-422/pp.223-432 in print edition). Cappelen Damm Akademisk. <https://doi.org/10.23865/noasp.122>

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# 1 Introduction

## How does school teach in accordance with pupils' different levels of mastery and needs for support in the learning process (resources, barriers and dilemmas)?

This is the primary research question in *International Comparative Classroom Studies towards Inclusion* (WB 04/06, 2006)<sup>42</sup>. The joint research topic deals with development towards an inclusive school. The principle of inclusion is described as follows in the joint research plan (Johnsen, 2013a: 228):

Inclusion is the global policy prescribing development towards a local regular school that welcomes all children with their unique individual characteristics, interests, abilities and learning needs; all children with and without special needs and disabilities; a school combating discriminatory attitudes, and offering meaningful and individually adapted education to every pupil within the community of the class (Frederickson & Cline, 2002; Johnsen, 2000; UNESCO, 1994).

Research teams from seven universities in six European countries participate in the joint research, including the universities of Belgrade, Ljubljana, Sarajevo, Skopje, Tuzla, Zagreb and Oslo. Focus is on selected ordinary schools' and educational teams' activities and interaction with individual pupils as well as the collective basis of the class; also called *the master-apprenticeship relation* (Dennen & Burner, 2008; Lave & Wenger, 1991; Rogoff, 1990). The classes in focus of the studies contain a diversity of pupils, including pupils with special educational needs and disabilities. The primary research question or issue directs the attention to the phenomenon's complexity. Subsequently, this research report contains a joint comprehensive presentation of findings that contribute to answer the primary research question: How does school meet the educational needs of every pupil in a diverse class? The concepts "school" and "educational team" refer to regular teachers and special needs educators as well as school administrators and assistants – in other words, the staff members who work together adapting and implementing the teaching process to the educational needs of the individual learners within the class community<sup>43</sup>.

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42 The title *International Comparative Classroom Studies towards Inclusion* (WB 04/06, 2006) is hereafter shortened to *Inclusive Practices* in the main text.

43 In addition to the concepts of "school" and "educational team", two other concepts are frequently used in this presentation, namely "teacher" and "special needs educator". In schools organised with classroom teachers and special needs educators, these are most often the staff who are in the best position to have thorough knowledge about and are in close contact with individual pupils and the class as a whole. They therefore often represent "school" in this presentation.

Before presenting research findings, the seven participating studies that comprise this research project are presented summarily. The titles of their research plans give an indication of the diverse research focal points:

- University of Belgrade: A Study of the Implementation of a Legal Framework for Supporting Children with Disabilities in Regular School (Rapaić, Nedović, Stojković & Ilić, 2013)
- University of Ljubljana: A Study of the Process towards Inclusion Related to Slovenian Pupils with Hard of Hearing or Functional Deafness (Kogovšek, Košir & Ozbič, 2013)
- University of Oslo: A Classroom Study of Inclusive Practices (Johnsen, 2013b)
- University of Sarajevo: Supporting Pupils with Language and Speech Difficulties in Regular Primary Schools (Zečić, Džemidžić Kristiansen, Hadžić & Čehić, 2013)
- Ss. Cyril and Methodius University of Skopje: A Case Study of a Child with Cochlea Implants within the Inclusive Classroom (Jachova, 2013)
- University of Tuzla: Provision of Education and Rehabilitation Support of Children with Special Needs in Regular Classrooms (Salihović, Dizdarević & Smajić, 2013)
- University of Zagreb: Supporting Inclusion of Children with Special Needs. A Study of Classroom Assistants and Mobile Team of Special Needs Educators in Regular Schools (Igrić & Cvitković, 2013)

The studies' methodological approaches are predominantly qualitative as described in the following (Johnsen, 2014a):

### **Methodological approaches**

- Case study: 5
  - ▶ Single-case study: 4
  - ▶ Multiple-case study: 1
- Longitudinal study: 2
- Pilot study: 1
- Action research: 3
- Qualitative approach: 3
- Mixed methods approach: 3

### **Methods**

- Questionnaire: 2
- Interview: 5

- Observations: 6
  - ▶ Non-participative observation: 1
  - ▶ Participative observation: 3
- Document analysis: 3
- Analysis of school documents, teaching material and pupil work: 3

However, the diversity in research foci and methodology is embedded within the joint research issue and common didactic-curricular<sup>44</sup> basis of this international comparative research project, as discussed in the joint research plan (Johnsen, 2013a) and further reflections in this report.

The findings presented here are obtained from selected project schools on the so-called internal micro dimension or level, as described by Robin Alexander (2000) in his major work, *Culture and Pedagogy – International Comparisons in Primary Education (Five Cultures)*, and further writings (Alexander, 2009). Thus, the joint focus is on school's internal micro dimension, also called inner activity (Johnsen, 2014a), and the ability to develop inclusive practices. The main issue or question mentioned above concerns how to construct a bridge between the principle of inclusion and practices related to individual pupils as partners in the joint class or group. The question challenges practitioners as well as researchers to consider a) what “professional tools” are available for planning, practicing, assessing and revising a teaching process based on pupils' diverse mastery and capability levels – and that are meaningful to their learning process, and b) to embed the teaching-learning process within the classroom community. The extent to which schools aim towards these expectations determines if they are arenas for developing inclusive practices, as argued in Johnsen (2014a). What are these “professional tools” or arenas? How can they be described in researchable terms? In this research project, a common set of didactic-curricular categories represents key aspects or main arenas of the teaching-learning situation and process. They are interrelated with the intended tool users, the practitioners working in school as well as researchers exploring school's practices. The main areas are:

- pupil/s
- assessment
- educational intentions

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44 The concept of “didactic-curricular” is used to connect the application of the term “curriculum” in Anglo-American educational terminology and Continental-European use of the term didactic. Similar to the terms “pedagogy” and “education”, they tend to be used interchangeably (Johnsen, 2014b).

- educational content
- methods and organisation
- communication
- care
- +
- context / frame factors

These didactic-curricular main aspects or categories are theoretically reflected upon and developed in advance of the empirical studies. They are discussed in some detail in an article in the second of the three project anthologies (Johnsen, 2014b). They have also been tried out in practice and innovation – in particular in a longstanding innovation project between the universities of Oslo and Tuzla/ Sarajevo in Bosnia-Herzegovina in collaboration with selected project schools (Johnsen, 2007). Applying the mentioned didactic-curricular main aspects is therefore familiar to these researchers at the start of the international comparative classroom study (O, S, T), as well as introduced to the other participants (B, L, MS, Z). A similar procedure for applying a set of predetermined categories directing the study focus as well as analysis of findings is also discussed and used in Alexander's international comparative studies, where each category is selected through a line of reasoning. When taken together, the categories constitute what he calls a general framework of internal micro dimension as a generic model of teaching (Alexander, 2000: 325; 2004; 2009). But, the choices of main categories in the two different research projects only partly overlap since they are developed in accordance with different main research issues.

### **This research project is based on three pillars**

- 1) The mutual interrelations between the didactic-curricular main aspects are illustrated in the figure below. They function both as research focal point and as main categories in analysis of findings. Hence, this applied comprehensive didactic-curricular approach represents one of the main pillars in the joint research project (Johnsen, 2014b).
- 2) The second pillar is Lev Vygotsky's cultural-historical approach to the process of teaching-learning-developing, which is summarily illustrated by his a) focus on the Russian concept of "obuchenie" – meaning *teaching and learning*, but which, unfortunately, is often translated solely with *learning* in Anglo-American inspired texts; and b) introduction of the concept *zone of proximal development* (Alexander, 2009; Chaiklin, 2003; Daniels, 2014a;

Ivić, 2014; Johnsen, 2014c; Vygotsky, 1978; 1987; Wertsch, 1984; Wertsch & Tulviste, 1992).

- 3) The third pillar consists of the resource-based interactive approach between caregiver and child developed by Rye (2001; 2005) and Hundeide (2010). In this research project focus is on examining and categorising if and how teachers' and special needs educators' communication and mediation with single pupils and the whole class is based on the pupils' mastery and learning capability in the zone of proximal development.

Together, the three pillars set the perspective for exploring practices of individually adapted education in the community of the class. The didactic-curricular approach contributes to clarify important arenas or aspects of the teaching-learning process – “obuchenie” – in a resource-based, caring perspective towards inclusion. Thus, the eight main aspects function as focal points or arenas in the field studies as well as in analysis and results. They are bridges between the principle of inclusion, the theories of teaching, learning and development and the concrete studies of inclusive practices (Johnsen, 2014b).

Based on the three pillars briefly described above, the subsequent presentation of findings is structured in accordance with each of the eight main aspects. The practitioners are mainly, but not solely, ordinary classroom teachers and special needs educators. Their activities related to the eight didactic-curricular aspects are thus explored, analysed and described<sup>45</sup>.

What kind of empirical findings are presented? The investigation focuses on how school develops and practices educational inclusion. Good practices, dilemmas and challenges are reported. Statistical comparisons are scarce; they are largely applied as part of the backdrop. The main findings are qualitative and based on observations and interviews. The different research teams focus on different aspects represented in the curriculum relation approach and model; some teams focus on all aspects while others examine selected aspects. Thus, all the seven studies are in accordance with the specific research topic of each team

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45 References to the seven studies are given with the following abbreviations:

B: University of Belgrade

L: University of Ljubljana

O: University of Oslo

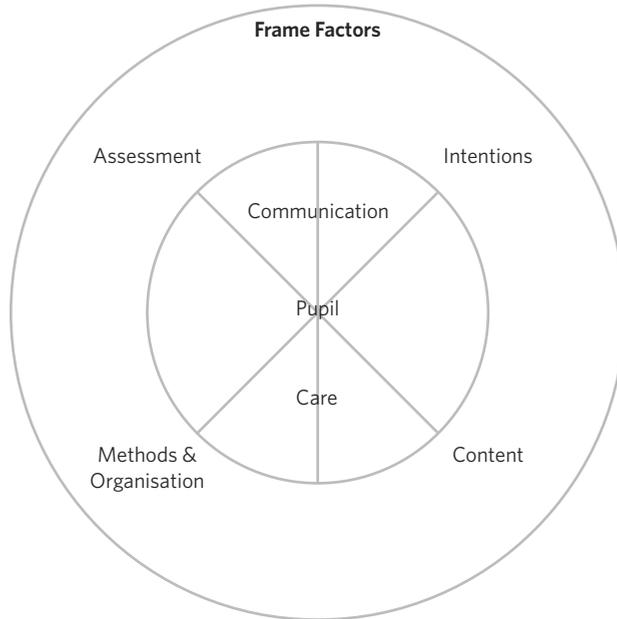
S: University of Sarajevo

SM: Saints Cyril and Methodius University of Skopje

T: University of Tuzla

Z: University of Zagreb

Not all findings are referred to the particular study for reasons of anonymity.



**Figure 1.** *The Curriculum Relation Model* revised in Johnsen (2007)

and at the same time based on the joint research issue and approach as a basis for the cooperation, as indicated (Igrić & Cvitković, 2013; Jachova, 2013; Johnsen, 2013a; Kogovšek, Košir & Ozbič, 2013; Rapačić, Nedović, Stojković & Ilić, 2013; Salihović, Dizdarević & Smajić, 2013; Zečić, S., Čehić, Džemidžić Kristiansen & Hadžić, 2013).

Upon considering the different contexts and flexible use of the joint curriculum relation approach and accompanying focus areas of the seven participating studies, the question arises: What is being compared? Using a classical metaphor, the question is whether they are “apples and oranges or different kinds of apples”. The above account clarifies that the findings are categorised as “different kinds of apples”, or empirical phenomena with similarities and differences, each within different contexts. This research report is constructed through a series of joint compilations and revisions conducted by all research teams. Questions regarding the findings’ validity or truthfulness and authenticity are discussed in detail in the chapter on methodological considerations.

The report is divided into 16 chapters with sub-chapters, as described in the introduction.

## 2 The pupil in the community of the class

The pupil in the community of the class is the topic of the first chapter presenting findings. This topic lies symbolically in the centre of the curriculum relation model, demonstrating that the relationship between teacher and pupil – characterised as pupil centred teaching – is of primary concern in inclusive education. Accordingly, a key aspect of inclusion is that schools focus on the pupil as an individual within the classroom community.

What kind of knowledge about pupils is in focus? What kind of information do teachers, special needs educators and educational teams gather and present? How does this knowledge support individual adaptation and flexibility in the teaching-learning process? These are main questions guiding studies of schools' knowledge about single pupils in the community of the class. How is this arena explored? The most widely used methods are observations and/or open or semi-structured interviews. In addition to studying the schools' knowledge about their pupils, several of the teams implement assessments of focus pupils' levels of mastery in a pre-post design in order to measure increased skills and knowledge. In the following presentation, several types of information are gathered from the seven studies and categorised under relevant sub-questions. The development of categories and presentation of findings concerning knowledge about the pupil/s is open or "grounded" in the sense that it is derived from the empirical data. Accordingly, the chapter is divided along the following questions:

- Who has knowledge about the pupil/s?
- Who are the pupils in focus?
- What kind of knowledge is in focus?
- Dilemmas
- Summary

### Who has knowledge about the pupil/s?

In the majority of the seven studies, the teacher is the main actor who knows most about the individual pupil. The teacher's main informant is the individual pupil. Teachers gather information about different aspects of pupils' life in school and outside, not only their schoolwork and test results, but through everyday observations and conversations. Similarly, knowledge is gathered through dia-

logue with parents. Classmates may also have extensive personal knowledge about their peers, as described below (O, S). Some of the schools have educational teams where all members cooperate in gathering and sorting knowledge for further planning of the teaching-learning process. In addition, several of the participating schools cooperate with external counsellors, such as educational-psychological services, resource centres, medical professions and other available professionals. Alongside teachers, special needs educators play a prominent role in pupils' schooling. Thus, in five of the participating teams, special needs educators help teachers focus on relevant information. However, none of the participating special needs educators belongs to the individual school's permanent staff; rather, they are employed either at special schools or on behalf of a project university. In one case, a non-governmental organisation (NGO) contributes with salaries for external special needs educators who contribute to the project (Z).

Principals in all research schools have received information and approved the studies. They also supply answers for information requests. In one of the project schools, the principal has a particularly active role in its teamwork (T). The Croatian study is extraordinary because in addition to the external special needs educator acting as advisor to the class, they engage an assistant to support and relieve the classroom teacher (Z).

The role of the teacher differs in accordance with traditions and mentality in the participating countries; consequently, the different roles create various possibilities to gather information. Thus, concerning the amount of time a teacher has to get to know his/her pupils, two of the participating countries seem to belong at opposite ends of a continuum. In the Norwegian school, the same classroom teacher teaches all or most subjects during the first four school years. In contrast, the Macedonian school has eleven teachers who each teach a specific subject at each grade level throughout the school year (SM). Consequently, the Norwegian teacher has considerably more time to acquire in-depth, comprehensive knowledge of each pupil than the Macedonian teachers do, and different strategies may be used to collect information. Since the Norwegian study is longitudinal and lasts over a period of almost six years, three classroom teachers have participated in the study (O).

## Who are the pupils in focus?

The majority of the seven studies focus on 1) pupils with different special educational needs within regular classes, 2) their relationships with their classmates and 3) their individual educational needs. The pupils in focus are the following:

- B: The University of Belgrade: Pupils with different special educational needs in regular classes
- L: The University of Ljubljana: Adolescent pupils who are functionally deaf or hard of hearing in regular and special classes
- O: The University of Oslo: All the pupils in an ordinary class with and without special educational needs.
- S: The University of Sarajevo: Pupils with speech and language challenges in regular classes
- SM: The University of Ss. Cyril and Methodius, Skopje: One pupil with cochlea implant in a regular class
- T: The University of Tuzla: Pupils with different special educational needs in regular classes
- Z: The University of Zagreb: One pupil with psychosocial difficulties in a regular class

## What kind of knowledge is in focus?

There are two high-priority areas: 1) academic level and progress, and 2) psychosocial wellbeing and mastery. 1) In six of the studies where one or several pupils with special educational needs are in focus, their level of knowledge and skills, including mastery of school subjects, are assessed more or less in detail. For some of these pupils, this is the first time they receive a systematic and detailed special needs educational baseline assessment with accompanying recommendations for teaching and learning. An important part of the special educational knowledge tradition consists of finding ways to overcome learning difficulties by "going around the challenge", and there are reports about successes, but also worries whether or not recommended teaching procedures will prove successful.

2) Pupils' psychosocial relationship and functioning is another topic of great attention. Questions concerning relationships with peers both in and outside of class are examined for pupils in general and specifically for those with hearing disabilities. There is focus on learning about peer relationships for pupils with psychosocial and behavioural challenges as well as for those having language and communication challenges. In addition to these areas, a variety of different personal and contextual aspects are investigated, including personal history, interests and characteristics, family relationships and important environmental influences.

Reports show concerns expressed by teachers, special needs educators and parents with respect to pupils' social acceptance and academic mastery. However,

mixed in with concerns there is hope of developing classes where all pupils are included and have a common sense of ownership.

What do the schools recommend as relevant and necessary information about individual pupils in order to teach according to their different levels of mastery and proximal learning capabilities? The above-mentioned findings provide examples indicating answers to this crucial question. Following this summary, a reported example offers a coherent illustration based on information is gathered from a series of observations together with open interviews focusing on each pupil over a period of three years. The informant is a classroom teacher who has been responsible for the case class throughout its first four years at school. The class consists of thirty pupils, a number that fluctuates, as there are incoming and outgoing pupils whose families have moved to or from other school districts. Asking what is most important to know about each of her pupils, she replies:

I emphasize wellbeing ... that the child is thriving. If I discover that a pupil is not flourishing, I try to do something about it ... that everyone has someone to play with, that no one should be allowed to say no when someone asks them to play (O).

When it comes to academic levels of mastery, she points out that since she has been their teacher for several years already ... “I suppose I know where each of my pupils can perform a bit more” (O). How does she acquire this knowledge? Through talks with individual pupils, informal and formal assessments, school- and homework, observation of pupils’ activities and interaction both in the classroom and outside during breaks, she tells. She regularly reviews each pupil’s workbooks in all school subjects. One important and consistent source of information is the weekly learning plan – or class/individual curriculum – that displays every subject taught. The pupils also have their own “intermission-book” where they write all kinds of things about themselves. These notebooks tell the teacher a lot about her pupils’ interests, likes and dislikes. In addition, the teacher has her own “pupil book”; a kind of logbook where she notes information observed during the school days. She reviews these books before every meeting with the pupils’ parents, who in turn provide important information and expectations concerning their child.

This teacher’s stance is similar to that of educational philosopher Nel Noddings (1992; 2003), who argues that pupils are not merely pupils; rather, they are comprehensive and multifaceted human beings. In a typical local Norwegian school, pupils are familiar with their classmates’ other qualities beyond

the academic. This awareness is highlighted in the Howard Gardner- inspired practice-oriented *Multiple Intelligences in the Classroom* (Armstrong, 2003 in Norwegian translation by M. K. Ofstad). There all classmates have a weekly assignment to select the number one area of “cleverness” or “intelligence” for each classmate, one at a time. Consequently, the pupils are “labelled” with what they are considered to perform best at, whether it is dancing, football, skiing, chess, etc. Only positive characteristics are presented and discussed, and the teacher learns a lot about her pupils through their classmates.

The Norwegian case school cooperates with several external services and professions, including 1) medical services if a pupil has a chronic disease that affects his or her schooling and development; 2) local educational-psychological service and possibly national resource centre in case of special needs and disabilities; 3) local child welfare authorities and other relevant institutions. All are important sources of information, knowledge exchange and cooperation. Subsequently, both internal and – in some cases – external information create a holistic impression of each individual pupil (O).

Providing more concrete in-depth information from the single-case study, the teacher describes the knowledge she has about each of her pupils and her relationship with them. It turns out that she has deep academic and psychosocial knowledge of each of her pupils. She knows a lot about their interests and challenges both in school and in their home environments.

On the question if any dilemmas or challenges ever arise after having acquired such detailed information about each pupil. She replies that not all information is relevant; indeed, there is gossip about pupils and their near surroundings:

“You have to sort out what may be relevant from what is not”.

However, sometimes what has seemed unimportant suddenly sheds light on problems a pupil is facing – or vice versa. What does the teacher focus on; the individual pupils or the diversity of the class? In her view, each single child relates to the class’ diversity in their own specific way. The different class-plans or weekly curricula may serve as an illustration of this educational diversity. All but one pupil has the same curriculum. However, on the one hand three pupils have shorter and more concrete reading assignments since they are still learning to recognise a few letters’ sound-sign relationship as well as break down long words. On the other hand, three pupils have additional and more challenging arithmetic assignments than the rest of the class due to their high level of interest and mastery. Another of the pupils has an individually designed weekly

plan comprised of the same school subjects and much of the same content as the rest of the class; yet this pupil also has shorter and – at times – different assignments. These are examples of differentiated weekly workloads related to the teaching-learning classroom community. Class observations support the information provided by the teacher. This multifaceted knowledge of the pupils (O) resembles descriptions from other teams, more specifically from Sarajevo (S) and Tuzla (T).

## Dilemmas

Three kinds of dilemmas related to gathering knowledge about individual pupils are reported. 1) Teachers and special needs educators get information about pupils and their relationships that are irrelevant for both the school and teaching-learning relationship. Some of the information flow may be gossip and “should be forgotten”. In some cases, it is difficult to distinguish between unnecessary and important knowledge. 2) Sometimes it is difficult to spot important information about serious difficulties hidden in small talk. Perhaps it is the pupil him-/herself who tries to ask for the teacher's help against bullying, abuse or other psychosocial and academic problems. In the Norwegian case, interviews with teachers and principals reveal that the case school has a practice concerning dilemmas and challenges like these: The teacher contacts the principal about problematic information and they discuss the matter – in some cases with the entire administration – before they decide whether to act according to the information or to set it aside (O). 3) Much of the information gathered about pupils – specifically about pupils with special needs – is strictly private, pertaining only to pupils and their families. It is therefore crucial to follow ethical standards safeguarding sensitive private information and share all necessary information about the teaching-learning process with parents, as reported by some of the research teams (O, S, SM, T).

## Summary

This chapter focuses on the attention – the human-professional capacity for holistic and empathetic observation of the single pupil in his or her context. Summing up, according to information from the research teams, gathering knowledge about individual pupils either a) focus on pupils with some

kind of special educational needs, or b) on all individual pupils in the class, including those who have special needs. While cooperation between ordinary teachers and special needs educators is central, it varies. In the majority of studies, special needs educators have the role of advisors or counsellors, even though the proximity of their contact with teachers as well as parents varies (B, L, O, S, SM, T, Z). In some of the studies special needs educators also teach pupils with special needs (S, T). In the Ljubljana case in particular, special needs educators are expected to teach special classes for young people who are functionally deaf or hard of hearing, whereas they are advisors in ordinary classes where pupils with the same special needs are in the class (L<sup>46</sup>). One assumption from the study is that focusing on getting to know a pupil depends upon a school's – that is, teachers', school administrators' and special needs educators' – attitudes, attention and assessment as well as having sufficient time to do it. How does this many-faceted knowledge support making individually adapted and meaningful teaching and learning in the community of the class? This question is followed up in the presentation of the six other didactic-curricular aspects of schools' internal activities. As reported, assessment is fundamentally important for gathering knowledge about a pupil's level of mastery and need for further support in the learning process. Together with teachers, special needs educators play an important role in this task. Educational assessment is one of the main components of the educational and special needs educational professions. The next chapter describes the reported findings on assessment.

### 3 Assessment

What is assessment in an educational context? This study applies the following preconception:

To assess and evaluate is to gather, interpret and reflect on a variety of information in order to adjust the direction towards a future goal. Educational assessment and evaluation consist of considerations and judgements about teaching and learning environments, processes and results, and about their contextual relations. Special

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46 The situation of pre-lingual deaf children has radically changed due to the development of cochlea implants. Accordingly, the education of special needs educators for persons who are deaf or hard of hearing has also changed in the years after the study presented here, as the Ljubljana team report. Similar developments have taken place in other participating countries.

needs educational assessment and evaluation draw attention to specific possibilities, barriers and adaptations concerning teaching and learning environments, processes and results, and their contextual relations (Johnsen, 2014b).

Accordingly, assessment focuses on the learning process, level of mastery and need for educational support of every single pupil as well as the whole class. Similarly, it focuses on whether and how educational intentions, content, methods, class organisation, communication and care as well as contextual factors contribute to meaningful learning – or function as barriers to the learning processes. It may also identify and describe possible dilemmas between special needs educational practices and traditionally applied practices. Hence, this report concerning different kinds of assessment is structured in accordance with a set of preconceived aspects of assessment as part of educational inclusion as well as traditions, ideas and research about teaching-learning processes (Daniels, 2014a; 2014b; Ivić, 2014; Johnsen, 2007; 2013; 2014 a; 2014b; Vygotsky, 1978).

The professional knowledge bank of ordinary- and special needs education stores a multitude of assessment approaches and -tools. Some of these are assumed to promote individually adapted teaching and learning, others not. Accordingly, the focus of this international comparative research project is to describe assessment practices and their relation to the policy of inclusion. Who and what are assessed? Who assesses? What kinds of assessment approaches and methods are used – how are they used and why? Concrete tests and other assessment tools are documented in individual articles from the research teams. In this article, the descriptions are limited to findings on more general level, based on the information found, analysed and presented by the research groups. In some of the research groups, teams directly implement assessments, mainly related to selected learners as part of action research implementation, while other research groups limit the study to information gathering. Unlike the grounded or open exploration of schools' knowledge about their pupils, the inquiry of assessment is based on the following predetermined categories:

- Examples of assessment approaches and tools applied individually
- Examples of approaches and tools applied in class- and group assessment
- Who assesses?
- Who is assessed?
- What is assessed and how is it applied?
- Assessment of curricula
- Dilemmas
- Summary

## Examples of assessment approaches and tools applied individually

The Zagreb team argues:

The most important thing for a good assessment is to develop an individual approach to teaching and supporting children. The educational intention should focus on every child's achievements based on acceptance and support of diversity in accordance with contextual factors (Z).

Concerning direct information gathering about individual pupils' level of mastery in different areas and school subjects, *speaking with the individual pupil* is reported to be a frequently used approach – from everyday talks to more focused and systematic dialogues and interviews. In all cases, single pupils' *schoolwork* is examined. *Portfolios* of learning tasks are systematically gathered and assessed (SM). *Weekly curricula* are examined either for all individual pupils (O) or only those with special needs. Some teams find that schools perform *self-evaluation* as part of the overall assessment. Specific *achievement tests and ability tests* are applied and followed up by some research teams<sup>47</sup>. These are, as a rule, based on diagnostic tests of specific impairments and often implemented by external interdisciplinary expert teams. As documented in the individual team presentations, the research groups in Sarajevo, Tuzla and Zagreb implement and follow up pupils with specific challenges, disabilities and special needs with comprehensive and targeted ability tests. The research groups also focus on *teachers' self-evaluation*. Questions are asked about assessing individual pupils, reasons for different kinds of assessments and how they are related to further educational support. In the cases where teachers use *logbooks*, as they do in Norway and Macedonia, they are interviewed about how they are used for assessment purposes and followed up in observations. Thus, assessment of individual pupils and of how and why teachers and special needs educators select their assessment tools are in focus. So are issues regarding how assessment is related to developing further educational goals in the individual pupil's teaching-learning process.

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47 Detailed information about the use of individual tests and other assessments are found in the research teams' articles in Johnsen (2013; 2014) and in this anthology.

## Examples of approaches and tools applied in class- and group assessment

Tests are typical class assessment tools; *class tests* in all kinds of subjects, *school tests*, *national* and *international tests*. The great majority of tests are informal and frequently repeated, such as the English glossary tests given every Friday in grade six (O). In some cases school beginning tests are used in order to screen pupils' level of mastery in certain subjects at the beginning of autumn semester (O, S), for example arithmetic. Formalised screening tests are used for school beginners for information about their wellbeing at school (O). However, tests are not the only assessment tools. Similar to individual assessment, *checklists*, *observations*, *drawings*, *pupils' works*, and *logbooks* or diaries are also used in the assessment of entire classes or groups. As may be seen, the types of assessment tools used for classes and individual pupils contain many similarities. Class tests are often graded using scales that are usually norm referenced, that is, where the single pupil's results are compared with those of the class. A grade gives only a superficial impression of mastery. However, a teacher may look beyond the grade to what has actually been mastered and where the learning barriers are – and consequently, what kind of support the pupil needs in order to take a step further in the learning process (Johnsen, 2014b). In practice, a lot of detailed information about a pupil's concrete level of mastery comes from their answers on class assessments.

### Who assess?

Class- or subject teachers administer class- and subject assessments. However, other professions both inside and outside of the school also administer and interpret assessments. Thus, 1) one of the case schools has special needs educators employed during the project period (S); 2) another case consists of regular and special classes that have employed special needs educators either as teachers or advisers (L); 3) the class teacher has additional education in aspects of special needs education (O); 4) the case school, being a regular school, is supported by a school with several years' experience in special needs education and inclusion (B); 5) the school has special needs educational support (Z). In all seven cases, special needs educators and -researchers have participated in the study, and, as mentioned above, they take a direct part in assessment in some of the schools (S, SM, T, Z).

External special needs educators and expert teams assess special educational needs and disabilities in all participating countries on either the municipal-, district- or national level. This has consisted of either a mainly educational-psychological counselling centre (EPC) (O) or more cross-professional teams, including medical professions (B, L, O, S, SM, T, Z). Other external institutions also offer special needs educational support. In some of the countries, special schools or centres are authorised supporters. In other countries, such as Norway, there is a network of national and regional resource centres – Statped (<http://www.statped.no/>) – specialising in different kinds of disabilities and special educational needs. Their task is to support schools and educational-psychological service with updated knowledge. Research within different areas of special needs education and inclusion takes place at universities in all participating countries – sometimes as cross-disciplinary studies, such as special needs education and medicine, or as special needs- and ordinary education, etc. Thus, assessment and evaluation take place on all these levels; school level, external special-needs educational level and research level. Still, the local school and class teacher seem to be the most central stakeholders when it comes to assessment within the participating studies. Cooperation between regular teachers, special needs educators and researchers take place, either with externally employed special needs educators or internal special needs educators employed on a temporary project basis. During the research period, none of the case schools has sustainable internal employment of certified special educators.

## Who are assessed?

So far, the class and individual pupils have been at the centre of the assessment discussions.

However, according to the main research question, a) how does school teach in accordance with pupils' different levels of mastery and needs for support in the learning process (recourses, barriers and dilemmas)? And b) the description of assessment above; attention turns towards the teaching-learning participants at school: Do teachers assess their own teaching in other ways than through pupil assessments? It seems that in the seven studies, teaching plan revisions are mainly based on pupil assessments. Individual assessments are mainly focused on pupils with different special educational needs; they are versatile, thorough and comprehensive. However, the Macedonian research team reports:

We also assessed the level of success in the instruction performed by the different teachers. Initial assessments of the teaching process informed us that regular mainstream teachers lacked knowledge regarding the educational process of a child with a cochlear implant. As this was an action research project, we had two workshops with teachers during which we suggested strategies for working with this pupil. Our next video observations showed us that the teachers implemented these instructions in their everyday work and increased their level of success during the teaching process. In this way, they managed to meet the pupil's level of mastery (SM).

This is an example of active assessment of teachers' knowledge and ability to teach in accordance with a pupil's individual educational needs. In this research project, teachers' work is evaluated in all classroom studies in accordance with the main research question. Thus, teaching is described in relation to the a) curriculum or teaching plan; b) variety and relevance of assessment procedures; c) pupils' process of learning and mastery; d) ability to focus on the single pupil's learning process and need for educational support; and e) ability to create and maintain a psychosocial and educational inclusive class celebrating diversity. As mentioned, six of the studies focus on pupils with special needs, whereas the Norwegian study focuses on how all the pupils in a case study class are assessed on both an individual and class basis (O).

## What is assessed and how is it applied?

Assessment has already been divided into whether it focuses on individual pupils or classes and groups. As mentioned, when it comes to class assessment, there is a long tradition for using so-called norm-referenced assessment or tests of all kinds, from class tests in different school subjects to standardized national and international tests. These tests' common denominator is that they are designed to compare and rank pupils in relation to others. As also indicated, this kind of ranking is not sufficient when it comes to following up single pupils' learning progress as an important part of individually adapted education in diverse pupil groups. Does this mean that these assessment traditions and tests should be abolished and new assessment procedures invented? What about all the classroom tests? It may well be that some tests would be better avoided. However, a provisional answer may be that it depends upon how the teacher and special needs educator together apply the results of a class test. Do they only look at the grades? Or, do they, as mentioned, analyse details of the pupil's answers in order to find more exact indicators about level of mastery, next probable learning steps and overall need for support? Do the seven studies provide answers to these questions?

The summary of class assessments above suggests variation in use, where some of the class assessments are expected to serve as screening tests – possibly followed up by individual assessments.

While a main purpose of assessment is to follow up the concrete teaching-learning process, it may also serve as documentation and argumentation for providing necessary extra resources to a class. This is formalised in the Norwegian system, as indicated in the following example from the longitudinal study.

One of the pupils has reading difficulties. In cooperation with parents, the school applies for additional resources in order to be able to give him more efficient support. The application procedure is as follows: 1) The school prepares a holistic assessment of the pupil's level of mastery, showing high level mastery in arithmetic and other subjects and slow progression in reading acquisition, indicating dyslectic problems. The application is delivered to the municipality's educational-psychological service office (EPC). 2) This is followed up by further assessments and concludes by recommending additional special needs educational resources to the municipality education office. 3) The education office then allocates additional resources (O).

In this process all assessment approaches are used, including information from the teacher's logbook, analysis of weekly plans and the pupil's school work as well as relevant class tests, talks with the pupil and – what is mandatory – dialogue with parents along with their written consent to apply for support from EPC. Thus, in this case, the traditional process of assessment of the teaching-learning situation for a pupil with possible special educational needs is followed. Does this combination of internal and external assessment contribute to increased possibilities for individually adapted support and inclusive practices? In this case, it is fair to say that it did. However, the majority of special units and -schools in several Norwegian municipalities indicate that assessment procedures such as these lead in many cases to pupils' segregation instead of participation in an inclusive class (O).

Another example is taken from the report of the Zagreb team, where a group of professionals develops a proposal for a teaching model based on pedagogical and special needs educational assessment. The assessment results in a) an accommodated programme with decreased content and special needs educational approach; b) individualisation of activities with an emphasis on the importance of adapting methods, means and actions; and c) a special programme for children with multiple difficulties. The Zagreb team also notes that during the transition from preschool, assessment material is handed over from their special professional team to the school (Z).

## Assessment of curricula

As indicated above, when teachers are assessed or assess their work, their curriculum plan and -implementation are usually important topics that receive attention. This research project focuses on the relationship between 1) the curriculum and 2) pupils' individual teaching-learning process 3) in the community of the class, since this threefold relationship constitutes main aspects of educational inclusion. More specifically, attention is paid to whether and how educational intentions, content, methods, class organisation, communication and care as well as contextual factors – or some of these aspects either contribute to meaningful learning or are barriers in the learning processes. What kind of curriculum plan and practice is at stake here? The starting point is the school's curricula from the short-term and everyday perspective. According to some of the research teams, weekly and even daily plans are revised and practiced (O, SM, Z). The Macedonian team, which follows up the teachers' curriculum revision in detail, finds that "... only very small adaptations from the regular class curriculum are necessary for their case pupil. These are mainly related to task differentiation and increased use of written messages in order to clarify communication of instructions ...” (SM). Generally, it seems that adaptations and revisions of curricula for individual pupils are mostly based on informal observations and other assessments through examining the pupil's assignments and presentations during direct individual support of this pupil. The teacher may decide that there is a need for further repetition, going back one step or using other means of explanation. The teacher may also decide that the time has come to move faster forward in the teaching-learning process. These adaptations probably take place in a combination of systematic professional considerations based on the abovementioned assessments, often in combination with personal-professional intuition and tacit responses on behalf of the teacher or special needs educator. In long-term revisions of class- and individual curricula, teachers and special needs educators make use of their entire range of class- and individual assessments of the teaching-learning process; this revision is presented and discussed with the pupils' parents (O, S, T, SM, Z). The seven studies indicate that the case schools' everyday revisions, assessment of individual- and class curricula and even long-term curricula are directed towards individual adaptation of teaching and learning processes within the community of the class. How, then, is the described assessment practices internally in the schools related to national curriculum in the participating countries? The question is addressed in the next chapter, which discusses educational intentions.

## Dilemmas

Assessment and evaluation may reveal dilemmas between special needs educational practices, inclusive practices and traditionally applied practices. Likewise, assessment of assessment (meta-studies) may reveal dilemmas and barriers within actual assessment practices. Are such dilemmas discovered and discussed in the seven studies of this research project? Several dilemmas are discussed in the following, some of them with reference to findings, others with only vague connections to this research project. The following topics are addressed; a) the dilemma between local school curricula and national curricula; b) the classical dilemma between assessments and the danger of negative labelling; c) dilemmas related to choice of perspective or direction with respect to assessment tools and -cultures; d) and the problem of whether and how the organisation of assessments affects the way schools teach.

**Dilemma A.** Several of the participating teams draw attention to a possible dilemma between individual curricula, local school curricula, national curricula and international tests. The Sarajevo team articulates this in following:

National curriculum is followed, being mandatory in a 70% share while the remaining 30% allows for teachers' flexibility. Observations show that while teachers in both schools (participating in the study) stick to the national curriculum and plan using the traditional approach in separate subjects, in daily planning they make individual plans for children with special needs based on their potential and challenges ... (S)

Along with comments from other research teams, this description indicates a possible dilemma between teaching demands in national curricula and adaptation of the teaching-learning process to the level of mastery of every pupil in diverse classrooms. Internationally, obligatory national curricula having narrow and strict content represent a serious challenge to being able to adapt a curriculum for individual pupils, whether this is due to pupils having either an exceptionally high level of mastery or problems meeting the requirements in some or all areas. The Nordic national curricula, such as found in Norway, are flexible, since they are constructed as framework plans that allow variations as well as exceptions to general annual mastery norms. As a result, no Norwegian pupil repeats a grade, and everybody has the right to move from the lower secondary to upper secondary level (Education Act, 1999). Still, this does not mean that all inequalities have been abolished in the Norwegian educational system. In spite of the rights of all pupils to education in accordance with their

individual level of mastery and capabilities throughout elementary-, lower- and upper secondary school, a gap between official rights and actual practice has been revealed in several studies (Johnsen, 2014d). Consequently, there is reason to believe that a number of pupils move up the school system with hidden difficulties because not enough attention has been paid to assessing their individual educational needs (O).

The participating teams report that the principle of inclusion has been incorporated in their educational laws and policy papers. However, changes in other paragraphs needed in order to carry out inclusive practices may not have been made. Nonetheless, the Zagreb team reports that the new Primary School Act (2008) creates the possibility for acknowledging pupils with special educational needs by defining Croatian national educational standards for assessment, individualisation and adaptation in accordance with children's special needs (Z).

Since public interest in inclusion and disability rights peaked in the 1990s, there has been an international trend towards competition with regard to pupils' achievements during recent decades, with a strong emphasis on assessment programmes such as the *Programme for International Student Assessment* (<http://www.pisa.no/>) and a number of similar international competitions. The media have a great responsibility for the growing mind-set surrounding "Educational Olympics". Meanwhile, inclusion is fading into the shadow of this new educational discourse. For example, in Norwegian teacher education, courses in education and special needs education have been decreased in favour of increased time for the so-called main subjects of mathematics, first language and English.

**Dilemma B** is a classical dilemma related to the importance of thoroughly assessing pupils' level of mastery and need for educational support; specifically, this concerns pupils with special educational needs and disabilities – and the danger of negatively labelling these same pupils. Being labelled and categorised into a difficulty- or disability group may have negative effects on both the pupil's self-esteem and other pupils' attitudes towards them (Johnsen, 2014b). All the research teams have been aware of this dilemma. In the Norwegian case the class teacher raises this concern and also recognises this concern among parents. The concern is echoed in other studies; thus, sensitive planning for every pupil in all contexts is required (B, L, O, S, SM, T, Z).

**Dilemma C** relates to the choice of perspective and use of specific assessment tools or approaches as well as the overall assessment culture. Is there too much

or too little emphasis on assessment? Is too much time spent on assessing and consequently less time on teaching? What is the aim of assessing a pupil with special needs: a) is it in order to consider placement in a special unit or special school? or b) Is it to facilitate high-quality education within the framework of a regular school and class? In this cooperative research project, three of the research teams implement extensive assessments of focus pupils with special needs in their action research studies. However, their goals are to establish levels of mastery, specific educational needs and levels of educational progress as well as success rates of inclusion. Their extensive assessments are proportional to the educational measures taken and the results found and are thus helpful in facilitating increased quality of education within the framework of the selected regular schools and classes (S, SM, T).

**Dilemma D.** Does the way assessment is organised affect how schools teach? For example, do schools and classes plan their teaching in order to get high scores on national or international tests such as PISA? This is a hotly debated topic. Or, does the principle of inclusion stated in laws and policies direct assessment policies in schools and classes? In this research cooperation project the principle of inclusion has guided the organisation of assessment – especially in the action research studies, whereas it has guided critical explorations in the remaining studies (B, L, O, S, SM, T, Z). This is so, even in the study that has critically examined whether pupils with hearing disabilities felt more included in regular classes or in special classes (L).

## Summary

Assessment of mastery levels and proximal developmental steps is a prerequisite for relevant teaching. This is of specific importance for pupils who have special educational needs, since what is special is often implicit, hidden or unexplored. Consequently, systematic development of sophisticated assessment tools is an important part of special educational research. However, it is important not to “get lost in assessments”; on the contrary, the primary task of special needs education is to examine the set of learning strategies that function for a pupil in order to find matching teaching approaches. Hence, a number of informal assessment procedures along with more systematic tests are of great importance. Findings concerning the following aspects of assessment are therefore gathered from the seven studies’ reports:

Assessment approaches and tools applied for individual pupils:

- formal and informal talks with the pupil
- examination of school work
- examination of portfolios of learning tasks
- examination of the pupils' weekly curriculum
- individual achievement and ability tests
- the pupil's self-evaluation
- talks with the parents and other teachers
- teacher's self-evaluation
- special needs educators' evaluation of individual curriculum and the pupil's progress

Assessment approaches and tools applied in class- and group assessment:

- Class tests – school tests – national tests – international tests
- Check lists
- Observations
- Pupil assignments
- Pupils' logbooks
- Teacher's logbook and class curriculum

Who assesses?

- Class teacher
- Subject teacher
- Special needs educator
- Educational-psychological service and other external services

Who is assessed?

- All pupils in the class or classes in the same age group
- Individual pupils with special educational needs
- Class teachers' work and the learning progress of pupils with special educational needs

Four dilemmas or challenges are discussed, whereof some refer to the question of what is assessed. The four dilemmas are:

- a) dilemma between individual curricula, local school curricula, national curricula and international tests
- b) dilemma between assessments and the danger of negative labelling

- c) dilemma related to choice of perspective or direction when it comes to assessment tools and -cultures
- d) the problem of whether and how the organisation of assessments affects the way schools teach.

Assessment is possibly the one element of special needs education that is the most criticised. Much of the criticism concerns negative labelling, discussed as dilemma B above. Another type of criticism is that assessment, more specifically special educational assessment, takes up a great deal of time in professional practice, possibly at the expense of the time and skills necessary for special needs educational teaching together with ordinary teaching and, consequently, on developing inclusion. When it comes to this cooperative research project, overall, it seems that the assessment procedures explored and implemented in the seven studies, even though different, aim at increasing inclusive practices. This is not surprising, since educational inclusion is a main topic, and consequently, emphasis on exploring the development of inclusion in the selection of participating schools as well as research design – which is either action research or “good cases”. The question about how assessment is applied is a recurring theme in this report. Accordingly, the question leading to the next chapter is on how schools gather information – informally as well as through assessment procedures – about single pupils in the community of the class – are connected to the continuous “spiral process” of developing individual educational intentions for the diversity of educational needs in the class for all.

## 4 Educational intentions

Institutionalised education in schools is, as a rule, built on intentions described in education acts and other policy documents. An important part of educators’ professional work is to transfer general intentions into concrete and manageable goals through adapting them to pupils’ capacity and needs for teaching support. Society has a need to hand over traditions to new generations, helping them to become responsible adult citizens and develop new knowledge and skills for the future. Educational aims and goals in national acts reflect this need. However, pupils have their own more or less clear-cut personal aims and preferences, distant future dreams and concrete, immediate objectives. In the intersection between societal and individual interests, educational intentions may be characterised as the educational what and why – sharing this char-

acteristic with teaching-learning content. Selecting teaching-learning goals and objectives in an individual curriculum is therefore reasonably based on three components:

- Aims and goals stated in education acts and other official documents
- Individual aims and goals
- Assessment of the learner's knowledge, skills and learning potential (in accordance with Lev Vygotsky's "zone of proximal development" discussed in Chaiklin, 2003; Davydov, 1995; Hedegaard, 2005; Ivić, 2014; Johnsen, 2014b; 2014c; Wertsch, 1984; Wertsch & Tulviste, 2005).

In view of the above, the question about how the schools in this research project are able to develop concrete inclusive teaching- and learning goals may be rephrased as follows: How does a school's knowledge about official aims together with the single pupil's learning potential and goals contribute to the development of concrete, manageable, individual teaching-learning goals in the community of the class?

The participating research teams focus on describing and explaining connections and differences between short- and long-term goals, including even goals from a lifelong perspective. The Zagreb team points out that individualisation as an educational approach is defined by their country's National Strategy (2007), National Plan (2006), Law on Primary and Secondary School Education (2008) and Croatian National Educational Standards (2007), (Z). As pointed out above, all research teams state that the principle of inclusion is affirmed in national policy papers and educational acts, although in different ways and levels of thoroughness, it would seem. Based on this situation, the follow-up question is whether and how this principle is realised in school practice. The Sarajevo team describes its findings in the following way:

While general goals for education and socialization are determined annually, weekly objectives exist only for pupils with special needs. These short-term objectives do not have any official form, but are merely found in teachers' internal notes ... (S).

Focusing on their case pupil, the Skopje team members report that the individual goals for the pupil with cochlear implant are within the frames of the national curriculum. Although these have certain modifications, they have been adapted to his individual needs. The team also describes the general relationship between inclusion, individual educational plans and the development of educational goals in Macedonia:

The concept of inclusion means education for all. This underlines the making of an IEP [... individual educational plan ...] in the framework of the national curriculum. In our country, this is defined in the Handbook for Inclusion of Children with Special Needs in Regular Schools in the Republic of Macedonia. This Handbook is used as basic literature for ordinary teachers in all schools moving towards inclusion, but is not recognized as an official document directly connected to educational acts (SM).

The long-term IEP contains the following parts: i) the nature of the problem, and ii) school activities (resources, specific activities, *goals*, parental support, need for medical assistance and all previous reports on the pupil). Long-term goals are specified according to impairment and special educational need. Thus, while the Macedonian “case pupil’s” daily planning includes multifaceted teaching strategies, it is within the frameworks of the regular curriculum and according to the pupil’s abilities. Educational goals – from annual- and semester- to short-term goals are continuously revised in dialogue with the pupil. His communication is an important factor in establishing social interaction. Since he is talented in maths and art, his future aims are oriented towards architecture as a lifelong goal (SM).

Another example is from the Norwegian case school. How do class teachers manage to coordinate official principles and individual educational needs – the top-down and bottom-up perspectives? From a top-down perspective, all major revisions of national official documents are carefully implemented at local schools. In the case school’s district, this is done by appointing groups of teachers across neighbouring schools in order to adapt each school subject to the local schools. Thus, during the research period teachers from the case school participate in incorporating and adapting the latest revised national curriculum for school subjects, the so-called *Knowledge Promotion* document (Kunnskapsløftet, 2006) From a bottom-up perspective teachers supporting individual pupils may have very concrete long-term and short-term goals written in weekly plans in addition to daily goals. Two cases may exemplify their practice: a) For one pupil a concrete main goal has been a step-by-step process to help develop his concentration and increase his persistence with regard to learning tasks. b) a small group receiving special support with additional reading acquisition has as a concrete goal to teach one of the pupils to i) divide compound words, ii) find out which words they are constructed of, iii) understand the logic of compound words and iv) learn a strategy to read them (O). How are these bottom-up goals connected to the top-down national framework curriculum? The two examples are situated well within the national curriculum, which is

characterised as a frame curriculum at the same time as additional special needs educational resources are required. Thus, the two examples meet conditions for individually adapted special needs education. However, whether they may also be seen as inclusive depends upon how the goals are realised within the context of the class and school.

Educational intentions are traditionally related to developing *knowledge, skills* and *attitudes*. In addition, the category entitled *access to experiences* is also central to special education and inclusion (Johnsen, 2014b), as it is an important aspect of education towards achieving a democratic and inclusive society. A class may serve as a melting pot when pupils get opportunities to share their experiences and interests. When the Norwegian case class works with the multiple intelligences mentioned above, pupils have the opportunity to tell the class about themselves and their mates. Some are interested in horses; others play drums in a band or sing in a choir. They appreciate each other and learn (O). However, some experiences may be unrealizable for pupils with specific impairments unless special measures are taken to ensure access. For instance, touchable art has been developed for people with visual impairment, music is played so that people with hearing impairments may feel its vibrations, and mobility is required in art centres, theatres and athletic stadiums. Creating access to experiences is an important goal for the inclusive school. Findings in the seven studies add a fifth category, namely *psychosocial wellbeing and development*. Whether explicitly or implicitly, studies point to the importance of being aware of pupils' wellbeing – specifically pupils with special educational needs (B, L, O, MS, S, T, Z). In the Norwegian study psychosocial wellbeing is highlighted as the most important and fundamental area of intention: “Without a focus on wellbeing, focus on academic areas such as knowledge and skills may be wasted” (O). This great emphasis manifests the importance of the aspects of communication and care found in the Curricular Relation Approach and applied in this cooperative research project.

As referred to above, educational intentions or goals may be divided into concrete short-term and more general long-term goals, including even goals from a lifelong perspective, as briefly mentioned by the Skopje team. The Belgrade team also points at life-long intentions and results, and they attach great importance to children's psychosocial development. Thus, even though they have doubts when it comes to academic success for all children in an inclusive class having currently available resources, their findings are positive when it comes to psychosocial development of all pupils in classes with diversity among

pupils, as is the case in inclusive classes. According to teachers and principals, inclusive classes better enable pupils with special educational needs to develop social and communicative skills than special education provisions. They also point out that nondisabled pupils' socio-emotional development is positively affected, promoting their tendency to embrace empathic responses and altruistic values. In their words: "Children learn to respect differences and that every human being is of equal worth" (B). Psychosocial wellbeing and development is thus an important area for educational intentions.

## Dilemmas and barriers

A main dilemma when it comes to developing educational intentions on all levels has already been touched upon; namely, possible contradictions between national policies and local – especially individual – teaching-learning goals. For pupils with special educational needs – whether due to performance far above or below or parallel to academic requirements – the possibility of offering individually adapted curricula depends on a number of factors; a) strictness or flexibility of national intentions and curriculum; b) additional resources in order to realise specific educational measures; c) whether teachers have a sufficient sensitivity to discover special educational needs and d) if teachers and special needs educators have a sufficient overview of the interrelationship between assessment procedures and results and educational intentions, content, methods and organisation and other key aspects that need to be addressed in order to create individually adapted teaching-learning processes in inclusive classes. Thus, dilemmas concerning the development of individual educational goals are interrelated with similar dilemmas encountered for assessments.

When it comes to individual and special needs educational goals, they may, however, prove to be inefficient as educational tools. A common mistake is to formulate all too general goals without breaking them down in a step-by-step development of concrete and realistic objectives. This is because having too general objectives may prove to be barriers instead of educational tools, as has been observed in a number of Norwegian individual plans. Since this pitfall has not been found in the seven participating studies, the reason may be that the research teams have focused on so-called "good cases" and that in many of the cases, special needs researchers with sufficient skills participate in action research cases.

## Summary

Summing up with a question: How does a school's knowledge about official aims together with the single pupil's learning potential and goals contribute to the continuous development of concrete, manageable, individual teaching-learning goals in the community of the class? Findings indicate that the special educational needs of pupils participating in the case schools are found via detailed assessments and followed up by relevant educational objectives. However, the relationship between aims and goals in official curricula and concrete step-by-step goals in educational practice is not clear in all cases. The following aspects leading to possible dilemmas or challenges are pointed out:

- a) strictness or flexibility of the national intentions and curriculum
- b) additional resources in order to realise specific educational measures
- c) whether teachers and special needs educators have enough professional knowledge and skills related to individualisation and inclusion
- d) whether they have a sufficient sensitivity to discover special educational needs
- e) if teachers and special needs educators have a sufficient overview of the interrelationship between assessment procedures and results and educational intentions, content, methods, class organisation and other didactic-curricular main areas.

## 5 Educational content

As indicated above, there is a close relationship between educational intentions and content. When taken together, these two key aspects are expected to answer questions concerning **what** a particular education or teaching-learning process is about. Educational content may be understood as substance and values that are supposed to form the pupil into an educated person. The German concept of *Bildung* is also used in English texts in order to cover this classical foundation of education. What is meant by 'an educated person', and how does this relate to educational content? The German scholar, Wolfgang Klafki (1999:148), answers these questions in the following way:

... , that a double relativity constitutes the very essence of contents of education, in other words their substance and values. What constitutes content of education, or wherein its substance and values lie, can, first, be ascertained only with reference to the particular children and adolescents who are to be educated and, second, with a particular human, historical situation in mind, with its attendant past and the anticipated future.

In what has become a classical didactic text in Norway, scholars Bjørndal and Lieberg (1978) also emphasize the relational nature of educational content when they highlight socio-cultural and pupil-centred as well as qualitative and quantitative dimensions as the four main criteria for selecting educational content. Similarities and differences between cultures is likewise a central question in Alexander's cross-continental comparative pedagogic study (2000: chapter 11). The abovementioned texts explore how contextual aspects contribute to selection of educational content from different angles, and is in line with the perspective drawn up in this project. But, who are "the particular children and adolescents" when it comes to deciding educational content? The educational texts mentioned above seem to expand the focus on "pupil-centeredness" to groups of pupils, such as classes and age levels (Johnsen, 2014b). Is this focus sufficient to develop inclusive educational practices? Inclusion is based on schools' ability to meet the diversity of individual educational needs in the classroom, whereas, as indicated above, ordinary educational traditions have mainly focused on the school-class as one entity. Hence, special needs education with its regard for the individual pupil is a necessary contributor to developing inclusive practices. Special needs educational tradition moving towards inclusion increases the basis for selection of educational content to apply to each single pupil in the community of the class, as indicated in the didactic-curricular relation approach. There is a huge – almost infinite – amount of possible content that may be used in the teaching-learning process in order to represent "the very essence of contents of education, in other words their substance and values" (Klafki, 1999:148), from the tiniest details to the largest programmes. However, only a few examples are presented here as illustrations of educational content, thus dividing the chapter as follows:

- Examples from the studies
- Dilemmas and challenges
- Summary

## Examples from the seven studies

Having the diversity of pupils in mind, how do schools select educational content so that all pupils are able to participate in a meaningful teaching-learning process? The Belgrade team asks participating teachers what kinds of adjustments to the curriculum they practice. Concerning educational

content, they focus on two kinds; a) development and implementation of individualised curriculum in cooperation with school psychologists and special educators from a supporting special school; b) reduced demands when it comes to educational content in certain subjects in accordance with pupils' abilities (B).

The Sarajevo team argues that the level of achievement of the pupils involved in the project is different depending on their mental and physical difficulties. The pupils that are specifically focused on in this study have speech and language impairments. Some of them also have extensive difficulties with respect to reading and writing comprehension. Hence their teachers apply additional didactic material and approaches for their appropriation of these subjects. For example, they mention specific material such as picture books, puzzles and jigsaw puzzles. Specific approaches are implemented in accordance with individual special needs, including speech fluency, dyslexia, bilingualism and dysgraphia. There is a direct relationship between the kind of additional didactic material used and assessment of the individual pupil (S).

The Tuzla team supports teachers with additional material and approaches based on detailed assessments of mastery levels for pupils with different learning difficulties (T)

As mentioned, educational content may be understood as substance and values. Values may appear as attitudes, for instance attitudes to inclusion, respect for diversity, tolerance and acceptance – also acceptance of children with psychosocial difficulties, as in the case of the Zagreb study. Cooperation between teacher, assistant and consulting special needs educator results in introduction of content that supports values, attitudes and communication skills that are added and further developed in order to increase mutual respect and positive attitudes between pupil and class (Z).

The Macedonian national curriculum allows three levels of educational content selection within its framework; one level for gifted pupils, another for average pupils and a third level for pupils with disabilities. As mentioned, the case pupil of the Skopje team benefits from some individually adapted additional material in his first language and communication approaches due to his hard of hearing. Otherwise, he is expected to learn in accordance with the same educational content as the entire class with one exception:

In this particular case, the pupil gets individually applied material with math tasks on a higher level than the rest of the class because of his extraordinary knowledge in the field of the math subject (SM).

Similarly, the Norwegian case class provides additional content in mathematics for three of the pupils who show an excellent understanding of and eagerness for arithmetic. Additional material from the grade above is added to the obligatory class tasks. On the other hand, the class teacher is aware of a girl that "... does not like arithmetic and does not believe that she can do it, but is good in all other subjects (O). The class teacher perceives this challenge as a psychosocial task combined with the need to follow up the arithmetic content. She is also aware of other pupils who need psychosocial support for different and – in some cases – serious reasons. Psychosocial support, regulation and development therefore have a high priority in planning and implementing teaching (O). This priority directs her work towards the following aspects; a) the classroom as a holistic society in miniature b) relationship between academic and psychosocial content c) the relationship and cooperation with her colleagues, specifically cooperation with the principal d) communication with parents, and e) her and the school's information exchange and cooperation with other institutions such as educational-psychological service (EPC), child welfare service, Regional Centre for Child and Adolescent Mental Health (<http://www.r-bup.no/pages/about-rbup>), the national service for special needs education (<http://www.statped.no>) or other partners (O).

Are the schools able to select and make use of educational content that meets a variety of different levels of mastery and, at the same time, contributes to a holistic teaching and learning process? This is a question about inclusion related to psychosocial and academic sensitivity when selecting subject content. Two examples may serve as illustrations of efforts made in this area.

**Morning activities.** Two kinds of morning activities are observed in a case class. The first one is related to the class teacher's intention to calm the pupils down after weekends, which are often full of activities and late evenings. Therefore, after shaking hands with every pupil and exchanging words of greeting, the teacher plays a quiet piece of music. The pupils may lie down on their desk or look at a book of their own choosing. Those who prefer to have something to read choose texts at their own level of mastery. Every single pupil relaxes. Nobody talks or tries to sabotage this quiet time. Everybody does something of their own choosing during this relaxing fellowship.

As years go by, new class teachers adopt this morning activity. The first activity of the day is now that the pupils find their seat, pick up reading material of their own choosing and read silently for ten minutes. When the teacher and researcher enter the classroom, everybody is reading. There is silence in the classroom.

Choices of texts vary from “Donald Duck” to homework to adult-level novels. The content of this morning activity now relates to reading practice. These morning activities accompany the class throughout their time at elementary school.

**Reading acquisition** is a main topic in all participating schools. Pupils start their schooling with different reading skills – some read fluently at school start, while others hardly recognise the first letter of their name; still other pupils learn to read in a new language. How do schools handle these different skill levels? Teaching reading acquisition is a combination of obligatory and individual tasks. Schools apply a selected set of ABCs and other beginning books. Individual letter symbols and sounds are taught and practiced along with other reading acquisition techniques. This instruction is obligatory. Thus, all pupils work with the same subject – reading acquisition and practice – using a combination of obligatory and individually adapted materials as well as approaches. It seems to be common practice in the participating schools to have a stock of additional reading and writing acquisition material; thus, teachers as well as special needs educators use a considerable amount of additional time in “hand crafting” individually adapted learning material.

Summing up, all participating studies describe the use of additional and alternative content in curricular adaptation for individual pupils and groups in the form of material or approaches related to substance and/or values, as pointed out by Klafki (1999).

## Dilemmas and challenges

One of the most typical dilemmas when it comes to adapting educational content to the level of individual pupil mastery is the abovementioned dependence on the national curriculum in each country. This dilemma is similar, but not necessarily the same as between national curricula and educational intentions. The degree of freedom and flexibility differs among the participating countries. The Sarajevo team describes this dependency in the following way:

The national educational plan is directly connected with local school curriculum. The local curriculum must include 70% of the national curriculum in its content. Compliance with this rule is observed in both schools involved in this project (S).

The Macedonian national curriculum operates with the three previously mentioned levels of flexibility, including a specific level for pupils with special educational needs (SM). The Croatian National Strategy and -Plan defines individu-

alisation as an educational approach (Z). In Norway, the principle of the school for all and the right for all children to get a meaningful education adapted to their own levels of mastery and capability was established by the Educational Act in 1975 and followed up in national curricula. The national curricula are therefore characterised as rather open and flexible when it comes to alternative educational content. Still, the flexibility does not incorporate all necessary aspects. It has therefore been necessary to operate with exceptions from the national curriculum in cases where a pupil has special educational needs documented by the EPS. Another exception concerns grading, since all pupils accompany their own age group and nobody gets a “failing” grade or is made to repeat a year. In order to solve the accompanying grading dilemma, pupils with documented special educational needs are offered a written statement of their level of mastery instead of grading. Over the years, the national curricula are repeatedly constricted, especially as regards educational content. Increasingly, more content at higher levels of mastery is obligatory; consequently, exceptions have to be made for increasing parts of educational content (O).

Why is Norwegian national curricula being constricted? Why do Bosnian teachers have to accept 70% of the content of the Bosnian national curriculum? Could it be because so-called national curricula for the school for all and inclusion are based on earlier regular school traditions, and that the principle of inclusion has not been fully incorporated? (Johnsen, 2015).

As mentioned, educational content described by Klafki (1999) as substance and values is supposed to form the pupil into an educated individual. Seen from an inclusive perspective, forming a person, or *Bildung*, contains more than traditional school subject content prescribed for each grade. What might the word “more” contain? It may be learning tasks, including basic language comprehension and -use through communication programmes with simple icons. In the video *Et samfunn for alle* (A Society for All; Bolsø, 1989), there is a boy who is attacked by a progressively degenerative disease that slowly deprives him of his physical and mental functions. In the movie he is profoundly hard of hearing and almost functionally blind, has problems with balance and is about to lose his short-term and long-term memory. So why is he still attending his regular class? The principal explains that the aim of his schooling is to meet with his peers in his school’s secure and caring environment. The academic content focuses on: a) repeating skills he still masters in order to preserve them as long as possible, b) care and being together with his mates (Meland/NFPU, 1987). Likewise, in his article *From the Exceptional to the Universal*, French professor of anthropol-

ogy Charles Gardou (2014) argues for inclusion through showing glimpses of profoundly and multiple disabled children and youth and their communication with their caregivers and friends. Together they demonstrate a strong and universal desire for life. Gardou argues that their needs are universal in the exceptionality caused by their disability – and the excluding mechanisms caused by their surrounding society. He also portrays their exceptionally formed or acquired universal *Bildung* to become educated persons. The abovementioned examples show “a possibly more than 70% need” for individually adapted special educational content in order to succeed with the individually adapted education for these individuals. Are regular schools and classes ready to take on this educational responsibility? There is an increasing number of good examples of this happening – at the same time as there are countless (some of them documented) examples of the opposite: ignorance and exclusion (Johnsen, 2014c).

## Summary

Do the findings in the seven studies and other referred literature point to “*the what*”, in other words, to examples of applied individually adapted content? While all the studies describe individually adapted content components, the examples used are different, indicating pupil as well as content diversity as regards substance and values, or academic and psychosocial aspects. The examples concern the following aspects:

- Development and use of material related to the training of specific skills or overcoming certain challenges
- Development and use of additional material for pupils a) needing repetition, or b) in need of additional challenges
- Focus on academic content or issues
- Focus on psychosocial issues
- Focus on combinations of academic and psychosocial issues

Several dilemmas and challenges related to material and approaches or substance and values are pointed out, such as a lack of suitable content and lack of upgraded, new approaches. As mentioned, all participating countries have signed the Salamanca Statement (UNESCO, 1994) on inclusion. This raises the question: Are regular schools and classes on the micro level ready to take on this educational responsibility? The question may be expanded upon and apply to other participants from micro to macro levels, including international discourse and action.

## 6 Educational methods and organisation

Similar to educational content, the choice of teaching methods and class organisation are also interrelated with educational intentions as well as with the study's other didactic-curricular main aspects. Within didactic and curricular theories, educational methods and class organisation are frequently characterised as the educational **how** (Gundem, 1991; Johnsen, 2014b). It is a theoretical didactic question whether methods and organisation should represent one or two main aspects. The reason why they are merged in this report is that there are exceptionally many grey zones between the two – a method may be realised in a certain kind of organisation. Similar comments may be made about grey zones between content and method. The loose borders between main aspects or -areas show the interrelatedness between different categories when using a holistic didactic-curricular approach. They also indicate that there is no one way of constructing the different main areas. This is in accordance with the combination of interrelatedness and flexibility that characterises the didactic-curricular relation approach; it mirrors in the use of the model. Methods and organisation are presented as two sub-categories as follows:

### Methods

- a) Educational methods in general
- b) Methods for the plurality of educational needs
- c) Step-by-step methodology
- d) Differentiation
- e) Differentiation and individual adaptation hand-in-hand

### Dilemmas and challenges

### Organisation

- a) Time perspective
- b) Organising group size
- c) Educational scenes or places
- d) Educational resources

### Dilemmas and challenges

### Summary

## Methods

How can educational methods or approaches support individually adapted education and inclusion? How can the phenomenon of educational method be described? In Vygotskian terms it may be considered as mediating tools in the teaching-learning process, adapting the pupil's apprenticeship within the zone of proximal development (Cole, 1996; Johnsen, 2014c; Vygotsky, 1978; Wertsch, 2007). In order to support individually adapted education, teaching methods need to be based on knowledge about the pupil's level of mastery and zone of proximal development. They must also be based on preferred learning strategies – and in order to support inclusion, a variety of methods need to be considered in view of all pupils' learning strategies in a class. It goes without saying that a teachers' tasks in the inclusive school are fundamentally changed and expanded upon compared to traditional homogenous classroom teaching. What kinds of methods are found in the seven studies of this research project? They are reported in the following categories: a) educational methods in general, b) methods for the plurality of educational needs, c) differentiation, d) individual adaptation, e) between differentiation and individual adaptation, and f) findings related to dilemmas and barriers.

### a: Educational methods in general

The research teams find that teachers use different teaching methods in accordance with the content of the curriculum or syllabus in different subjects. However, teaching often consists of a single teaching method and is directed towards the whole class – some call it class teaching or *Ex cathedra* teaching. They find that current teaching methods are mainly oral in the form of lectures. Yet they may in addition consist of i) illustrations and ii) explanations or iii) demonstrations, iv) inductive methods with focus on discovering, v) analysis, vi) or combined with writing on a black board (white board, lap top). Teachers generally expect pupils to take initiative in the learning process by listening and/or writing notes and making drawings. However, the Sarajevo team argues: "It is quite obvious that using a single teaching method is outdated, so a combination of different methods is used during the teaching-learning process" (S). The teams also report active use of dialogue in different variations as well as using role-play as an active part of the teaching-learning process. The term "scaffolding", taken from the culture-historical tradition (Rogoff, 1990; Sharpe, 2006; Shvarts & Bakker, 2019), is used in order to explain teaching-learning interaction (O, S,

SM, Z). Didactic-curricular traditions as well as current theories and research contribute to extending and deepening knowledge and reflections on the role of methods and organisation as parts of schools' mediation capacity (Johnsen, 2014c; Kozulin & Gindis, 2007; Vygotsky, 1978; 1987).

## **b: Methods for the plurality of educational needs**

The abovementioned methods are not only found applied in traditional whole class teaching, but also in teaching-learning interaction with smaller groups, pairs and individuals. Mediating and scaffolding that focus on the individual child go hand-in-hand with flexible use of methods and approaches. As mentioned in the chapter above, in some of the schools teachers, special needs educators and assistants create alternative teaching learning materials – not only for pupils who need more explanation and repetition than the majority of the class, but also for those who need extra challenges. When it comes to longitudinal studies, use of different methods as well as material and media observed to change over time. During the five years of the Norwegian case study, the teachers move from centering written messages and teaching around the blackboard to using laptops with a whiteboard and internet connection. Obligatory material as well as a lot of additional material is now available online. However, the electronic addition does not leave the handmade materials unused, but rather adds to the diversity of mediating tools (O). The Sarajevo team reports that systematic scaffolding is adapted to pupils' different levels of understanding according to Bloom's et al classical taxonomies (1956). New methods are tried out and applied, for instance those related to critical thinking and cooperative learning (S). How do teachers assess the daily level of mastery for each pupil? Based on a thorough long-term assessment of every pupil, class teachers use a combination of teaching and systematic assessment of the pupil's achievements. This is called "appraising teaching" (some call it "diagnostic teaching") (O, S). Furthermore, appraising teaching combined with systematic long-term assessment is applied by special needs educators, teachers and guided assistants in the teaching-learning process of pupils with special educational needs. The pupils with special needs that are receiving special focus in the studies benefit from all of this (S, SM, T, Z). The teams describe a flexible use of material and approaches adapted to specific support of single pupils in ordinary classes. Thus, for a pupil with hard of hearing illustrations and written texts are prioritised in a total communication approach. New approaches to

interaction are successfully tried out for pupils who struggle to pay attention and work with persistence. Educational methods combining different sensory abilities such as touch, vision and hearing are applied to pupils with attention difficulties (S, SM, Z). These examples illustrate the methodological diversity that is recognized in the seven studies.

### c: Step-by-step methodology

Step-by-step methodology is used in ordinary as well as special needs teaching. Special needs education has developed methods of breaking down learning tasks into small steps, systematic repetition and example variation. This is a didactic area where special needs education has made important contributions to providing ordinary and inclusive education. There are several examples of step-by-step teaching used by the participating schools.

The two concepts, differentiation and individual adaptation, are suitable for displaying two frequently discussed perspectives of ordinary- and special needs education and inclusion: namely, a top-down and a bottom-up perspective. Findings related to the two concepts are discussed separately in the following section.

### d: Differentiation

Differentiation may be seen to have a *top-down perspective* using whole class teaching as a starting point and differentiation for one or some pupils or groups. Differentiation deals with assigning different learning tasks to pupils with different proximal learning possibilities. To provide variation in learning content, assignments and the length of time spent on solving learning tasks are traditional ways of differentiating used in many ordinary schools. An example of this approach is to divide a class assignment into various length adapted to pupils' abilities. The term differentiation is also used about educational content, organisation and intentions. This illustrates how curricular phenomena overlap in several areas to form a coherent educational whole. It is not imperative under which main aspect the concept of differentiation is placed, but it is important that it gains a distinct place within the didactic-curricular approach.

Is differentiation described and discussed in the seven studies? The research teams have found differentiation described in a variety of connections: Differentiation of:

- learning tasks (B, Z, O, S)
- length of time to conclude a learning task (Z, O)
- extent of learning content (Z, O, SN)
- of methods – different methods (SN, O)
- group organisation and variation in learning tasks (O, SN, S)
- learning methods (O, S)
- alternative learning tasks (O, Z)
- level of expected mastery of content/learning tasks (O, B)
- suitably selected learning tasks from the general curriculum (O, B)

The different types of differentiations indicate how schools facilitate learning content and methods using multiple methodological practices based on traditional classroom teaching.

## e: Individual adaptation

Individual adaptation or facilitation also concerns all aspects of the curriculum. While this is similar to differentiation, it has a bottom-up perspective moving from the individual pupil to the teaching-learning community of the class. This is in accordance with the principle of individually and suitably adapted education, which is a main pillar of inclusion. It relates to all pupils and calls for more or less detailed individual educational plans or curricula for each pupil along with teaching flexibility – which in turn calls for extra resources in addition to regular teaching resources, according to policies related to some, but not quite all, of the seven research teams. Inclusive practices are based on developing, implementing and continuously revising individual educational curricula, particularly for pupils with special educational needs, in a connection as close as possible to the class curriculum. It has the single pupil and human being as its point of departure (Johnsen, 2014b).

How do the research teams describe and discuss findings related to individually adapted methods? The Macedonian team describes how they adapt communication methods and media to the special needs of their pupil (SM). The Zagreb and Sarajevo teams make individual plans for their focus pupils, who all have different special needs. In Sarajevo there is a special focus on how teachers observe, guide and introduce material and activities adapted to the learning opportunities of the selected pupils. The approach may be seen as a variation of the abovementioned appraising teaching (S, Z). The Belgrade study sums up examples of observational findings related to individual adaptation:

Special needs educators are active in providing adaptations to pupils with disabilities: They often clarify to them the information given by the class teacher. They support their concentration on the task at hand. They monitor task realization by single pupils and provide support for task accomplishment when needed. Special educators are engaged predominantly when pupils with disabilities are involved in the same tasks as other pupils, i.e. in tasks related to the general curriculum. The data show that the level of pupils' engagement in tasks is the highest possible (100%) when special educators' support is provided to them (B).

The following important aspects for the plurality of different educational needs (Johnsen, 2014b) are found in the cooperating research teams:

- Continuous acquisition of new methods and approaches
- Overview of different methods and approaches
- Flexible application of methods and approaches
- Multiple uses of methods and approaches in joint classroom settings

## f: Differentiation and individual adaptation

As the examples related to educational methods illustrate, reported findings do not distinguish clearly between differentiation and individual adaptation; indeed, in some cases the same examples are used to illustrate both perspectives. This may indicate that in practice individual adaptation takes place more "along the way" than in any systematic and deliberate advanced planning. The weekly curriculum or plan in the Norwegian case class may serve as an example of alignment between differentiation and individual adaptation: Every Monday the class is introduced to a weekly plan for learning tasks and i) the great majority of the class has the same plan; ii) two pupils have only a short part of the ordinary reading lesson added by a certain number of pages for silent reading in an easy-reading book; iii) three pupils with excellent arithmetic mastery have some extra challenging assignments in addition to their ordinary class tasks. These two examples may be characterised as differentiations. iv) one pupil has an individually adapted plan related to his level of mastery, but closely connected to the topics of the class plan. In this way individual adaptation and differentiation may be said to go hand-in-hand with the general class plan (O). Darlene Perner and her project group (UNESCO, 2004: 14) describe differentiation in the following way:

Curriculum education, then, is the process of modifying or adapting the curriculum according to the different ability levels of the students in one class. Teachers can adapt or differentiate the curriculum by changing: the content, methods for teaching and

learning content (sometimes referred to as the process), and, the methods of assessment (sometimes referred to as the products).

This understanding is in line with the abovementioned right of all pupils to receive meaningful and individually adapted education. Thus, Perner's broad definition of differentiation is compatible with the use of individual curricula when these are planned and implemented within the joint framework of all pupils in a class. It is an educational and special needs educational craft and art to make teaching-learning plans and practice them in ways that are meaningful to each pupil, yet also function for the whole class. The metaphor "concerted actions" is a beautiful illustration of the combination of individual adaptation and differentiation in order to create meaningful learning processes for all in a diverse class or group (Booth et.al, 2000). The metaphor views the class as an orchestra where, although pupils have different roles, together they create a holistic learning performance, similar to what musicians do in a symphony orchestra (Johnsen, 2014b).

## Dilemmas and challenges

Severely limited knowledge about special needs educational methods among ordinary teachers is most frequently mentioned as a serious challenge to the development of inclusion. As documented, several of the research teams add special education professional know-how to the projects during the project period (B, S, SM, T, Z). This may not come as a surprise in countries where the principle of educational inclusion has been rather recently introduced. Ordinary and special needs educational traditions differ from one another, even though they also have many similarities. Among the differences is a diversity of methods within special needs education as well as a more developed tutorial tradition, while catheter teaching is still criticised as a prototype of an ordinary teaching method. It is, however, problematic that in Norway, as an example, where the principle of a school for all and inclusion was adopted in the Educational Act in 1975, research indicates that a large number of Norwegian schools lack the professional skills necessary to give pupils with special educational needs sufficient support (Johnsen, 2014d). So for inclusion to be realised, ordinary teachers need sustainable support to extend their professional knowledge and skills radically in order to increase their reservoir of methods as well as other didactic aspects. At the same time as pupils with special educational needs are transferred from special schools and institu-

tions to ordinary schools, it is necessary to establish permanent positions for professional special needs educators in schools. This necessity applies to all the participating countries.

As mentioned, methodological considerations strongly affect choices of materials and equipment, such as literature, paper and pencils, computers and programmes, videos, materials for painting, drawing, sewing and cooking and equipment for physical education. Some pupils need special learning materials and equipment. Thus, pupils who are functionally blind need machines for printing in Braille and, when possible, access to computerised Braille transcription technology. Pupils with cerebral palsy may need access to BLISS symbol language and, if possible, to computerised communication programmes. Pupils with reading difficulties need special books, books on CD and other training materials. Pupils with developmental impairments need concrete learning materials and situations. However, as Vygotsky (1978) points out, they first and foremost need pedagogical guidance and support to transfer what they have learned into higher mental functions.

## Organisation

Along with method, organisation is part of the educational **how**. Methods and organisation are means through which teaching and learning content is intended to be mediated – similar to content, they are mediating tools. How can classroom- or class organisation contribute to individually adapted education and inclusion? Alexander (2000:185; 393) describes his findings regarding classroom organisation as either unitary or multiple. They are unitary when a teacher focuses on the whole class rather than groups or individuals. The term multiple is used when the teacher, in addition to paying attention to the whole class, also focuses on several sub-groups, different kinds of relationships within and between groups as well as on their relationship with individual pupils. Compared to these two categories, educational inclusion depends mainly upon a multiple focus. This is in line with similar discussions of methods listed above. The continuous relationship between educational considerations regarding the whole class and the plurality of pupils with different educational needs is at stake (Johnsen, 2007; 2014b). When examined in more detail, there are several aspects and levels of multiple organisations in an inclusive perspective, such as organising a) different time perspectives, b) group size, c) educational scenes or places, and d) use of educational resources.

## a: The time perspective

Schooling is a complex activity, requiring organisation along a time axis, from the long-term to the most detailed short time planning and practice. Organisation on all levels may promote or inhibit inclusion. Therefore, all stakeholders of educational organisation in ordinary schools need to be aware of the principle of inclusion, since they have joint responsibility for implementing it.

**Long-term organisation.** The school administration play an important role when it comes to the overall organisation of the frame of educational activities at school – in cooperation with the school staff and dependence upon traditions and attitudes. Long-term planning may involve planning for a lifespan, such as when parents and schools together make a plan about how to organise the education of a child with special needs focusing on their future career and independent living situation. Some schools make “five-year plans” about how to realise new educational principles such as inclusive practices, to take another tentative example.

**School year and semester organisation** are also seen as long-term projects that concern sectioning and coordination of main aspects of the teaching-learning process in a long-term school curriculum. Depending upon the size of the school, several teachers ideally participate in this organisation together with the school administration and in accordance with national and local curricula. In order to lay the foundation for inclusive practices, it is crucial that all pupils – and specifically pupils with special educational needs – have advocates in this long-term organisation. There is reason to believe that schools with special needs educators take on the role of “inclusion advocates” in cooperation with teachers. The relationship between the two kinds of long-term curricula, class- and individual curricula, form a necessary foundation for further inclusive practices.

How is long-term organisation practiced in the project schools? Are educational frames organised in order to support inclusive practices? Of the seven research teams, five report (B, S, SM, T, Z) making agreements with their participating schools regarding organisational frames, enabling cooperation in trying out inclusive practices for one year or more depending upon how long a time they plan to carry out their field work. Such agreements are particularly prominent in the action research studies. Thus, in these studies essential aspects of long-term planning contain agreements where participating universities and in

some cases other stake holders add resources in the form of professional special needs educators acting as advisers, and also educators (Igrić & Cvitković, 2013; Jachova, 2013; Rapaić, Nedović, Stojković, & Ilić, 2013; Salihović, Dizdarević, & Smajić, 2013; Zečić, Čehić, Džemidžić Kristiansen, & Hadžić, 2013). Although these agreements are required to execute major innovations, they also raise an important question of sustainability; or whether and in what way agreed project organisation will continue, when the research collaboration is completed. Two of the universities (L, O) limit their studies to exploring the schools as they are. (Johnsen, 2013b; Kogovšek, Košir & Ozbič, 2013).

Do the cooperating schools make long-term plans? As an example, the Norwegian case school, they have a twofold annual long-term plan 1) an overall joint plan for the whole school and 2) organisation of the teaching of each school subject on each grade level. 1) The overall plan, called the activity plan, is developed by the staff for one school year at a time and delivered in printed form to each family having pupils at school. It consists of a) an educational vision, b) educational aims, c) priority areas, d) the school model concerning content and organisation, e) educational main approaches, and f) prioritised activities on each grade level. The document is 20-30 pages long and contains additional information about persons in charge for various key activities and all the classes. How is the principle of educational inclusion dealt with in the annual plans selected for this review? The principle of a school for all and inclusion is not mentioned explicitly. However, the following goals suitable for promoting inclusive practices are highlighted:

- To ensure that pupils feel safe, are cared for and thriving and that they are motivated for a variety of different learning tasks
- To use screening tests in order to identify pupils who need more training in reading acquisition and beginning arithmetic
- To facilitate adapted education related to individual pupils and groups through tutorial courses, and to hold these training courses across grade levels for pupils who need more support in literacy acquisition and arithmetic
- To give pupils the opportunity to learn through independent learning tasks, peer cooperation and differentiated assignments.

Four school years later the annual plan contains the following additional goals:

- All pupils should experience the joy of success academically and socially, individually and in groups on a regular basis

- Develop a diversified learning environment through using a variety of teaching methods so that pupils can acquire knowledge and skills in accordance with their own abilities and strengths (O).

The two types of long-term curricula mentioned, class and individual teaching-learning plans, interrelate and form a necessary basis for detailed inclusive practices. The concrete teaching-learning curriculum is understandably extensive and complex. Multiple and inclusive teaching practices require that a teacher have broader and more diversified knowledge and skills than those require in traditional class teaching (Alexander, 2000; Johnsen, 2014b).

**Organising the school week** is usually the responsibility of the teacher or teachers working on the same age level. In some of the studies special needs educators who join the teachers in the ordinary school. The making of weekly plans is mentioned specifically in two of the cases. In the Norwegian case-school weekly learning tasks are collected in miniature “week curricula” adapted to individual learning needs and handed to pupils, as described above (O). In Macedonia each subject teacher makes a weekly plan for the class adapted to the pupil with special needs (SM).

**Organising the school day and the lesson.** It is assumed that the individual teacher or cooperating teaching couple or teams organise the school day and lesson. In the Norwegian case information about classroom activities, including organisation, methods and other didactic-curricular aspects are acquired from open in-depth interviews and classroom observations. During the years of the longitudinal study, the classroom observations become steadily more detailed and “fine-masked”, down to reporting at five-minute intervals (O). The study shows multiple ways of organising in line with the multiple teaching practices described by Alexander (2000): A day – or part of a day – may begin with the teacher focusing on the whole class, proceeding with individual or group cooperation with individually chosen learning tasks, and concluding with plenary dialogue between pupils and teacher (O). Different organisational means may be carried out by one or more educators, and all teachers may pay attention to every pupil’s individual educational needs – including when they are telling a story, explaining something or giving information in plenary. A good storyteller giving an interesting story manages to convey diverse content aspects at multiple levels of comprehension and empathetic mastery (Ole Vig, 1852-53, on “the living word; živa riječ” in Johnsen, 2000). Thus, a single lesson is often organised into several parts. In the case of pupils with special educational needs, it may be

“everything from series of repetitions to a fine-meshed set of different teaching-learning tasks tailored in accordance with the learner’s endurance span” – or the pupil follows the same instruction as the rest of the class – possibly with extra support. In schools where special needs educators or assistants participate in the teaching-learning process, the school day is organised in accordance with when more than one educator is available during the day.

While not all teams focus on explicit information about organisation of the long-/short-term teaching-learning process, the Sarajevo and Oslo teams describe the organisation of a typical school year, -week and -day (O, S). Other research teams have implicit information about internal organisation of schooling along the time axis in the two former anthologies (Johnsen, Ed., 2013; 2014) and in current anthology (Igrić, Cvitković & Lisak, 2019; Jachova, Angeloska-Galevska, & Karovska, 2019; Johnsen, 2019b; Kogovšek, Košir & Ozbič, 2019; Rapaić, Nedović, Stojković & Ilić, 2019; Salihović & Dizdarević, 2019; Zečić, Čehić, Džemidžić Kristiansen & Hadžić, 2019). The Sarajevo and Norwegian cases are described as schools using multiple organisational means suitable for inclusive educational practices. In both cases collaboration between pupils is encouraged, and peers support each other (O, S).

Extra educational support from ordinary teachers, special needs educators or assistants is provided in the majority of participating schools and organised either out of the ordinary classroom or inside (B, O, S, T, Z). In the Slovenian classes, which are either organised as special classes for pupils with hearing impairment or mixed classes of pupils with and without hearing impairment, pupils are asked to report on their experiences. Findings indicate that communication occurs more easily in special classes than in mixed classes, where it seems to be mostly on the premises of hearing pupils (L). Thus, the Ljubljana study sheds light on a widespread problem for pupils with hearing impairment “from Norwegian to Ethiopian mixed classes”; to indicate this problem’s wide international prevalence.

## **b: Organising group size**

A fundamental criterion for inclusion is that all pupils belong to an ordinary class or group. In the Nordic context, this means that all pupils of the same age are organised together in classes. Age is thus the overall criterion for placement, as it usually is in the other participating schools. Although belonging to a class in an ordinary school is a fundamental principle underlying

ing the idea of inclusion, it does not mean that the classroom as an organisational entity is an absolute. Thus, while the class is important as a main organisational entity as pupils' "educational home", the following arrangements are also considered:

- Organising into large classes (two or more classes together)
- Organising into groups
- Individual or dyadic teaching

Along with whole-class structure, these organisational entities are arenas where a variety of possible approaches to teaching and learning are applied. An often-used example is that individual learning is arranged as either independent learning or a dyad between a pupil and either a teacher or special needs educator (or possibly an assistant). Dyadic teaching might create excellent possibilities for various high-quality teaching-learning approaches, from effective training to creative dialogue. However, it also has serious pitfalls. For example, extended use of teacher-pupil dyads as well as small group teaching might be a way to avoid making radical changes in traditional classroom management. The consequence may be that pupils with special needs are separated from the rest of the class activities for a considerable part of the school day. Pupils thereby lose important opportunities to be in the company of their classmates and learn how to take part in general peer socialisation (Johnsen, 2007; 2014b).

Is a flexible use of different group sizes practiced in the seven studies? Who is offered individual and small group teaching? Do pupils with special needs have a sense of belonging to an ordinary class? How does use of organisation in different group sizes contribute to inclusive practices? Ordinary classes and classrooms are at the centre of this research cooperation project. Pupils with special needs of any kind spend most of their school day in their home-classroom. This is self-evident, since the main focus of the research project is to examine the ability to develop inclusive practices in ordinary schools (B, O, S, SM, T, Z). As mentioned, several of the research teams have made agreements with schools to implement innovative work in their action research, where the special educational support provided by the research team is an important aspect of efforts to try out inclusive practices.

What other organisational measures are reported? One of the research teams reports organising *large class* through merging two classes into one and at the same time teaching two subjects, such as biology and geography. In this way, two teachers are available for pupils (SM). Two teams report their use of teaching

in small groups in addition to ordinary class organisation (O, S). What is the purpose of using small groups? As mentioned above, *small groups* are used for brief workshops – usually twice a week during a four- to six-week period – to support pupils who need help overcoming specific barriers in their reading or arithmetic acquisition (O). These workshops are held during a part of the school day when the class is occupied with individual tasks or internal group work. In this way, pupils do not miss any subject teaching or joint information. According to observations, pupils walk quietly out of the classroom to the workshop. When interviewed, the class teacher reports that at first, it is very popular in the workshops, and classmates ask to participate with the pupils needing extra help. However, as the workshop arrangement becomes more systematic and the same pupils enrol in them – those who need extra education – they become reluctant to leave the classroom (O). This is one example of small group teaching organised outside the classroom. However, group work is also organised inside the classroom (O, S). The Sarajevo team describes small groups called “circles of friends” that are heterogeneous and consist of pupils having different mastery levels. One of the goals for this peer cooperation is that the more able pupils help those who need extra support (S). Several of the research teams have organised *individual or dyadic teaching*, specifically for pupils who have been found to need special support after having an in-depth assessment made of them (Igrić & Cvitković, 2013; Jachova, 2013; Rapaić, Nedović, Stojković, & Ilić, 2013; Salihović, Dizdarević, & Smajić, 2013; Zečić, Čehić, Džemidžić, & Hadžić, 2013). In the Norwegian study there are two very different cases of individual teaching based on different learning needs. 1) A pupil from an immigrant family is allocated extra resources to cover one daily hour of instruction in Norwegian language. More resources would be given for a group of newcomers. 2) Resources for two daily teaching hours are allocated for one pupil due to special needs. They are used differently between school years: One year they are used for individual teaching out of the classroom combined with co-teaching in the classroom. The next school year the pupil is in the classroom together with support teacher (O). In the Sarajevo case schools’ dyadic teaching is used to train specific speech difficulties (S) and followed up in the joint class. Thus, teaching is reported in dyads and small groups both inside and outside of the classroom. The different kinds of organisation as well as frequency and proportion of the school day may contribute positively or negatively to inclusion for the class and the individual pupil alike. This is a dilemma that needs to be treated carefully and in cooperation with parents.

## c: Educational scenes or places

As indicated, in addition to the traditional classroom, there are other arenas that may be suited to organising teaching-learning sequences, for instance smaller rooms for group- and dyadic teaching. Some school buildings are organised with group rooms connected to traditional classrooms. Large-class teaching is possible in schools with one or more large rooms, including a traditional gymnasium, auditorium or buildings with opportunities to open doors between two (or even more) traditional classrooms. However, class- and group rooms are not the only places suitable for teaching-learning scenes. What kind of environments could be appropriate for organising “outside classroom education”? Several outdoor arenas are used in different countries and local schools. The schoolyard and school neighbourhood may be used provided they are safe and do not interrupt the school day for others. Study trips and -visits to cultural events, workplaces and natural landmarks are arranged during each semester. An out-of-school day has gained a permanent place on the monthly schedule in several schools, with the local woods used as an arena for teaching-learning activities (O). There are at least two main arguments for applying out-of-classroom and out-of-school activities. 1) Sitting quietly at their desk in a crowded classroom is not a healthy environment for any child. Pupils need space in order to thrive, learn and develop. Even the most pleasant classroom is too small in a physical sense to be an ideal permanent learning environment. 2) When it comes to inclusive organisation, it depends upon a number of factors related to the classroom and how it is possible to create flexible solutions and a friendly and welcoming learning environment for everyone. One possible addition to the classroom is the school library. It may have the potential to become “the heart of the school” depending upon its content and resources, especially when it comes to having a professional library staff as well as a teacher- and special needs educational staff. A resource-based aspect of inclusive organisation is to use the classroom as a base combined with different activities outside of it for all pupils. Individual pupils and groups may be assigned tasks where they go elsewhere to solve them; for instance, to the school library in order to search for handbooks or to another room in order to interview a pupil or assist a group. They might be asked to go out and measure the circumference of trees or go shopping at the local grocery store. Currently, pupils with special needs are the ones who most often leave the classroom; consequently, they often feel negatively labelled. The inclusive school needs to be open to “inside and outside classroom activities” to a great extent. Ideally, moving between educational scenes should be natural for all pupils. Accordingly, flexibility and openness when

it comes to making use of the existing variety of educational scenes contributes to enrich the learning environment for all. Additionally, it allows the possibility of providing specific studies and support services adapted to the diversity of pupil interests and levels of comprehension (Johnsen, 2014b).

What kinds of *educational arenas* are available and made use of in the seven studies? All participating project schools have rooms to work with pupil groups regardless if the school buildings are old or new. In the Norwegian case, the school moves into a brand new building during the longitudinal research period. The new building is richly equipped with shared use of extra group rooms and other rooms in different sizes, including an auditorium, and thus provides excellent conditions for the flexible use of a variety of rooms. However, the old school building, of which the oldest part is from the latter part of the nineteenth century, also has several rooms in different sizes for flexible use, even though they are not as up to date (O). The long-term organisation of available rooms is an administrative question to be answered in cooperation with the teaching staff. Out-of-school teaching, or “teaching in the woods”, one day a month has become common in Norwegian elementary schools (O).

Whether all participating schools have rooms suited to small group- and individual teaching on a permanent basis has not been fully reported. Generally speaking, having rooms for group work as well as a room for regularly visiting professional colleagues, such as the educational psychological service or other external services and unforeseen immediate needs, may be problematic in some schools, especially if they are overcrowded. In these cases, there may be a lack of physical, structural frame factors for organising small group- and individual teaching outside the classroom. The school library is also mentioned above as a possible important arena for inclusive education. Most of the participating schools have a school library or book collection. If they do not have libraries, many of the schools have made corners and other parts of the building into social meeting places where pupils can relax – often with flowers and decorations that include maps, historical books and pictures. Even though some of the participating schools have school libraries or books to lend, none of them is fully equipped with librarians or has developed libraries that deserve to be called “the heart of the school”.

## d: Educational resources

Flexible organisation of schooling depends upon flexible access to resources, especially human resources. School and local communities have to take into consideration many kinds of resources, which are described below in the chap-

ter on context and frame factors. This section focuses on human resources, for instance ordinary- and special needs educators as well as assistants on occasion. One ordinary teacher can do a lot, but teaching divided between two or more teachers and, ideally, special needs educators (Johnsen, 2014b; Igrić & Cvitković, 2013), allows for quite a number of other organisational options, such as co-teaching, where more than one educator works in the classroom. Co-teaching, however, presupposes that educators are willing to change their professional attitude and teaching style from the traditional self-sufficient and independent responsibility of an entire class. Teaching with one or more colleagues requires (again: ideally) division of tasks and cooperation when lessons are prepared, practiced and assessed so that the capacity of all educators is effectively utilised and nobody is passive while one of the teachers assumes traditional responsibility for the entire class. This also means that preparatory work and teaching tasks are divided among colleagues during the planning process. (Bigge & Stump, 1998; Dalen, 1982; Dixon-Krauss, 1996; Hjelmbrække, 2014; Johnsen, 2014b; Mittler, 2000; Booth et. al., 2000). Co-teaching thereby encourages flexible organisation. It also encourages collaborative learning, where pupils divide tasks among themselves, discussing, assisting and drawing conclusions with support from educators. Organising pupils into face-to-face promotive interaction in small groups for cooperating learning is applied to a variety of learning tasks. It takes into account Vygotsky's (1978) focus on having peer support in the learning process, as demonstrated in practice (Dzemidzic, 2007; Kristiansen et al. 2019). How do the schools in the seven studies organise their use of human resources? The following discussions about use of educational resources are related to the organisational aspects mentioned above: whole class scenario – large class -, group-, and dyadic organisation- in addition to inside and outside classroom teaching.

***The human resources in whole class teaching*** – whether it is in the form of unitary or multiple organisation (Alexander, 2000), are usually based on one teacher working alone. According to the Belgrade study, observational data indicate that 70 % of teaching is whole class teaching (B). The studies have detailed information about different kinds of teacher-pupil relations within whole class settings that are based on a variety of human resources. The Sarajevo team describes a situation where the teacher gives the whole class information, feedback or instruction either in the form of one-way communication from teacher to class or as two-way interaction between teacher and individual pupils or groups (S). A variety of interaction patterns are described by the teams,

including storytelling, pupil presentations with discussions and feedback. In the Norwegian case, the teacher is observed applying the following ways of adapting the teaching to individual pupils; i) explaining a phenomenon in different ways; ii) repeating; iii) giving varied examples; iv) approaching individual pupils and groups directly; v) combining the previously mentioned kinds of communication with handing out worksheets to every pupil – having written messages on the blackboard ahead of the lesson – giving the same message orally. With the computer technology introduced in the Norwegian case school, the teachers have even more possibilities for meeting individual and group needs within the whole class. As the laptop has taken over the function of the blackboard in the final academic years of the longitudinal study, a number of new additional resources have become available through having an internet connection in every classroom (O). The internet currently offers vast opportunities to enrich individually adapted education with an increasing collection of educational illustrations, examples and tasks aiming at different levels of mastery as well as support for several disabilities. Upgrading teachers and special needs educators contributes to the development towards inclusion, of which the action research and pre-post classroom studies are examples. With the introduction of the internet as a teaching-learning media, it is also crucial that teachers are trained to critically use information. The Ljubljana team directs attention towards communication between teacher and class and among pupils in general. As mentioned, their findings strongly indicate that pupils with hearing impairments perceive communication in their ordinary class as unclear, whereas pupils in a special class for the functionally deaf and hard of hearing pupils are more satisfied (L). This exemplifies in a concrete way the very important challenges of fulfilling the diversity of communicative abilities that is a necessary part of inclusion. It also raises the question whether educational resources are too sparse. Pupils with sensory disabilities clearly need alternative or additional ways of communication, as do many other pupils in a typical class. Moreover, several pupils may have less obvious difficulties understanding what is communicated.

***Educational resources in large classes (two or more classes together):*** Merging two classes is specifically mentioned as a way of organising teaching in the Macedonia-, Sarajevo and Oslo cases. It is used in order to realise so-called “active teaching and cooperative learning” (SM, S). In the Oslo case, the class woodwork with tools requires two teachers, who have developed co-teaching in different subjects through the years, and specialised in creative teaching-learning processes (O).

**Educational resources in groups** are common within the classroom. They are also divided between classrooms and other available rooms. The Belgrade observations indicate that barely 6 % of instruction is organised as group work (B). An important goal of group work is to develop collaborative learning arranged in connection with specific learning tasks or projects for shorter or longer periods. “The circle of friends”, described above is developed to encourage academic and social peer support across levels of mastery, including pupils with special needs (S). The teacher often initiates group work, but pupils also do. Thus, in the Norwegian study, when pupils work on specific tasks, some prefer to work individually while others sit in pairs or groups. Some pupils get help to barricade themselves from visual and auditory impressions that disturb their concentration – all these organisational forms are used in the same classroom with one teacher (O).

Group work also takes place outside the classroom. As described, special needs teachers either are in the classroom or have their own “workshops” – often in smaller rooms with a lot of alternative materials suited small groups and individuals, such as in one of the Sarajevo case schools. Several of the research teams report on special needs educators working with individuals or groups in alternative rooms (B, O, S, SM, T, Z). Norwegian schools receive a certain amount of funding to arrange flexible teaching-learning conditions, such as the abovementioned workshops (O).

**Educational resources in individual teaching:** Part of the school day in the participating schools is intended for individual school work. The Belgrade observations indicate that approximately 21, 5% of the lessons in their case school are spent on individual schoolwork with individual guidance from the teachers. What impact does participation in a regular class have on pupils with challenges or disabilities? The Belgrade observations show that “... the teachers devote a large proportion of their time to giving individually adapted guidance to pupils with disabilities” (B). The rest of the class gets approximately the same amount of individual guidance as the pupil with disabilities. However, their observations also indicate that pupils with disabilities “...take an active role in the classroom” (B). The Macedonian team presents an illustrative example of how the class teacher pays individual attention to a pupil with special needs in the larger class setting in accordance with advice from special needs educators:

“... the teachers ... are instructed, to try to give more elaborate instructions and directions individually to the pupil with a cochlear implant” after they give general directions to the entire class, (SM).

While individual guidance is generally given to all pupils, some pupils need more support than regular flexibility covers, as indicated. Some of the case schools have added extra staff members – first of all with special needs educational competence – during their field study. Systematic teacher upgrading takes place, most notably in the action research studies. In some of the schools, researchers who are special educators also teach and train selected pupils with disabilities or challenges. Two of the empirical studies have no interventions (L, O). However, in the Ljubljana study special needs educators teach in the special classes for pupils who are functionally deaf and hard of hearing. As regards the Norwegian case school, it has the same statutory rights as all Norwegian schools to apply for extra resources for pupils “... who either do not or are unable to benefit satisfactorily from ordinary tuition ...” (Education Act, Section 5-1). It is granted when the need is documented and accepted a) by the educational-psychological service and b) the municipality’s educational office. The case class obtains extra resources for special needs education of three pupils during the longitudinal study (O).

***Educational resources outside the classroom and school:*** The situation of having special needs education taking place partly outside the classroom, either in groups or in educator-pupil dyads, is described already. Dyadic special education is characterised as systematically planned and related to the specific needs of the pupil. The dyad provides an excellent opportunity for dialogue with the pupil, something that may be difficult in the open classroom environment. Educational resources are also organised in out-of-school activities, such as “teaching in the forest”, excursions and cultural events. “Teaching in the forest” is arranged by an individual class teacher or in groups of two or more classes (O). Several activities require more than one adult. Therefore two or more classes arrange the event and, correspondingly, with two or more teachers together and even assistants or special educators. In some cases parents are invited to participate as volunteers. When these events occur, the educational content often consists of one or more cross-disciplinary tasks or projects that need planning, cooperation and task division. This kind of arrangement encourages an explicit awareness of every pupil’s level of ability and needs. The same may be said about project teaching inside the school buildings themselves that may have many of the same characteristics. The Norwegian case school contributes with a good example of this, where the two previously mentioned class teachers work together with their classes in a cross-disciplinary project lasting one school year. During this time, one of the pupils – who participated in a special needs group in lower grades – starts to flourish. She produces interesting results, show-

ing that she has in-depth understanding and great interest in the project and, at the same time, demonstrates substantial progress in reading, writing texts and arithmetic. Her progress and well-being in the project is a good example of educational inclusion (O). However, the mentioned organisational alternatives and access to educational resources does not in itself guarantee inclusive education. They represent a possibility. What about dyadic and group teaching outside the classroom? When they are used only for pupils with special needs – and to a great extent, as has been documented from a large number of schools in Norway (Johnsen, 2014c) – it is segregation.

## Dilemmas and challenges

Organising is an important aspect that can enable or prevent development of educational inclusion, as indicated in the presentations above. In the following the two most typical aspects containing dilemmas and challenges are discussed: 1) organisation of teaching staff and 2) organisation in one or multiple teaching-learning arenas.

**1: *Organising teaching staff.*** As indicated in the reported findings, individual support is organised in different ways. The description of the Belgrade team above seems, however, to be more or less characteristic for most of the teams, even though there are important exceptions during the period of this research project. As pointed out, support of individual pupils within the joint classroom most often happens with an individual classroom teacher. The role of this teacher bearing the sole responsibility for creating an inclusive class is described in a recent Swedish PhD dissertation (Kotte, 2017). The main findings observed and expressed by the teachers are:

- The majority of teachers have a positive attitude to the idea of inclusive education
- They are interested in learning more about inclusive education
- They strive to plan and implement inclusive lessons in their classrooms
- Mediating knowledge is regarded as important, but difficult
- They feel that they teach a large number of pupils in need of support
- They feel that there is a dilemma balancing their teaching between individual pupils' needs and the interest of the class as a whole
- They worry about not seeing the needs of all pupils sufficiently
- They express that they need further educational or special needs educational teaching support

The dilemmas and challenges referred to here are recognised in the seven studies of this research project. However, as pointed out in Kotte (2017), class teaching with an individual teacher does not necessarily consist of pure “one-way lecturing”, as also documented in the Norwegian classroom observations (O). Storytelling, dialogue teaching and apprising teaching are three of several teaching methods that may contribute to acquiring knowledge about pupils’ level of mastery and, hence, to adapted teaching.

As reported in the seven studies, individual support within the classroom also takes place with more than one educator. More detailed or in-depth special educational support is given in several of the studies, either by special needs educators (S, T) or assistants or two regular teachers (O, Z). An example of this is logopedic support and teaching pupils in two case schools (S). The most common special needs educational support is provided as guidance to teachers and assistants (B, S, SM, T, Z). As also mentioned, the professional special needs educational support in these cases is either provided as part of the projects or financed by external organisations. The individual additional special needs resources in the Norwegian case are used a) inside the classroom as co-teaching, b) in workshops outside the classroom or c) as individual support combined both outside- and inside the classroom (O). The findings in the Swedish research supports the view expressed here that organising classroom teaching with only one teacher raises a serious challenge to educational inclusion (Kotte, 2017).

**2: Organisation in one or multiple teaching-learning arenas.** Is the idea about the inclusive school and class tantamount to having all pupils in the same classroom at all times? Some people would probably answer yes. As this chapter and the seven articles from each of the research teams in this anthology indicate, several organisational options are presented as possible options for the inclusive school. However, there are several dilemmas, challenges and limitations – and creative possibilities – concerning in which way, how much and for what pupils different teaching arenas can be used as aspects of inclusion, such as the following:

1. Placing some of the pupils in their local school in special educational units is on the wrong side of educational inclusion
2. Individual and group teaching of pupils with special educational needs organised outside the classroom large parts of the school day (Ytterhus & Tøssebro, 2005) contributes to retaining traditional “pre-inclusive” teaching and prevents their development of a sense of belonging to the class and thus to inclusion

3. Using out-of-class workshops only for pupils with special educational needs raises a serious challenge to inclusion
4. Organising relevant parts of the school day with out-of-class workshops and activities for a variety of teaching-learning activities for different individual pupils and groups across levels of mastery represents a creative extension of traditional classroom teaching with possibilities to develop educational inclusion
5. Organising most of the school day and -week for all pupils belonging to the same class with the class teacher co-teaching with a special needs teacher provides opportunities for developing a common sense of belonging and inclusion

According to the findings of the seven studies, a number of methods and organisational measures are successfully tried out. However, several dilemmas, challenges and limits remain obstacles on the way towards developing inclusive schools for all participating schools.

## Summary

While educational methods and organisation are presented in a joint chapter due to the many overlaps between these important didactic-curricular areas, they are divided into two main sections.

*Starting with methods*, descriptions and discussions are based on the question: How can educational methods or approaches support individually adapted education and inclusion? The main findings are summarised in the following:

- The lecturing method is observed to be combined with i) illustrations, ii) explanations, iii) demonstrations, iv) inductive methods that focus on discovering, v) analysis, vi) writing on the black board, white board, “flip over”, vii) use of laptop and internet.
- Flexible use of alternative teaching & learning material, individually adapted development and use of alternative methods and material, systematic scaffolding adapted to the diversity of pupils’ levels of mastery, appraising or diagnostic teaching, and individually adapted step-by-step methodology; these may all serve as contributions to inclusion.
- Differentiation – a curricular top-down perspective – examples: Differentiation of learning methods, learning tasks, alternative learning tasks: timing,

extent of learning task, methods, group organisation, level of expected task mastery, suitably selected learning tasks from the general curriculum

- Individual adaptation – A curricular bottom-up perspective: Continuous acquisition of new methods and approaches, overview of different methods and approaches, flexible application of methods and approaches, multiple uses of methods and approaches in joint classroom settings
- Differentiation and individual adaptation hand in hand – individual adaptation "along the road", in differentiated weekly plans, class plans & group plans & individual plans, meaningful teaching-learning processes for all, teacher and special needs educator cooperation, "concerted actions" in the class

Dilemmas and challenges:

- Teaching too often consists of the typical teaching method of lecturing that is directed towards the whole class; also called class teaching or catheter teaching
- Severely limited knowledge about special needs educational methods among ordinary teachers

**Organisation** is, along with method, the educational *how*; they are means through which teaching and learning content is intended to be mediated; like content, they are mediating tools. The main question directing studies of organisation is: How can classroom or class organisation contribute to individually adapted education and inclusion? The main findings can be summarized as follows: Of the two characterisations, unitary or multiple organising, ordinary education is criticised for being too often unitary, in the sense that a teacher instructs the whole class as if all pupils are on the same level of mastery.

There are several dimensions of organising the teaching-learning process, such as:

- The time perspective in organising
  - ▶ Some schools make "five-year plans" for how to realise educational principles such as inclusive practices
  - ▶ School year and semester curriculum in cooperation between school administration and teachers
  - ▶ Joint semester curriculum for all classes on the same age level or cohort
  - ▶ Individual semester, short-term (one week) and daily curricula

- Organising group size
  - ▶ All participating schools place the pupils in classes of between 20 and 30 pupils as the main organisational form. In addition the pupils are occasionally and systematically organised into:
    - large classes (two or more classes together)
    - groups
    - individual or dyadic teaching
- Organising in educational scenes or places: classrooms – smaller rooms for group- and individual teaching – out-of-classroom and out-of-school teaching arenas
- Educational resources and organisation
  - ▶ One teacher in the classroom is the most common organisational form in all participating schools
  - ▶ Special needs educator in the classroom or in group- or individual teaching
  - ▶ Assistants in the classroom with the class teacher
  - ▶ Special needs educator in the classroom with the class teacher
  - ▶ Two or more teachers with large classes
  - ▶ Class teacher/s and volunteering parents in out-of-class events

Generally, special needs educators take on the role of counselling the school and parents. They may take part in making individual plans (S, SM, T, Z). In some of the studies, they also teach pupils with special educational needs (S, SM, T). In two cases, experienced special schools share their knowledge and skills with case schools (B, S). There are cases where the classroom teachers have an assistant with them (Z), or the teaching is organised in a combination of workshops and co-teaching with assistant (O). However, the class teacher most often has the sole responsibility for the whole class. In all seven cases the researchers are special needs educators (B, L, O, S, SM, T, Z).

Organising education for inclusion is confronted with several challenges and dilemmas. The two most usual dilemmas are related to a) 1) organising teaching staff and b) organising in one or multiple teaching-learning arenas.

The argument made at the beginning of this chapter for placing educational methods and organisation together is that there are many grey zones between the two; a teaching method may be realised through organisation. Something similar can be said about grey zones between content, method and organisation. An example may illustrate this point: Klafki (1999) argues that educational content consists of substance and values. On a more general

level, Alexander (2015) argues that pedagogically speaking, teaching encompasses values and beliefs. But how are values taught? Literature may certainly contribute to this end, and so may relevant methods, organisational forms and content. Thus, all three may be used interactively. For instance, one way of teaching about cooperation is to place pupils in small cooperative learning groups in face-to-face promotive interaction (Demidzic, 2007; Demidzic Kristiansen et al, 2019). In this way, the content and method of cooperation interacts with the organisation of groups. We could therefore say that they are interacting “in the grey zone”.

The chapters presented so far have focused on pupil/s, assessment, educational intentions, educational content as well as methods and classroom organisation. They represent classical educational categories that hearken back to Plato and ancient Greek traditions. They are commonplace categories and parts of a joint European educational heritage (Johnsen, 2000). The next three chapters focusing on communication care and context or frame factors represent an extension of the curriculum field. Two of them, communication and care, arise out of current humanistic special needs education discourse with links to regular education, psychology and other related research disciplines. (Befring, 1997; Johnsen, 2000; 2007; 2019a; Noddings, 1992; 2003). The focus on context or frame factors is based on a cultural-historical approach and the related discourse on educational ecology based on the classical works published in the same year of Bronfenbrenner (1979) and Goodlad (1979). Contextual explorations highlight the important connection between the inner activity of schools – the micro level – represented by the seven didactic-curricular main aspects – and schools’ macro contexts; the eighth embracing area. Examining the contextual aspect is also crucial for establishing the trustworthiness and authenticity of this comparative research project.

## 7 Communication

Without communication there will be no education, no matter how qualified and relevant facilitation of content, methods and organisation seems to be (Johnsen, 2001a).

Communication has not been a major aspect of mainstream didactic or curricular tradition. Neither was it a main area of the initial curricular rela-

tion approach, but was presented as an important sub-category of educational method. In modern learning theories such as Piaget's and western mainstream biological-logical theories, the focus has been almost entirely on individual cognitive development and the learner's ability to solve problems. However, Lev Vygotsky and the cultural-historical school of education turn our attention towards the living context in the teaching-learning-development process. This marks a focal shift where attention on individual problem solving is understood within cultural-historical context, at least by large parts of the community of educational researchers. The bridge between cultural context and the pupil is communication, and it is certainly at the core of interaction and mediation as argued by Vygotsky (1978), Bruner (1996), Rogoff (2008); Rommetveit (1972; 2014), Rye (2001; 2005), Trevarthen (2014) and Wertsch (1985). They direct attention to the following factors:

- Pupils learn through interaction with their fellow human beings and their environments
- Language and communication are essential tools in learning and cognitive development
- Teachers, parents and peers may function as mediators and discourse partners in joint teaching and learning processes

Cultural-historical tradition and practical experience strongly indicate the importance of communication and mediation for the learning and developmental process. Consequently, it is promoted from a sub-category of methods to a main aspect of didactic-curricular activities (Johnsen, 2014c). Good discussions with international Master-level students in special needs education support this choice (Johnsen, 2007).

A similar emphasis on communication is evident in the participating research teams, as the following contributions show: a) communication with pupils who are functionally deaf or hard of hearing (L, SM); b) exploration of the role of communication as a contribution to inclusion (B, O); and c) special needs education of pupils with communication impairments and challenges (S, SM, T). The Zagreb team points out that "communication is very important for sharing information and knowledge, and it can be a motivating factor for good teacher-pupil collaboration" (Z). In line with their point of view, communication in an educational context is divided into the two sub-categories, communication technology and communication as human relation or relational psychology (Johnsen, 2007).

## Communication technology

Communication technological concerns are highlighted in the following questions:

- Can we hear and see each other (levels of light and noise in the classroom)?
- Does anyone need hearing aids?
- Do we need special communication media such as sign language, signed speech, BLISS-signs, icons, computer communication programmes or other augmentative devices?
- Do we need systematic step-by-step support when learning to understand and apply language?

Currently, the concept of communication technology focuses on designing, constructing and maintaining communication systems in digital and other forms. In educational and special needs educational context the meaning of the term extends to applying different means of communication. It covers the use of communication programmes and -technology as well as use of different “languages” in a broad sense.

As mentioned, facilitating communication for pupils with functional deafness and hard of hearing is a main topic in two of the studies (L, SM). Alternative communication means are in focus, such as in combinations of oral method with lip reading and total communication, sign language and facilitation of communication for pupils with cochlea implants. Moreover, in order to meet the variety of pupils’ various comprehension – whether related to hearing or other impairments – communication technologies and even combinations of different communication means are important aspects of special needs education and inclusion. Communicating through more than one sense is a classical way of adapting teaching to pupils’ different preferred channels of perception. Different kinds of so-called multi-sensory communication means are described in several of the research reports;

- a) Adapting to an open, but acceptable level of “working noise” in the classroom (O, S)
- b) Maintaining appropriate light in the classroom by having sufficient lighting as well as dimming strong sunlight in order to adapt light conditions that meet everyone’s needs (S)
- c) Using pictures and illustrations, including flashcards: A great deal of hand-made educational material with combinations of pictures and written assignments has been made and stored for the elementary grades. Posters

are also placed strategically in classrooms. The Sarajevo schools have a multicultural and multilingual pupil population; therefore, they write keywords in Bosnian, Romano and English. The Bosnian case schools have pupils from a number of linguistic minorities, including Serbian and Albanian as first languages. This means that some of the pupils who have learned to read in their first language may also have to deal with two alphabets, since Cyrillic, Balkan-Romano and Albanian alphabets are either completely or partly different from the Latin alphabet that forms the linguistic basis for pupils enrolled in the participating Bosnian schools. They point out that for these pupils "... language barriers and difficulties during the learning of the "official" Bosnian language requires more time, individual support and language material ...". It is likely that some of the other case schools also have pupils with different oral and written first languages, as also occurs in the Norwegian case school (O, S, T).

- d) During the project period, computer programmes and the internet have been increasingly used. This new technology greatly enriches multi-sensory communication support and teaching-learning content, as mentioned above. Learning programmes in pupils' first language, English and mathematics are adopted; thematic flashcards are downloaded; teachers start making illustrations and summarising PowerPoint presentations; films, video snippets and music are used. The new technology offers a wealth of new possibilities for teachers to implement a teaching-learning process adapted to individual variations within the community of the class. However, it also requires that teachers make greater efforts than before to verify if the increasing amount of information is correct as well as take full advantage of the new opportunities for individual adaptation (O, S, SM, T). Compared to using blackboards as the main media for writing notes and examples, there is a great advantage in moving to laptop computers, namely that the teacher can face the class rather than turning his/her back on them. This provides greater opportunities for dialogue, observations and feedback. It does not mean that the black- or whiteboard is outdated, but that its role and importance have changed.
- e) As mentioned, communication with pupils with hearing impairments is in focus (L, SM).

In other research projects there are pupils who need specially adapted communication technologies for other reasons. The Sarajevo team reports that logopedes use special speech devices when working with pupils who have speech chal-

lenges: “This is external support from a special institution in Sarajevo. Pupils either go to the institution that has this special equipment, or the speech therapist comes to the school from time to time” (S).

The seven studies in the research project do not cover all of the rapidly increasing communication technology (<http://www.asha.org/public/speech/disorders/AAC/>). However, several programmes are used in schools for pupils with speech organ disabilities, intellectual challenges and other disabilities or challenges where alternative communication contribute to dialogue as well as language and speech development – with or without a computer connection. Combination of (hand-) signing to speech is widely used in Norwegian kindergarten groups, since almost every group has one or more children who applies this approach as their primary communication form. Several children use this as a means to acquire oral language, and all children use it in their first language acquisition. Among other alternatives are a) the Bliss-sign system (a visual communication system of language symbols with logical pictures instead of letters) and b) simplified icons in picture exchange communication systems (<http://vkc.mc.vanderbilt.edu/ebip/>). A limitation of this multinational comparative research is therefore that no examples of augmentative and alternative communication programmes are represented, since they are practiced in several ordinary schools and are particularly well-suited for studies of inclusive practices. This is one of many aspects that deserve attention in future studies. The Belgrade team draws our attention to the schools’ experience of the time spent on pupils with special educational needs in ordinary classes (B). This indicates the obvious fact that for schools to be able to adapt to pupils’ individual special needs, human resources and upgrading in relevant communication approaches must be channelled into the classroom. Emphasizing both variation and the facilitation of communication means is not only helpful for all pupils in the inclusive class but also completely necessary for some of these pupils.

**Dilemmas and challenges.** Should the choice be made between having a homogenous class of functionally deaf pupils or a mixed class of deaf and hearing pupils? The choice is obvious if little or nothing done to improve the communication between pupils and teachers in mixed classes (L). Parents may be confronted with these kinds of dilemmas. As regards the development of inclusive schools, this raises a challenge. It is also challenging that ordinary teachers do not have the necessary awareness, knowledge and skills to use alternative communication means.

## Communication as human relations

While communication technological issues relate to questions about whether we see and hear each other properly or understand the language/s being used, the human relation aspect of communication is about the ability to be aware of every single fellow human being; to create and maintain a human relationship. This is also called relational pedagogy. According to Rye, research and theory-building during recent decades indicates the following traits in human nature in general and children's development in particular:

- The child has an innate social nature and potential to develop communication and social interaction
- The child has a fundamental need to establish reciprocal social relationships in order to survive, develop physically and socially, and learn to understand and relate to the physical and social world
- The child – particularly in the early years – learns through social interaction with caregivers, who become the child's important mediators and supporters in the process of socialisation and mastery of their relationship to the surrounding world (Rye, 2001; 2005).
- Human relations are based on being seen, listened to and taken seriously (Johnsen, 2014b:164).

This interactive understanding of the child as a communicative being is in contrast to Piaget's developmental theory. While Piaget (1896-1980) argues that a child develops into a social being, his contemporary, Vygotsky (1896-1934), argues that a child is social and communicative from birth onwards, developing because of this trait. With his lifelong studies of the interaction between infant and primary caregivers, Trevarthen (2014) supports Vygotsky's stand and adds research findings about new-borns' innate ability to initiate communication and their need for responsive awareness from their caregiver. Children's need to be heard and seen, as well as to receive, initiate and participate in chats, conversations and dialogue, is expected to be more or less present at school age. Why "more or less"? There may be many reasons why a child's expectations fade when attempting to initiate contact with others. One important reason may be the consequences of long-term neglect. It may also be that teachers and other adults as well as schoolmates fail to notice a child's desire for contact. When a child has problems with attracting attention due to difficulties with the usual oral communication, it is not unusual that a special "language" develops within the child's family (Gardou, 2014). If so, it is crucial for the school and class to

be informed about this. The two previously mentioned reasons, social neglect and communication disabilities, are examples of communicative challenges that may be difficult to reveal. The introverted, silent pupil is often overlooked during the busy school day, even though the school is responsible for making sure that no child experiences being invisible. This is a fundamental inclusive practice. How does the human relation aspect of communication appear in the seven studies? Are schools conscious about the problem of awareness – or that some pupils may be “invisible”?

As a partial answer to the latter question, information is obtained from an innovation project in cooperation with the universities of Tuzla, Sarajevo and Oslo and their project schools, which took place from 2003 to 2005 at the forefront of the current cooperative research project (SØE 06/02, 2002). The project consisted of a series of meetings comprised of a combination of lectures and discussions of practical educational assignments in the participating schools. The cooperation between practitioners and researchers is reported on in Johnsen (2007). One of the assignments was to make a simple screening map for the class and tick for each communication with the pupil. The assumption that one or more of the pupils would get few if any ticks was debated and even contradicted by conscientious teachers. However, at the next meeting, one of the participating teachers wanted to eagerly admit that she had revealed her own misconception:

She told us that she had started (...) the assignment (...) expecting to find that she gave all her pupils more or less the same amount of attention with the exception of a few pupils who got much more of her time. As she was filling out the checklist at the end of each school day according to what she could remember, she discovered that there were 2-3 pupils who got very little attention in her class as well. “It was a shocking discovery”, she told us. But it was also an “a-ha” experience showing her how easily a simple written checklist could help her improve her communication with the whole class (Johnsen, 2007: 274).

How does the human relation aspect of communication appear in the seven studies? Examples of relational aspects of communication between educators and pupils are summarized in the following categories:

- Showing acceptance and appreciation of every individual pupil and the whole class
- Giving ample time in conversation with the pupil
- Waiting for the pupil’s reaction
- Appreciating return information

- Trying to resolve misunderstandings
- Using verbal and nonverbal communication in general and especially with facial expressions
- Striving for insight
- Recognising and accepting the pupil's feelings, needs and individual learning strategies
- Repeating and clarifying instruction in accordance with assumed individual needs
- Giving positive feedback and praise in oral and written form
- Mediating dialogue in the class in order to support the understanding of pupils with hearing impairments and other disabilities (B, L, O, S, SM, T, Z).

The relational aspect also concerns communication between educators at school and external professionals; school administration, special needs educators, teachers and in some cases assistants; resource teams as well as the research teams, not to mention the very important communication between schools and parents. In most of the studies, communication between the adult population is described as close and positive. The Belgrade team has established cooperation with a renowned special school having many years of experience. The school shares their professional knowledge and skills with the ordinary project school. In Sarajevo a special school and resource centre offers logopedic training for some of the focus pupils in the study. In the Tuzla and Sarajevo studies members of the research teams are active educators in the innovation projects within their case schools. Thus, there is a kind of unifying characteristic of the communication as being close and positive among research teams and schools, parents and external competence institutions (B, L, O, S, SM, T, Z). However, it is appropriate to provide two possible modifications of these one-sided positive characteristics.

- a) The great innovative efforts of research teams along with extra project resources add increased opportunities for pupils, parents and schools. This may be one reason for the close and positive relationships. Accordingly, it may indicate an element of funding- or sponsor bias, meaning that these schools may be particularly positive due to their extra resources. This kind of bias has not been discussed seriously within the field of educational research, but is gaining increasing attention within medicine (Krimsky, 2012).
- b) The second modification relates to the process of finding case schools that are willing to participate in classroom studies, which are rather intimate for teachers, pupils and parents. It may be complicated for schools to accept that

their everyday practices are evaluated in detail. Possibly due to this, some teams describe the search for case schools as “incredibly difficult”. For example, it took two years to find a so-called “good school” that was willing to participate in the classroom study (O). Indeed, for other teams it has been necessary to switch schools. The process of finding research schools may therefore contribute to explaining why research teams perceive their relations with their cooperating schools as close and positive (B, O, S, SM, T, Z).

As stated above, the main focus arena of relational communication is within the class. In the following, they are described in three different contexts; as communication with a) the whole class, b) groups and c) individual pupils. As mentioned, the educational staffs consist of ordinary teachers, special needs educators and/or educational assistants.

- a) The Sarajevo team gives the following description of relational communication in the class:

“The teacher communication is practiced in order that each pupil will be seen and heard. The teacher’s dialogue with the whole class takes place in a supportive socio-emotional atmosphere based on the discipline of listening and following rules of communication, where the teacher gives positive feedback and praise through verbal and nonverbal communication” (S).

Other stated characteristics or prerequisites for relational aspects of communication are “clear communication with the entire class”; a multiple focus on the pupils in the class – also in collaboration with teaching assistants; and that it is important for the teacher to “communicate in front of all pupils”. It is emphasized that encouragement is a vital part of relational communication. (S, SM, Z).

- b) Peer cooperation is particularly emphasized by the Sarajevo team. Teachers are encouraged to mediate how to take active part in joint group assignments, share opinions, experiences and knowledge and take responsibility for their part of the group work. Educators remind pupils of group rules, and they contribute to a positive pupil environment. Other teams also describe collaboration between pupils with and without special educational needs, both the diversity of joint activities and relational challenges (B, L, O, S, SM, T, Z).
- c) Most research teams direct the attention specifically on relational communication with individual pupils with special needs (B, L, S, SM, T, Z). How is the relational communication with individual pupils described? Examples

are mainly sought from communication between teacher and single pupil, but also between special needs educators or assistants and individual pupils. Co-teaching and turn taking between teacher and assistant or special needs educator and individual pupils are also described.

Possible effects of relational communication for single pupils in general are pointed out, such as better understanding of the class conversation, more pupil initiative, participation in discussions and learning tasks, increased tolerance of peers and more sincere cooperation. The Belgrade team concludes in the following way:

“The data obtained concerning how pupils with disabilities communicate with teachers and other pupils show a picture of positive relationships and acceptance. In their communication with teachers, pupils with disabilities take an active role: they often initiate conversation, ask their teacher to help them and check whether they have completed tasks correctly. Teachers frequently praise pupils with disabilities for their achievements and verbally encourage them to work on tasks. Furthermore ... they devote a great deal of time to individual guiding these pupils. (...) Along with teachers, other pupils often praise their classmates with disabilities following their presentations. Interaction unrelated to learning is also present among pupils (e.g. chatting). No instances of negative relations, such as quarrels or put-downs, have been noted by the observers (B).

Some teams apply the concept of resource based- or positive communication in their description of relational communication. These are possibly terms inspired from Rye (2001; 2005). Thus, the Sarajevo team reports positive communication based on the attention paid by the teacher to different pupils’ emotional states, specifically focusing on moods and feelings. Through observation, teachers sense when to create opportunities for pupils to express their feelings and thinking and participate in dialogue (S). In their action research the Skopje team presents the following suggestions for positive communication in the teaching-learning process within the classroom, focusing on supporting an individual pupil with cochlea implants:

- Reduce sources of competing noise in the classroom. A sound field amplification system is an excellent tool to address background noise
- Gain the pupil’s auditory attention. Do not tap or wave to get attention
- Write key words, dates and homework assignments on the chalkboard
- Repeat the pupil’s answers to teacher-directed questions
- Preferential seating arrangement

- Ask the pupil to repeat a misunderstood word or phrase
- Prepare lists of vocabulary from subject areas to learn at home
- Highlight new words in each lesson
- Ask the pupil to substitute new words for old – expand vocabulary use in different contexts
- Try to keep your book down when reading aloud. Making eye contact is important for all children
- Try to stand fairly still when talking
- If necessary, institute a buddy system (SM)

The teachers' positive relational communication with single pupils and the whole class in the Norwegian case school is a recurring theme throughout the five years of the longitudinal study. It is identified in classroom observations and discussed with the teachers in open interviews or dialogues. Four categories of positive relational communication stand out in particular; 1) multisensory communication, 2) active listening, 3) dialogue and 4) resource based or positive communication, since a variety of the observed traits may fall under these categories (O).

- 1) While multisensory communication is best characterized as a communication technological aspect, it also has relational aspects. The teachers are repeatedly observed make use of both hearing and sight in their presentation. They present knowledge and messages both orally and in writing, delivering printed information on papers and referring to written texts and pictures. Communicating in a multisensory fashion takes into account the individuals' preferences. Therefore, multisensory communication reaches larger numbers of pupils better depending on teachers' levels of knowledge and sensitivity towards each individual pupil.
- 2) Active listening contributes to creating relationships. It invites pupils to take part in the class conversation. A listening teacher is a model for how pupils learn to listen. This is in accordance with Carla Rinaldi and the Italian Reggio Emilia view on the role of listening in communication:

...any theorization, from the simplest to the most refined, needs to be expressed, to be communicated, and thus to be listened to, in order to exist. It is here we recognize the values and foundations of the "pedagogy of listening" (Rinaldi, 2001:80).

Teachers are repeatedly observed breaking up their teaching by asking questions and looking at whichever pupil is speaking. They are continuously

observed walking around the classroom, talking and listening to individual pupils and groups while the class is working on assignments. Their pupils seem comfortable in contact with them.

- 3) The dialogue is characterised by reciprocity between listening and participating in conversation. It is generally understood as a) a conversation between two or more persons, and b) an exchange of ideas, opinions, particular issues – as a school subject – or concrete, practical topics; with the assumed intention of reaching an amicable agreement or settlement. The educational dialogue mirrors the master-apprentice relationship in the teaching-learning process described by Barbara Rogoff in her early work (1990). The classroom dialogue functions as an important tool for inclusion since it invites pupils on different levels of mastery to demonstrate their problem-solving abilities and at the same time learn from each other. The dialogue is of specific importance for solving psychosocial challenges.
- 4) Resource-based communication focuses on pupils' mastery and proximal zone of development in Vygotskian terminology (1978; 1987). Rye (2001; 2005), and Hundeide (2010) have outlined eight themes for resource-based communication and mediation. Addressing educators, they recommend the following:
  1. To express positive feelings towards the class and individual pupils
  2. To base the dialogue with the pupils on their mastery and interests
  3. To talk with the pupils
  4. To praise and acknowledge the pupils
  5. To help the pupils to focus the attention
  6. To give meaning to the pupils' experience
  7. To explain further details in the pupils' experience
  8. To help the pupils to develop self-regulation and social competence

How do these themes correspond to the practice of the three class teachers (O)? All themes are recognised in observations of the continuous communication between teachers and pupils. The first teacher sums up what communication means to her as follows:

- To understand the pupil
- To be aware that not all pupils have a good time in their class and school environment
- To communicate on the pupil's level

- To try and see all pupils equally well
- To communicate academically, one must be individually adapted (O).

Human relation communication has been given considerable space in this report as an important aspect of inclusive practices. The dialogue between teachers and individual pupils and the whole class is a central part of the teaching-learning process in general, historically documented as a classical educational or didactic method (Brammer, 1838 in Johnsen, 2014b:158). The human relation communication presented here draws our attention to pupils' mastery and abilities. This perspective on the teaching-learning process of pupils with special educational needs is an important factor in the turning of special needs education from focusing what the pupil is not able to do – a “fault finding” and labelling perspective – towards emphasizing the pupil's mastery and opportunities. This turn towards emphasizing the resource-based perspective within special needs education may be seen as a part of the international discourse about the school for all, integration and inclusion.

## Challenges for relational communication

Not all human relations are positive. On the contrary, they may also be negative, as confirmed in the history of education and special education (Johnsen, 2000). In this presentation human relations, or relational communication, that contributes to inclusion is in focus – a kind of relational communication that encompasses the plurality of all pupils' communicative and educational capacities and needs. It concerns the mastery and abilities of every individual pupil in the community of the class, and thus it is based on their resources in interaction with educators. There is a complex set of challenges concerning communication between educators and pupils. The challenges reported are divided in accordance with three characteristics in the presentation below; a) monologue teaching b) error focused communication and c) communication difficulties among educational staff.

- a) The term monologue teaching is used in this presentation to accentuate a distinction between teaching *to* the audience, in other words as one-way communication, and teaching in dialogue with the audience (This is a narrow application of the term, since it is more often used generally about lecturing). Thus, monologue teaching is described here as lecturing without interacting with pupils. It is reported that the term “... monologue is often

used for the traditional way of teaching the whole class or individuals while standing at the catheter". For example, teachers are observed explaining procedures to pupils either orally or by writing them on the blackboard without any kind of further communication or checking if pupils have understood the assignment (S, Z).

- b) Error-focused communication deals with focusing on what pupils cannot manage and, accordingly, negative messages about faulty performance to either the whole class, groups or individuals. Examples of reported observations of error-focused communication are when a teacher's attention focuses solely on pupils' disruptive behaviour. This occurs in cases of negative discipline in the classroom and when class rules are made that all start with "no" or "do not" (S). Since special needs education is often about giving pupils who have different levels of mastery than the majority in the class specially adapted professional support, it is very important to be aware of not focusing attention on what these pupils are not able to, but rather help them "compete with themselves" and be aware of their personal progress. This is a difficult "line dance" requiring a high degree of sensitivity in order to avoid the pitfalls of error-focused communication. Frequent communication of pupils' lack of knowledge instead of their mastery and opportunities can have serious consequences for pupils' self-esteem and thereby general readiness to learn, contributing to their experiencing exclusion instead of inclusion. This error in communication has accompanied education and special needs education throughout history, and, even though not discussed explicitly in the joint report, the participating teams are aware of this fact.
- c) Cooperation- and communication difficulties among a school's educational staff may contribute to challenges such as misunderstandings, delays and poor communication. This may in turn create difficulties for the teaching-learning process in general; it is especially serious for pupils with special educational needs. A frequently occurring difficulty concerns communication between special needs educators or teachers with assistants as well as parents. One reason for this miscommunication may be that assistants do not have sufficient knowledge to fully understand professional educational recommendations. It may also be that these recommendations have not been sufficiently explained. Examples of this are reported; however, once these challenges have been addressed, new knowledge and skills are conveyed to partners involved (S, SM, Z).

## Summary

Communication has gains attention through at the cultural-historical turn towards learning in society, focusing on the following factors:

- Pupils learn through interaction with their fellow human beings and environments
- Language and communication are essential tools in learning and cognitive development
- Teachers, parents and peers may function as mediators and discourse partners in joint teaching and learning processes

Emphasis on communication is evident in the participating research teams, such as:

- Communication with pupils who are functionally deaf or hard of hearing (L, SM)
- Exploration of the role of communication as a contribution to inclusion (B, O)
- Action research concerning pupils with communication impairments (S, SM, T)

Communication in an educational context is divided into the two sub-categories of communication technology and communication as human relation (Johnsen, 2007).

**Communication technology** concerns the following:

- To hear and see each other
- Need for hearing or vision aids
- Need for special and alternative communication media
- Need for systematic support in learning to understand and apply a language

Focus on communicational means in the research reports:

- Adapting to an acceptable level of “working noise” in the classroom
- Maintaining appropriate light in the classroom
- Using hearing and visual adapted aids
- Using multisensory means in communication
- Increasing use of computer-based communication programmes

**Communication as human relations**, also called relational communication, is about the ability to be aware of every single fellow human being as well as create and maintain a human relationship. Examples from the seven studies of

relational communication between educators and pupils are summarized in the following categories:

- Showing acceptance and appreciation of every individual pupil and the whole class
- Giving ample time in conversation with the pupil
- Waiting for the pupil's reaction
- Appreciating return information
- Trying to resolve misunderstandings
- Using verbal and nonverbal communication in general and especially with facial expressions
- Striving for insight
- Recognise and accept the pupil's feelings, needs and individual learning strategies
- Repeating and clarifying instruction in accordance with assumed individual needs
- Giving positive feedback and praise in oral and written form
- Mediating the dialogue in the class in order to support the understanding of pupils with hearing impairment and other disabilities (B, L, O, S, SM, T, Z).

Four categories of *positive relational* communication stand out in particular since a variety of the observed traits may fall under these categories:

- 1) multisensory communication
- 2) active listening
- 3) dialogue
- 4) resource based or positive communication

**Challenges:** There is a complex set of challenges concerning communication between educators and pupils:

- a) monologue teaching; teaching *to* the pupils
- b) error-focused communication
- c) communication difficulties among educational staff

As discussed in this chapter, relational communication is a general professional educational aspect that is highly relevant to interaction with all pupils, and it is of special importance in interacting with pupils who have difficulties and disabilities.

It is fair to say that positive relational communication is comprised of care. Hence, the question arises: Why establish care as another main aspect or area within the curricular relation approach? The next chapter on care begins with a discussion of the concept of care and an argument for its importance to special needs education and inclusion.

## 8 Care

Does communication involve care? The discussion of relational communication and resource-based communication above indicates a connection between communication and care. Why, then, establish care as another main aspect or area of the curricular relation approach? Before arguing for this point, an introductory clarification of the concept of care may be helpful.

In the anthology *Images of Modern Care* (Moderne omsorgsbilder), the editor distinguishes between two forms of care; a) private and informal, and b) public and formal. She characterizes private care as close, warm and empathetic, whereas professionalism, alienation and coldness are described as the hallmarks of public care (Jensen, 1990). What lies behind this unpleasant description of public care? Could it be that this description is associated with only everyday physical and medical care? In the Norwegian context, public care tends to be associated with institutional care of medical patients and elderly. Is this understanding in line with how the term is applied in other countries? The International Council of Nurses' description of nursing reveals the following clarification:

Nursing encompasses autonomous and collaborative care of individuals of all ages, families, groups and communities, sick or well and in all settings. Nursing includes the promotion of health, prevention of illness, and the care of ill, disabled and dying people (International Council of Nurses, 2017).

Similarly, Mitchell and Soule (2008) link care to patient safety and quality care (<https://www.ncbi.nlm.nih.gov/books/NBK2681/>). The stated characterizations of care within nursing seem to support the above suggestion that institutional care is mainly associated with practical aspects of medical professions. Is the term care discussed when it comes to institutionalized education or schooling – and, if so, how is it described? A literature search reveals a description of the role of care pronounced in the School Policy & Advisory Guide of Victoria State Government, Australia. A chapter in the document is entitled, “Duty of Care in the School Policy & Advisory Guide”. Here, the duty of care is described

as: "... to avoid injury of any kind or the absence of negligence that may lead to injury" (Victoria State Government, 2015). The purpose of this focus on care in the educational policy document is declared as being: "To explain the nature of the legal duties owed by teachers and school staff towards students". Here, the term care seems to have a preventive role. Overall, care seems to relate to formal and professional duties; to contribute to the prevention of neglect and fostering of high quality work of relevant professions within health care and education. Accordingly, compared to the dichotomy of the communication discussed in the chapter above, it seems that the term care may also be divided into similar aspects, whereof the formal aspect documented above in this chapter may be labelled "care technology" in line with communication technology.

In her article on educational concern about care in school, Lauvdal (1990) confirms the idea that the term care is used almost synonymously with caring work; thus, it is understood as a term consisting generally of safeguarding the needs of weak groups – almost synonymous with helping. This conceptual description also reminds us of the construction "care technology". It is fair to point out that in current Norwegian discourse, the distinction between public care as alienating and cold and private care as close and warm is about to disappear. Currently, Norwegian political parties talk about the need for more "warm hands" in public care. In this way the current perception of public care work is not only limited to society's formal obligation of taking care of someone, but also involves explicit positive relational aspects. Turning our attention to inclusive practices, the didactic of individual adaptation of teaching-learning processes in the community of the class may be seen as a professional handicraft containing "care technology" as well as human relational care. In her 1990 article Lauvdal turns from her critical discussion to an introduction of American scholar Nel Noddings and her reflections on the relational perspective of care that is discussed in more detail later in this chapter.

What qualities of care justify it as a main aspect and -area of the curricular relation approach? Similar to communication, care represents an extended professional understanding compared to traditional narrow discipline- or knowledge-related education. It emphasises that positive learning depends on the satisfaction of basic human needs (Rye, 2005), including acceptance, belongingness, love, recognition and respect. Therefore, we need to be aware of not only the pupil but also the whole child and adolescent within their own social and cultural context. We also need to be aware of the joint cultural heritage and conditions that we share with our pupils with its potential for joy as well as

barriers and traumas. Having knowledge of and caring for pupils' personal lives and the whole range of their developmental potentials and needs is a challenge for educators. Therefore, taking one of the examples of the seven studies, it is impressive to witness the extensive knowledge an elementary class teacher has of every child in her class and how carefully she handles this sensitive information (Johnsen, 2019b). Our pupils need to be aware that we care about them. It shows in our attitudes, small informal talks, eye contact or a light touch on the shoulder, or saying something nice about their homework as well as telling them about our concerns. Care is reflected in how we plan, implement and evaluate all aspects of the Curricular Relation Approach (Johnsen, 2014b). The main content of care is the relationship between educator and pupil or the educator's resource-based awareness of the pupil. Care is from this perspective a relational phenomenon; as mentioned above, it clearly connects with relational communication, but contains more than communication, namely a positive human mentality, professional perspective and practice permeating all educational actions and reflections. The caring perspective of education includes a) relational communication b) recognition of our joint human vulnerability (Johnsen, 2014d; Kristeva, 2010) and c) Danish scholar Tetler's (2000) "didactics of generosity". Hence, care is a key aspect of inclusion. Concurrently with the introduction of care as a main aspect of the curricular relation approach, a growing interest in care is taking place internationally, referring to humanistic educational philosopher Martin Buber's (1947) texts and with Nel Noddings as a leading scholar; a discourse that is accounted for in more detail in the article *Care and Sensitivity in Upbringing and Education* (Johnsen, 2019a<sup>48</sup>) in this anthology.

How is care manifested and discussed in the seven studies? Findings from interviews and observations indicate that "care has many faces"; it has many expressions and occurs in many different situations and connections. The following presentation starts with findings concerning relations between care and the educational professions, proceeding with characteristics of caring relations: a) focus on the whole child and youth; b) belongingness c) recognition d) supporting pupils' experience of mastery e) supporting expression of feelings f) sharing personal experiences g) encouraging peer cooperation and care h) awareness of the pupil inside and outside the classroom and school, and i) participation in development of coping and mastering strategies. The presentation

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48 For a more detailed discussion of the concepts of care and sensitivity, see the article *Care and Sensitivity in Resource-Based Interaction Traditions within Education and Upbringing* (Johnsen, 2019a) in this anthology.

is followed up with a summary of examples of 1) caring relations with individual pupils, and 2) “classroom care”. Statements about connections between care and worries are discussed before dilemmas and challenges connected to care are presented. The chapter concludes with a discussion of the question: What is the role of care as “an inclusive practice”?

## Care and the educational professions

How do teachers and special needs educators perceive the importance of caring for their pupils individually as well as in a whole class context? One teacher explains: “It is not for nothing teaching is called a ‘caring’ profession” (O). Another argues: “Care is a natural main principle teachers have – also when you’ve been working for many years. My priority for the class is my pupils’ well-being. When I find out that a pupil is feeling rejected, I do something about it” (O). Is care an educator’s duty? One teacher argues that, yes, it is educators’ duty to take the trouble to thoroughly examine a pupil’s relationships both inside and outside school (O). These reflections are in accordance with the informants’ observed practices, which are characterised by their detailed knowledge about each pupil inside and outside their classroom, a knowledge that is updated in cooperation with colleagues, parents and, in some cases, other sources. In the Norwegian case school cooperating about care between teachers is mostly informal and part of their daily routine. It clearly takes place at the beginning of the school day and shows in the teachers’ attitudes when approaching their pupils. It is also regularly observed during breaks when teachers are meeting with colleagues and exchanging information concerning individual pupils’ needs. Most research teams report that they have observed caring relations, and teachers and special needs educators in the projects confirm the idea that care is an important aspect of their professional identity.

### “Not only a pupil, but a complete child”

An overarching characteristic of the care that teachers and special needs educators’ show their pupils indicates a holistic attention to the pupil as an individual human being, member of the class and local society. This is in line with Noddings’ (1992) arguments in one of her early books. She supports the view that pupils are different and that they have different abilities within different areas and live under different conditions. Gardner’s (1993) previously mentioned

postulates about a diversity of “intelligences” also supports this view, as does Befring’s (2001) discussion of the enrichment perspective in his celebration of pupils’ diversity.

What aspects concerning pupils’ life world trigger educators’ caring attention? The Zagreb team points out that teachers’ attention on the single pupil and class goes beyond educational content and academic mastery (Z). Rather, care is about child-centred education, or an extended focus on the child in the context of school and local society. Does this involve all pupils – including pupils with challenges and disabilities? The Belgrade team finds that there is acceptance of pupils with disabilities within regular schools, even though their policy on inclusion is rather new (B). The attitudes of schoolteachers and other school staff towards inclusive education is an important factor influencing the efficacy of the inclusion process and well-being of the children involved (B). In their interview study the Belgrade team asks teachers and principals to describe the attitudes of their fellow teachers and school staff towards inclusive education. Their findings indicate that attitudes vary, usually being most positive among teachers who teach in the lower grades (one to four). They suggest that this difference in attitudes may be related to greater achievement demands in the higher grades. One school principal suggests that “... teachers who have negative attitudes probably need experience in working with pupils with special needs to realize that academic achievement is not the only aim of inclusive education” (B). Teachers and principals are also asked about the attitudes of classmates to pupils with special needs. The majority of informants (20) state that these pupils are well accepted among their peers. They report that other pupils often help them and give them praise and encouragement (B). In the Norwegian case-school, a class teacher is asked: “What kind of knowledge about pupils is important to you?” the answer is: “I focus my attention on whether a child is thriving at school – their overall well-being”. The informant also points out that parents are generally very open and tell the school when their child experiences something is difficult. Another teacher in the same school says that in first grade all the pupils answer a questionnaire called “How do you like being at school?” This is a kind of screening for their sense of well-being (O). After these general descriptions of educators’ overall caring attitude for their pupils, focus turns to more specific aspects.

**Belongingness** in the class and school is about being accepted and appreciated. There are countless stories from literature and real life about excited and happy children going to their first day at school. But, do they develop a sense of belonging in the long run? How does school contribute to this? How does it

avoid having pupils feel rejected? And does it manage to rebuild the perception of belongingness when it is broken? These are broad questions that lend themselves to further research. The issue here is whether the seven studies contribute concrete examples of practices supporting belongingness. Developing all pupils' tolerance and sense of belonging in a class and special focus on one pupil with disabilities is the main goal of an action research study (Z). Organising pupils into small cooperative working groups is also an approach to strengthening pupils' sense of belonging (S).

Observations in the Norwegian case school show many examples of class teachers' acceptance and appreciation in their positive interaction with pupils, such as: a) standing in the doorway, the class teacher shakes hands and makes small talk with every single pupil on Monday mornings b) the teacher takes care of each pupil's practical as well as relational problems when anything comes up; c) the teacher strives for and succeeds in arousing the interest of pupils with learning difficulties in a complex long-term learning task, and d) the teacher stays in the classroom during the breaks chatting with pupils. These are a few of a series of interactions with the intention of strengthening pupils' feeling of belongingness, acceptance and appreciation.

A case example of belongingness within diversity: Along with traditional school subjects, the Norwegian case school applies Armstrong's (2003) theory of multiple intelligences in the classroom during primary school, which is based on Gardner's (1993) ground-breaking theory. This approach produces several positive learning outcomes that contribute to developing belongingness within the class early on in pupils' schooling, specifically its focus on the diversity of pupils' individual mastery levels and abilities as mapped out by fellow classmates. Among the constructed intelligences are 1) musical-rhythmic and harmonic modality, 2) visual-spatial, 3) verbal-linguistic, 4) logical-mathematical, 5) bodily-kinaesthetic, 6) interpersonal 7) intrapersonal, 8) naturalistic and existential modality. Each pupil is described as having two "intelligences" reported as "the most predominant" by each classmate, followed by discussions between them and concluding with the two modalities that were named most often. Observations show that the process is carried out in positive interaction between peers while focusing on one specific classmate, demonstrating interest, acceptance and appreciation and in this way contributing greatly to pupils' feeling of belongingness (O).

**Recognition** includes being seen, heard, respected and trusted. These are key features of relational care and relate to belongingness. The Sarajevo team states that teachers' attitudes towards and trust in pupils' successfully completing their

assignments is crucial when selecting educational methods and strategies (S). They report that teachers participating in continuous professional skills training seem to consider openness, flexibility, care and trust in their pupils of basic importance. However, they also point out that a teacher's personality as well as the context of their school seem to influence their attitudes towards inclusion (S). Are the pupils seen and heard in the participating schools? According to observations made by the Sarajevo team, teachers pay attention to each pupil and listen to what they are talking about, and vice versa. They listen actively and give pupils the necessary time to express themselves. Teachers and special needs educators point out that this is especially important for pupils with language difficulties, since they may need more time, giving several examples of this (S).

Participating schools in former and current Tuzla projects attach great importance to supporting the recognition of each pupil, focusing on those who experience difficulties and have disabilities. Extensive cooperation between researchers and special needs educators, class teachers, parents and school administration are means to securing recognition and belongingness. A former project school in the Tuzla region pays special attention to applying systematic methods to ensure and check that all pupils in the class are seen and heard (T). In the Norwegian case school the dominant teaching-learning method is based on dialogue that focuses on school topics. Does this mean focusing on listening to the pupil or the whole child? Similar to the two Bosnian cases, the explicit goal in the Norwegian case school is to see and listen to the whole child. Securing every young person's well-being is a basic principle. It may, however, be a long way between principles and practice. In what way do schools bridge this gap? The following example shows the step-by-step connection from a "top-down" perspective 1) from the Educational Act; 2) through the school's local curriculum 3) to practice in the classroom:

Step 1) According to the educational Act and National Curriculum, the school for all is obliged to practice individually adapted education and inclusion; care, well-being and belongingness (L 1997; Opplæringslova, 1998).

Step 2) The case school develops annual school curricula with selected priorities within the frames of the national curriculum and sends to all parents. The school clarifies principles of policy papers and provides detailed elaborations, describing how the school intends to practice in accordance with these documents. For example, the school's guide for 2005-06 describes the community of the school as follows: A safe, social community is created through collaboration – shared experiences – care – "to be seen" – focusing on pupils' well-being – secure frames – good routines – tolerance – recognition – and pleasant localities.

Step 3) How do teachers practice these intentions, such as recognising, seeing and hearing the whole child? Several situations and activities are observed and some explained in further detail in interviews. Two of the class teachers are repeatedly observed practicing walking around guiding the pupils while they are working on tasks individually, in couples or groups. Some pupils actively seek help from the teachers – others scarcely. Teachers often bend down in order to establish eye contact with the pupil sitting at their desk (O). These examples are recognised by the participating schools. Other examples are presented in individual presentations of the seven studies (B, L, S, SM, T, Z).

### **Supporting pupils' experience of mastery – promoting self-confidence.**

Care appears in positive, resource-based interaction with pupils (Rye, 2001; 2005). It is visible when a teacher creates a positive teaching-learning atmosphere by developing a feeling of acceptance and safety (Z). Upbringing and education about human rights are important aspects of care and may well be connected to nurturing pupils' positive self-esteem, a sense of group belonging and developing tolerance and acceptance for differences; in other words, placing the child at the centre of the educational process. In the Zagreb case the teacher encourages pupils to express themselves and present assignments in front of the class, concluding by approving the pupil's efforts in front of the other pupils (Z). Pupils' self-confidence is supported through acknowledgement. The Sarajevo team points to examples such as using applause, oral acknowledgement and a pat on the shoulder. This supports pupils' faith in themselves and affirms their feelings of success. Creative educational activities are organised in order to support pupils' social skills development and strengthen their self-esteem and self-confidence (S). These examples are recognised by other research teams (O, SM, T, Z). A number of educational activities aiding pupil's development of independence are applied in the participating schools, aiming at both short-term and long-term results. Short-term results indicate increased independent learning, while long-term results focus on developing learning tools such as skills and abilities that contribute to self-affirmation. Teachers notice that pupils with special needs learn better if they cooperate and are supported by peers. This interaction promotes their feelings of belonging, which in turn increases their self-confidence. Turning our attention towards communication with pupils with speech difficulties, as the above example shows, it is very important to give these pupils extra time and not rush them in dialogue. In this way, teachers also act as good communication models for fellow pupils (S).

**Creating opportunities to express and talk about feelings.** A common criticism of schools is that they are too focused on so-called academic teaching, learning and development taking place through school subjects only. Some would say that this is what school is all about. However, relational care is sensitive to psychosocial learning and development in addition to creating opportunities to express feelings. Within the field of special needs education, it is argued that psychosocial development is an important aspect of human development, depending as it does upon mediation and learning. The level of awareness of psychosocial phenomena depends on the sensitivity and relational care of all caregivers in a child's immediate surroundings, whereof their educators are important key persons. They are models for pupils. Reports from the seven studies confirm that talking about feelings takes place as part of several school subjects related to a variety of activities. A number of traditional school activities are open to encourage this, such as creative activities like drawing, painting, drama and role-play, literature presentation and discussions. Likewise, writing logbooks, autobiographical stories, dialogue books and essays are activities that create opportunities for pupils to express and talk about their feelings both directly and indirectly. The same applies to play, which in many ways is a training ground for psychosocial learning, where children meet friendship and respect as well as sides of human relations such as confrontations, bullying and invisibility. Interviews and observations point to different times of the school day when feelings may be an issue. Thus, the Zagreb team reports that the class teacher encourages pupils to express their feelings and resolve conflicts at the beginning of the school day or after breaks (Z). The Sarajevo team describes how a teacher places all pupils on pillows in a half circle to discuss issues from literary texts or events from their school day. While discussing these topics, the teacher observes the pupils and encourages them to express their thoughts and feelings (S).

**Sharing personal experiences with a single pupil and class** may serve to illustrate educational content as well as encourage talks about feelings in positive as well as negative situations. Throughout the history of schooling and up to today, some teachers have been exceptionally good storytellers. The Zagreb team reports that the class teacher shares her personal life experiences with her pupils (Z). In the Sarajevo team's two case schools, teachers are also observed telling anecdotes from their personal experiences in order to create a supportive socio-emotional atmosphere. They share personal feelings of satisfaction with pupils' work and interest in what pupils write (S). In the Norwegian case school, one

of the teachers is observed using personal experiences in order to make school topics come alive as well as signal her personal feelings related to psychosocial matters. She expresses recognition of individual pupils and the class several times each day – all in a calm, clear and low voice. In order to signal disappointment, she uses so-called “I”-messages, such as: “It made me sad to observe that you made your classmate unhappy. Can we fix this situation? ...” (O).

**Encouraging peer cooperation and care.** Fellow pupils may be of central importance as mediators in the learning process – both academically and psychosocially, as Vygotsky (1978) points out in his famous statement about the proximal zone of development. In one of the Sarajevo team’s case schools, systematic development of peer cooperation has been described and discussed in a Master’s thesis (Dzemidzic, 2007) and developed further. Thus, in their action research the Sarajevo team draws our attention to the role of educators as monitors of peer cooperation organised as group work across academic levels of mastery (S). Focus is on peer cooperation between pupils with and without special educational needs. Monitoring consists of three parallel teaching-learning processes:

- a) Speech therapists give special needs education to pupils with different kinds of speech impairments that consists of speech training and development of self-confidence through their success in solving learning tasks. For example, a pupil who stutters is guided and encouraged to present an assignment in front of the class. The presentation is followed by acknowledgement from both the teacher and classmates.
- b) Educators act as conversational models, showing how to wait and give extra time in the conversational turn taking. In this way, the whole class observes how to take part in dialogue with peers who are stuttering or have other of speech challenges.
- c) Educators monitor peer cooperation across academic levels where school tasks are jointly solved within groups. Thus, pupils with special needs and their peers take part in joint activities and share responsibilities for assignments and thematic study projects (S).

The longitudinal observation and interview study also reveals examples of peer collaboration and care. This does not mean that quarrelling, teasing and even fighting do not take place, especially outside the classroom. However, “teasers and fighters” are also given care (O).

How do pupils show that they care for each other? A few of the observed examples follow here:

- When a boy enters the classroom in the middle of a teaching session distressed because he has missed the bus to his swimming lesson, the teacher takes a break from the teaching to solve his problem – and the whole class follows up and asks him later how things went.
- When one of the pupils is hospitalized yet again due to a chronic illness, the whole class supports her in different ways.
- When classmates apply for and succeed at getting a fellow pupil to participate in a television programme.
- A pupil needs more time and help in the learning process than the majority of the class. She is a bit introverted but eager to learn. One of the popular girls in the class invites her to sit beside her in a permanent seat at her group table.

The last example above illustrates pupil-driven peer collaboration. Interviews and observations confirm organisation of the class is applied to facilitate peer collaboration (O, S).

**Encouragement and participation inside and outside the classroom.** Care for pupils also takes place outside the classroom. Thus, the Sarajevo schools initiate to contact their local community in order to facilitate the development of social programmes for pupils and their families. Local authorities are also made aware of the positive results of inclusion efforts (S). Similarly, the Croatian case school engages voluntary organisations to cooperate with the school, especially organisations for pupils with disabilities (Z). In Norway, teachers or other staff members go out and inspect the schoolyard during recess, two at a time. In the case school two teachers keep a constant lookout in all corners of the large schoolyard. They have reflector vests so that pupils may easily find them. Their task is to be visibly present; to help if someone gets hurt, to solve problems and conflicts between pupils and prevent bullying. Pairs or small groups of pupils are usually observed accompanying these teachers on their inspection rounds. Sometimes the teachers accept pupils' challenge and start to play with them. Thus, it seems that a good deal of relationship building takes place in the schoolyard (O). "Outside the school" is a concept reaching further than to the schoolyard. As reported above, class teachers have in-depth academic and psychosocial knowledge about each of their pupils. They are also aware of pupils' activities outside of school, their interests and concerns, and about conditions at home. They have a close and positive relationship with pupils' parents. When interviewed about their

knowledge, one of the teachers reports that her overall knowledge helps her relate to each one of her pupils (O). Cooperating with parents and sharing information about a pupil's illness, disability or difficulty is also the case in several of the other studies (S, SM, T, Z).

**Supporting pupils to develop positive coping strategies.** Children represent a diversity that implies not only their experience, knowledge, skills and attitudes, their different mastery level and abilities, interests and mentoring needs, but also their worries, fears and traumas (Johnsen, 2014b; 2014d; 2019a). How do educators show care and support for pupils who have experienced disappointment, traumatic events and loss? The Croatian team reports that the class teacher supports and helps pupils who are bothered and offended by disruptive classmates (Z). The Sarajevo team reports that different social programmes and projects supported by local municipalities and NGOs are collaborating with schools in order to support pupils from low-income families as well as pupils who have experienced violence, abuse and what they characterise as socio-pathological behaviour by members of their family or neighbourhood. These programmes include teachers who are educated to provide support for children living in such circumstances (S). The Belgrade team refers to interviews indicating acceptance and care for pupils with disabilities within the regular class and school (B). The three class teachers in the Norwegian case school express knowledge about problems their pupils have inside and outside school in different ways; they demonstrate involvement in their pupils' problems and "walk the extra mile" in order to try out academic and psychosocial solutions for them – and they often succeed (O).

Care is crucial when it comes to trauma and resilience. A trauma may occur when a child perceives being or is seriously threatened; a condition that usually is accompanied by stress, fear and a sense of helplessness. A trauma may be triggered by serious personal or familiar events or by collective events caused by nature or fellow human beings. A pupil's experience of failure, bullying or isolation over a long period may cause trauma. Bell, Limberg and Robinson (2013) warn that schools may be the only thing that can discover when a pupil is traumatized. They have therefore systematised guidelines for recognising trauma in the classroom. Resilience is the ability to recover from setbacks and keep going despite adversity. Children may be said to have resilience when they continue their socioemotional growth in one way or another in spite of difficult and traumatic circumstances. Their "in spite of" trait is also described with the nickname "dandelion children" or the description "developing on rocky ground".

Scholars discuss possible causes for resilience. Do some become “dandelion children” due to inherited traits or triggers in their immediate surroundings? This classical question about “nature or nurture” is not answered here. However, there are numerous stories about one or more persons in the immediate surroundings of a traumatised child that have played a key role in their resilience and development of positive coping strategies. This person has often been a teacher who sees the child. Care is a fundamental factor, as many colleagues in this cooperative project have experienced. What can schools do in order to nurture resilience? Berson and Baggerly (2009) point to three helpful strategies:

- Creating a culture of support in the classroom
- Facilitating expression of feelings
- Building bridges to the community

These recommendations are reminiscent of caring aspects reported by the research teams above. Focusing on children who have lost a parent or sibling, Stokes (2009: 10) points to the importance of the child having a “... secure attachment and positive relationship with at least one competent adult”. She argues that the traumatised child can be helped to develop a resilient mindset through introducing mental tools in order to construct a meaning in their new life situation after loss. School can take on an important role as a safe haven against individual and collective traumas, as a healer of wounds, redirector of negative coping strategies, victimisation and enemy images, and as a promotor of socio-emotional well-being, understanding and creativity (Johnsen, 2005). Care for an individual pupil may certainly be experienced as care for the whole class, thereby contributing to “an atmosphere of care”. However, care for the individual pupil and care for the class may also be seen as two different kinds or aspects of caring, and they may even be based on different goals. The following preliminary summary of examples reported from the research groups is therefore divided in accordance with the two complementary aspects of caring.

## **Examples of caring interaction with individual pupils**

- Care for the single pupil permeates the work with individual educational plans where teachers and special needs educators gather relevant information inside and outside school about the pupil and carry out an as individu-

ally adapted and meaningful high quality educational process as possible. In the case schools detailed individual process assessment and education are carried out in interaction with pupils with special educational needs and their parents (B, O, S, SM, T, Z). This practice may be characterised as academic as well as psychosocial care for the pupil and the whole child.

- Being seen is a fundamental human need. To see, hear and give the individual pupil attention is a caring enterprise. The participating research teams point to how educators take notice of and appreciate the single pupil and demonstrate sensitive and relevant interaction – specifically when it comes to pupils with special needs. Through acting as models while interacting with pupils with special needs, teachers and special needs educators also show fellow pupils in the classroom relevant communication and thus contribute to inclusive interaction in the entire class. “To see” and give pupils attention may be done in different ways:
  - ▶ Greeting every single pupil by shaking their hand at the beginning of the school day affirms a personal relationship
  - ▶ All birthdays are briefly celebrated with singing and congratulations
  - ▶ Responding quickly and appropriately when a pupil suddenly needs extraordinary help is care. Several of the examples are reported in more detail (O, S, SM, T, Z).

Examples of classroom care:

- As happens especially in the lower grades, some pupils may forget their pencil case or books at home. When the class teacher has a reserve of pencils and books that pupils may borrow when needed, this signifies care.
- Class teachers and special needs educators maintain good contact with parents concerning their children’s well-being at school
- Teachers follow up and make sure that classmates do not ignore or hurt their fellow pupils, especially not vulnerable pupils, including those with disabilities and special educational needs (B, L, O, S, SM, T, Z)

**Care and worry:** Educators’ care and dedication for pupils may turn into worry. Their concern relates to academic progress as well as psychosocial and, in some cases, medical conditions – all three concerns that are found in these studies. When it comes to academic progress, worries are reported connected to the lack of or long waiting lists for professional support within specific expert fields, be it educational or psychological, medical or social fields. Schools usually share these concerns with parents. No attempt has been

made in this report to rank concerns in accordance with severity. However, a possible distinction may be made between worries that are experienced as part of professional concern and more serious long-term concerns that go beyond regular professionalism to occupational burnout, which is something that tends to accompany people employed in caregiving professions. As may be recognised, several of the concerns are connected to traumatic conditions. The whole spectre of concerns is found in this comparative study, as indicated in the following examples:

- Educators report that they are aware of large socio-economic differences between pupils in a class and of families that may be in a socio-economic border zone
- Educators report their concerns to the school administration when they suspect that a pupil is suffering from neglect, abuse, or other serious difficulties within their family or neighbourhood. After joint reflections the school administrator may forward the concern to official child welfare services for further contact, investigations and support
- School administrators and educators participate with child welfare services and other childcare institutions in order to create and maintain a safe and sound environment of support for pupils who live in difficult circumstances
- Educators worry about home conditions for specific pupils: For example, a teacher exclaims: “When I learned how many difficulties she had at home, it seemed to me a miracle that she managed so well at school”
- An educator tells about helping a pupil who is isolating himself from school and other activities due to his experiencing difficult conditions over a long period of time
- Educators report having many sleepless nights because of their concerns about individual pupils
- School administrators and educators worry about the sustainability of special needs educational resources when action research projects are concluded.

## Dilemmas and challenges

“It is not for nothing that teaching is called a caring profession, but care and neutrality do not go comfortably together. Professionalism lies in striving to balance care evenly” (O). Repeated feedback and open in-depth interviews with class teacher followed up by further questions over a long period

together with systematic longitudinal observations of classroom interactions strongly indicate that teachers seek and acquire thorough and continuous information about and relation building with each pupil in the class – concerning pupils’ academic and socioemotional mastery and possibilities as well as contextual conditions. The study confirms that every pupil in the class is seen in a variety of ways. The dilemma pointed out by the teacher regarding how to reach all pupils “even-handedly” is, however, classical and most probably “everlasting”. It is a dilemma between educators’ time and priorities and considerations for individual pupils. The Zagreb team has seen the consequence of this dilemma when adding resources in the form of classroom assistants along with special needs educational advisers (Z). Similarly, the Tuzla and Sarajevo teams provide special needs educational resources to the case schools (S, T). Consequently, there is reason to believe that the ordinary teachers have more time to give other pupils attention and care during the project period.

Are all pupils with special educational needs welcomed in the ordinary school? The Belgrade team reports about workshops designed in cooperation with special needs educators aiming to promote acceptance for children with special needs among other children. This is of specific importance, since their inclusion-policy is rather new and ordinary schools have only recently opened up to these pupils. The workshops are mainly reported to be successful. However, one principal and two teachers in one of the participating schools report that although the majority of pupils accept children with special needs, a small number of pupils reject these pupils and express hostility towards them (B). Rejection is the opposite of care. It is a challenge to both pupil’s well-being and the development of inclusion.

The Belgrade team documents a challenge that has attracted attention alongside the development of the school for all and inclusion in all participating countries. It is stated in the media, human rights organisations and unofficial local contexts. The challenge is that the negative mentality towards people with disabilities may be found among teachers, parents and the local community. Julia Kristeva (Johnsen, 2014d; Kristeva, 2010) explains this negative and marginalising mentality in the meeting – or confrontation – between a disabled and “non-disabled”, when the latter spontaneously recognises his or her anxiety of their own vulnerability. Is it possible to “cure” this anxiety and accompanying negative reaction towards disabilities? This is a challenge. However, the Belgrade team indicates that these negative attitudes seem to be more common among

people who are not used to mingling and living with disabled people. Those who have members of the family with disabilities are generally positive – in fact, they love them (Gardou, 2014) – but are often exhausted due to lack of support (Kristeva, 2010).

## Summary

Similar to communication, care represents an extended professional understanding compared to traditionally narrow discipline- or knowledge-related education. It emphasises that positive learning depends on satisfying basic human needs like belongingness, love, acceptance and recognition (Rye, 2005).

Care shows in our attitudes, small informal talks, eye contact or a light touch on the shoulder; in some nice words about what was good about a pupil's homework as well as our concerns. Care is reflected in how we plan, implement and evaluate all aspects in the holistic teaching-learning-development process carried out through the Curricular Relation Approach (Johnsen, 2014b).

Care is a professional and personal relational quality shared in educational and special needs educational traditions focusing on the individual pupil and the class. Nel Noddings' (1992) principle statement acts as a guide for the findings about caring attitudes and actions: "Not only a pupil, but a complete child". Aspects of caring relations are:

- a) belongingness
- b) recognition
- c) supporting pupils' experience of mastery – promoting self-confidence
- d) supporting expression of feelings
- e) sharing personal experiences
- f) encouraging peer cooperation and care
- g) awareness of the pupil inside and outside the classroom
- h) supporting pupils to develop positive coping strategies
- i) caring interactions with individual pupils
- j) examples of classroom care
- k) care and worry

Dilemmas and challenges are discussed, including the questions: Is it possible to "cure" anxiety and negative reactions to disabilities? How can care be evenly balanced?

## 9 Context

As pointed out in the introduction, this international comparative research project is based on eight curricular-didactic arenas or aspects, also described as seven + one aspects. The seven interrelated aspects described and discussed in the chapters above concern: knowledge about the pupil/s – assessment – educational intentions – educational content – methods and classroom organisation – communication – care. Studies of these areas contribute to shedding light on examples of inclusive practices within schools' inner activity, also called internal micro dimensions (Alexander, 2009; Johnsen, 2013a). The eighth aspect – context – is different. What is meant by context in this research project? What does this main aspect contribute to the study? The contextual aspect embraces the inner activity of schooling, connecting teaching-learning activities to larger socio-cultural and recent historical perspectives. It serves to place findings from the educational micro level within the cultural-historical context of the participating communities. In this way, the contextual focus takes the research project beyond former traditions within inclusion studies, where focus has tended to be on either policies and societal factors or isolated classroom studies, as briefly discussed in the joint research plan (Johnsen, 2013a).

How do contextual aspects function as a bridge between schools' inner activity and surrounding conditions on the macro level? Scholars have discussed this connection and suggested ways of systematising this "bridge". Three classical theoretical stands with somewhat different perspectives may contribute to illuminating this connection. Two of them present mainly two-dimensional perspectives in their attempt to imply connections between micro and macro levels through different ecological educational dimensions, whereas the third is explicitly three-dimensional. The two-dimensional theories are presented and discussed in two classical texts published the same year, namely Bronfenbrenner's (1979) ecological framework for human development and Goodlad's (1979) ecological curricular inquiry. Bronfenbrenner develops a systematic construction through dividing impact factors into the following levels or "systems": microsystem, exosystem, mesosystem and macrosystem and additionally – in later texts he adds a third historical level called the chronosystem (Bronfenbrenner, 1994). While Bronfenbrenner has developed societal categories in a broad sense in order to create a system for understanding an individual's development, Goodlad (1979) focuses attention on school. He constructs an ecological curricular terminology with different domains:

- The personal or experiential domain of the pupils together with parents
- The instructional domain of educators; in the context of this research project, concerns teachers and special educators
- The institutional domain contains political-societal and technical-professional activities
- The societal domain covers the formal decision-making institutions from the national to local educational political level.

These domains may be used to describe and discuss 1) educational processes and 2) products. However, "... process and product are so entwined that they can be separated only for conceptual or heuristic purposes; both are domains of praxis" (Goodlad, 1979: 45). Bronfenbrenner and Goodlad's theories may help portray the findings of inclusive micro practices in a wider societal and macro-curricular context. However, according to a three-dimensional perspective, the same inclusive micro activities are also embedded in cultural-historical "dimensions of opportunities", as argued by Vygotsky (1935/1978). The metaphor "three-dimensional" is used here in order to focus on the three contiguous dimensions; 1) schools' present inner activities or practices as illustrated by research findings; 2) societal conditions, and 3) cultural-historical embeddedness. In his main work, *Cultural Psychology – A Once and Future Discipline* (1996), Cole thoroughly develops a line of arguments where he relates Vygotsky's theories to former and current researchers such as Rogoff (1990; 2003) and other post-Vygotskian scholars. According to Rogoff (1990), Vygotsky emphasises that development is a process of learning to use the intellectual tools provided through social history. Thus, so-called 'scaffolding' (Rogoff, 1990; Shvarts & Bakker, 2019), a term frequently used by socio-cultural scholars, consists of finding and adapting the intellectual tools available at any time, be they the pen and inkwell of yesterday or apps (application software) of tomorrow. There is, however, a question whether the concept of scaffolding sufficiently grasps the inner activity of a school in its complexity, and, more specifically, its innovative project towards becoming an inclusive school. Ideas about scaffolding related to tutoring (Shvarts & Bakker, 2019; Wood & Wood, 1996) need to be extended to all interrelated details and aspects in the comprehensive teaching-learning-developmental process. Throughout history, the classical and deeply rooted traditions of didactics and curriculum have contributed to developing, discussing and constructing main aspects that are crucial in order to grasp this extended interrelationship within ordinary educational-, special needs educational and inclusive practices, from where the main aspects of this research

cooperation have been taken. The three classical theoretical stands in Goodlad's, Bronfenbrenner's, and Vygotsky's texts help illustrate the interdependence between different yet compatible perspectives of the seven contextual main aspects of the teaching-learning process on a micro level that are presented by the seven international research teams. Other scholars have shed light on the important role played by educational context. The conceptual and contextual roots of educational activities in the selected scholars' writings originate from several traditions within education and curriculum studies.

- The Bronfenbrenner-Vygotsky traditions may be seen as further developments of Russian pedagogy closely related to European and American traditions
- Goodlad's curricular ecology may be seen as a further development of Dewey's educational thoughts. Instead of following the argument of Dewey's pupil, Hilda Taba's ground-breaking work, *Curriculum Development: Theory and Practice* (1962), he follows her colleague, Ralph Tyler's (1949) more educational-technological argument. Taba and Tyler developed theory and research in the field of curriculum, and Goodlad may be said to have taken the curriculum discourse to a new level through his ecological focus.

Goodlad's clarification of "the many faces of curriculum" serves to enrich cultural-historical perspectives, although he does not refer to Vygotsky's works in his contributions to the anthology *Curricular Inquiry* (1979). Bronfenbrenner and Goodlad pay particular attention to the local school's societal and curricular context, including its opportunities and barriers, called 'frame factors' in the sociology of education. Thus, they argue that school as an institution depends upon and operates within contexts consisting of a number of different factors. Frame factors provide opportunities and directions in addition to setting limits. Therefore, as indicated, context is one of the main areas in the curriculum relation approach, embracing the inner activity of schooling. This is illustrated by placing context as a second circle around the other main areas in the Curricular Relation Model (Johnsen, 2014b). The culture-historical approach and the focus on context are pointed out as a theoretical and research-based main pillar of the joint research plan (Johnsen, 2013a). A fourth scholar plays a key role in this work when it comes to the relationship between the micro and macro level in education. Robin Alexander's works are repeatedly referred to from the beginning of this project in the joint research plan (Johnsen, 2013a) and in several chapters of the report. What character-

ises his contributions to this report? And, how is he situated compared to the three educational traditions mentioned above? To answer the second question first: Alexander's texts show a thorough and far-reaching knowledge of a wide spectre of educational traditions. He demonstrates knowledge of American education and curriculum traditions, referring to Dewey, Taba and Tyler (Alexander, 2000). He seems not to be aware of Goodlad's further development of curriculum theories, but makes use of Bronfenbrenner, Vygotsky and current American scholars within post-Vygotskian discourse such as Michael Cole, Jerome Bruner and James Wertsch. Another scholar of importance in Alexander's writings is British sociologist Basil Bernstein and his writings on the sociology of education (Alexander, 2000). Alexander is noted in the primary school discourse where he draws attention to the lack of emphasis on pedagogy or the knowledge and skills of the act of teaching. He criticises the prominent position of curriculum – meaning national curriculum – in international as well as British discourse at the expense of pedagogy, asking rhetorically “Still no pedagogy?” in one of his articles (Alexander, 2000; 2004). Alexander's texts in the years after his considerable international comparative work, *Culture and Pedagogy*, (2000), is becoming increasingly more explicit, clear and detailed in its discussions of the inner activity of schooling, meaning teaching-learning-development (2004; 2015; 2018). Nevertheless, he is fully aware of the importance of the context that has contributed to school conditions. In *Culture and Pedagogy*, context, structure and control, including an overview of history and national educational structure, are accounted for in each of the six participating countries. He also lends a critical voice to current educational policies internationally and in Britain (2015), strongly indicating the power of context over school for good and bad. Hence, Alexander's texts make important contributions visualising the bridge between the micro level of the internal teaching-learning processes at school and the contextual factors on the macro level. They are also important in the discussion of validity or truthfulness and authenticity of this qualitative international comparative research project, as shown below.

The presentation and discussion of contextual aspects in this text do not follow the same structure as in Alexander's *Culture and Pedagogy*. Contextual aspects are many and complex, and only a few are selected in the following discussions; 1) factors that focus on in the seven participating studies; 2) central factors that contribute to shedding light on similarities and differences between the participating teams. The following aspects are discussed: Common

international principles – European welfare states with different current history – Legislative and political frame factors – Financial resources – Physical frame factors – Human resources and higher education of teachers and special needs educators – Social and cultural aspects.

## Common international principles

The seven universities cooperating in this study share a number of international conventions and principles that are expected to serve as guidelines for national policies and legislation in the six participating countries. The most central of these are UN *Universal Declaration of Human Rights* (1948), UN *Convention on the Rights of Persons with Disabilities* (2006) and UNESCO *Salamanca Statement and Framework for Action on Special Needs Education* (1994). Of these, the UN *Convention on the Rights of Persons with Disabilities* (2006) was signed and ratified by the participating countries:

Bosnia and Herzegovina:	Signed 2007. Ratified 2010
Croatia:	Signed 2007. Ratified 2007
Macedonia:	Signed 2007. Ratified 2011
Norway:	Signed 2006. Ratified 2013
Serbia:	Signed 2007. Ratified 2009
Slovenia:	Signed 2007. Ratified 2008

As an example, the Zagreb team describes how the convention was received and treated.

Croatia is a participant in all major international human rights conventions, which include the rights of people with disabilities and other minority groups. During the pre-accession period ( ... for membership of the European Union ...) Croatia has made steps towards harmonizing its laws and regulations with international and EU standards, leading to some progress in promoting an active policy towards people with disabilities and other minority groups (Z).

The research team argues that the concept of human rights is fundamental for creating an inclusive society (Z). In addition to UN and UN related documents, all participating countries have signed and ratified the Council of Europe's *Convention for the Protection of Human Rights and Fundamental Freedoms* (1950):

Bosnia and Herzegovina:	Signed 2002. Ratified 2002
Croatia:	Signed 1996. Ratified 1997
Macedonia:	Signed 1995. Ratified 1997
Norway:	Signed 1950. Ratified 1952
Serbia:	Signed 2003. Ratified 2004
Slovenia:	Signed 1993. Ratified 1994

These are amongst the conventions and principles forming a common framework as participants in the European and global community and focusing on inclusion. The way international principles are realized nationally in the participating countries is followed up in the sequence on legislative and political frame factors. However, before that, historical dimensions showing what may be called “a gap of opportunities between the northwestern and southeastern outskirts of Europe” (Johnsen, 2013a) are addressed.

## European welfare states with different recent history

History leaves marks on every nation. Historical events may be indicative of national directions. What characterizes European development in recent times? Are there any common features as well as significant differences between the European countries of relevance in this joint research project? In the post-second world war era, Europe went through a fairly rapid development of its economy, infrastructure, official institutions and welfare systems. This was also the case in the north western and south eastern outskirts of Europe in the Nordic countries and former Yugoslavia. The two areas participated in the welfare state development, each in their own way. Since the 1980s, recent history is significantly different. While Norway and other Nordic countries have experienced a peak of prosperity, the other countries participating in this project – Bosnia and Herzegovina, Croatia, Macedonia, Serbia and Slovenia – have lived through dissolution and wars, resulting in serious setbacks to their economy and capacity to provide citizens with welfare services. However, division leads to building national institutions, as seen in the former regions of Yugoslavia, which are now transformed into nation-states. In spite of economic difficulties and a high degree of unemployment, national institutions are developed. The expansion

and development of higher education institutions is of specific relevance for this cooperation. The renewal of former and establishment of new national and local institutions is at the same time inspired by the framework of European and other international principles. Thus, the European Bologna process (The Bologna Declaration, 1999) inspires the rapidly increasing higher education rate. Teacher education has expanded, and special needs education departments and faculties are established, as described in Johnsen, Rapačić, Wagner & Cvitković (2013). When it comes to European cooperation concerning the principles of the school for all and inclusion, the countries with south eastern research teams in this project are among a number of European countries that have been asked to participate in projects related to higher education and research, as possible candidate countries and current members of the European Union (EU) or other forms of cooperative agreements.

Why do countries that have recently been exposed to hostile acts, engage in research cooperation such as this project? This research cooperation (WB 04/06) is a continuation of a previous project comprised of participants from the two Bosnian universities of Sarajevo and Tuzla together with the University of Oslo (SØE 06/02). During this former project, researchers from the two Bosnian universities asked if there was any possibility to finance participation of colleagues from the universities of Zagreb, Belgrade, Ljubljana and Skopje at joint seminars and conferences. The University of Oslo and local Norwegian embassies financed the initial cooperation across the Balkan borders during the previous project. This led to a joint application for the current research project (WB 04/06). During this project, participants have visited their former universities at ambulating workshops on behalf of the research project as well as in other conferences. The two universities in Zagreb and Belgrade have had leading roles in the research and education of special needs educators – or defectologists, as they have been called<sup>49</sup>. Several colleagues from the participating universities have their higher education from either of the two universities and are now participating in creating similar fields of research and education. From an outsider's point of view, when visiting these two universities together with colleagues from all of the research teams, the impression is that there is an

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49 The term Defectology was borrowed from German curative pedagogy and applied in the name of the so-called Defectology Section, established in 1926 at the Pedagogical Faculty, Moscow State University II. Vygotsky was appointed associate director of the faculty from its beginning (Knox & Stevens, 1993). The name Defectology became widespread as several similar institutes and faculties were established throughout eastern European countries.

undercurrent of collegial respect and desire to continue the previous year's academic cooperation and research. This cooperation project (WB 04/06) is thus an opportunity to focus on “regional- internal” comparative analysis between countries in the Western Balkan region with its history of having the same educational policy and governance. It is, however, also of interest to conduct a second comparative analysis between the two outskirts of Europe – the north-west and the southeast – as they have both different recent history and social welfare societies within the European community (Johnsen, 2013a).

## Legislative and political frames

How do the legislative frames for educational inclusion in the participating countries appear? How are they related to common UN- and European principles? There is reason to believe that there are differences as well as similarities between the regional-internal policies in former parts of Yugoslavia and the Nordic countries, more specifically Norway, as a part of this cooperative project.

Starting with the Balkan countries, based on common Yugoslavian laws, regulations and practices related to disabilities, the countries in the Western Balkan region have revised and upgraded their legislation on education for children and youth with special educational needs. The Ljubljana research group points out that following UN and UNESCO principles of human rights, the school system in Slovenia has changed significantly, and pupils with different special needs are integrated in a uniform school system in accordance with Slovenia's new educational laws (Zakon, 2002; 2004). As an example, in 2019 a proposal is presented in favour of incorporating the right to use Slovenian sign language into the Slovenian constitution (L). Development of inclusive school practices in Croatia is advanced with a new law on education in primary and secondary schools (2008) accompanied by a new Pedagogic Standard (2008), (Z). In Serbia the 2009 *Law on the Foundations of the System of Education of the Republic of Serbia* (LFSES), (Zakon o osnovama sistema obrazovanja i vaspitanja, 2009) has brought a range of formal opportunities for opening regular schools for children with disabilities. It has been followed in 2010 and 2013 with laws on preschool, primary and secondary education (B). The two Bosnian teams describe how the right to access in regular schools for children with special needs is regulated by the *Framework Law on Primary and Secondary Education* (2003). The general objective of the law prescribes optimum development of the individual pupil, including those with special needs, according to age, abilities as well as mental

and physical capabilities – in this way ensuring equal opportunities at all levels of education. Accordingly, the law presupposes development of individual programmes for pupils with special educational needs based on assessment of their level of mastery in development and speech (Article 2, 3, 4, 5 & 19). It is fair to say that the national educational Framework Law of Bosnia and Herzegovina has incorporated educational rights stated in UN, UNESCO and the Council of Europe's principles. However, the teams perceive several challenges when it comes to realising what the principle lays out in the Framework Law. A serious challenge concerns the country's having been divided into fourteen cantonal legal systems, each with its own legal system interpreting the Framework Law differently (S, T). The Tuzla team argues that this "... entails legal uncertainty, lack of equal protection of users of all types of assistance, lack of adequate records and criteria for various policies, including policies concerning children with special needs (T). Their view is supported by the Sarajevo team's argument:

The educational system in Bosnia and Herzegovina, apart from being extremely fragmented and expensive, continues to nurture predominant practices that reinforce prejudice, intolerance and isolation of minority groups (S).

As described above, international principles regarding disability rights and development of inclusive education are integrated in educational laws that have been developed in the declared sovereign states of six of the participating research teams. They have common laws and policies of Yugoslavia as their starting point. The new laws were enacted between 2002 and 2013. They seem to support development of special needs education in regular schools and inclusive practices. However, the teams question in different ways whether the relatively general statements are sufficient for guaranteeing development of individually adapted education and corresponding educational inclusion. The Tuzla research team points to several challenges and tasks that need to be addressed in order to bridge the gap between the principles and practice of inclusion. In the following their arguments are sorted according to whether they concern 1) social-political challenges; or 2) topics challenging research and innovation.

1: Arguments for social-political challenges:

- ▶ Commissions composed of only pedagogues and teachers represent a barrier to access to regular school for pupils with special educational needs due to the lack of knowledge and skills of special needs educators
- ▶ In order to implement inclusion, it is necessary to develop monitoring teams consisting of professionals from ordinary schooling, such as

pedagogues and teachers, and special needs educational professionals such as educators-rehabilitators, speech therapists, experts for hearing impairments and social pedagogues

- ▶ There is a need for similar professional teams in on ministry levels
- ▶ In order for inclusion to take place, schools must be allowed to employ professional special needs educators
- ▶ It is important to increase parents' access and participation in the processes of evaluation, decision-making and making recommendations about their children's schooling.

2: Arguments that challenge research and innovation:

- ▶ Uniform and reliable criteria and instruments for assessment are missing. As examples, children with minor socio-cultural difficulties or neglected children are incorrectly classified as children with developmental difficulties
- ▶ There is a lack of sufficient knowledge and skills about individual adapted education
- ▶ There is scarce or no adaptation of school programmes, housing and schooling for children with special needs in ordinary schools.

As an overall argument the Tuzla team points out that according to contemporary opinion, individualisation of instruction is seen as the most important innovative force in the development and modernisation of teaching, or as an imperative of the time in which we live. The essence of individualised instruction consists of a variety of didactic-methodical procedures aimed at meeting the individual needs of each pupil in order to achieve maximum impact on his or her learning and development (T). Other participating teams say that they have also experienced several of the challenges and tasks pointed out by the Tuzla team. The common arguments are a) that there is a serious gap between acceptance of the principle of educational inclusion and practice in all participating countries, b) that further development is in the hands of politicians, and c) that there is a need for research and innovation in order to realise inclusive schools. These challenges also apply to Norway.

What do the legislative frames for educational inclusion in Norway and the Nordic countries look like? It is fair to say that Norway and other Nordic countries were change-makers that led an international movement turning away from segregated schools toward principles of the school for all and inclusion? A turn of mentality took place in many societal areas simultaneously. Parents of children with disabilities were against the segregated schools and institu-

tions for their children. As discussed in Johnsen (2014f), the pioneers, Niels Bank-Mikkelsen from Denmark and Bengt Nirje from Sweden presented a new organisational principle using the notion of normalisation. After their visit to North America, normalisation soon became an international principle. Wolf Wolfensberger at Syracuse University, supported their views and took part in publishing arguments for the idea of normalisation in English language (Bank-Mikkelsen, 1980; Nirje, 1980; Wolfensberger, 1980). Nirje describes the principle in the following way:

Normalization means sharing a normal rhythm of the day, with privacy, activities, and mutual responsibilities; a normal rhythm of the week, with a home to live in, a school or work to go to, and leisure time with a modicum of social interaction; a normal rhythm of the year, with the changing modes and ways of life and of family and community customs as experienced in the different seasons of the year” (1980:32-33).

The formulation of this principle may be seen as a turning point from a segregation ideology towards the principles of integration and inclusion. Norway follows the Nordic trend towards normalisation with regulations about transferring inhabitants from institutions to their home municipalities. When it comes to education, Norway is the Nordic pioneer due to the White Paper (KUF, 1970), where the concept of integration is described by these three principles:

1. Belongingness in a social community
2. Participation in the benefits of the community
3. Joint responsibility for tasks and obligations

It took five years from the publication of the White Paper until the special school act was abolished and all rights for pupils with special educational needs and disabilities were integrated in the *Educational Act* of 1969 (amended in 1975). Thus, the new main principle is that educational matters concerning all children is covered by the same educational act without exception (Act of 1969/75). Currently, the principle applies to kindergarten, elementary, lower- and upper secondary school and to adults who have not completed the lower secondary school level. The terms school for all, integration and – as it is introduced internationally – inclusion are signal words for the principle of all pupils' rights to receive individually adapted education in the community of the class – and, vice versa, that all children are entitled to a school and class that practice inclusion. What does this actually mean? Three main aspects in Norwegian legislation answer this question:

- All children have the right to start their schooling in their local ordinary school
- All children have the right to equally and adapted education in accordance with their individual educational needs in the community of the class
- Special needs education is to be made available to pupils who need specific support in areas beyond the ordinary teachers' competence

Almost fifty years have passed since the publication of the White Paper and the first steps in turning from segregation to a school for all and inclusion. Has the Norwegian school managed to put this change into practice? A fair answer would be that a lot has happened in the move towards inclusion, especially at the kindergarten and elementary school level. Still, there is a serious gap between principles and practice. Another challenge is that except for individual cases that now and then stir up a media debate, the eagerness to create an inclusive society and school seems to fade in official discourse in competition with other agendas.

## Financial resources

Financial resources are the frame factors that get the most attention and complaints. How is the financial situation in the participating countries? Economic resources for additional special needs teaching hours and other flexible measures may (but do not necessarily) contribute to develop inclusive practices. How are the economic resources for special needs education? Statistical figures from the Norwegian school are available to indicate an answer this question. How many pupils receive extra resources due to their documented special educational needs? According to statistics for the school year 2016-2017 from The Norwegian Directorate for Education and Training (Utdanningsdirektoratet, 2016), 7,8% of the pupil population receive additional teaching hours. On average, these pupils receive 790 additional teaching hours distributed over the school year. Additionally, 37 % of all special needs teaching takes place in ordinary classrooms – meaning that 63 % are organised outside the classroom. In addition to guaranteeing documented special education for individual pupils, each school has extra resources for flexible and individually adapted educational measures, such as the reading acquisition courses described in the Norwegian case school. The statistics do not provide further information about how these resources are used. Additional questions are therefore of interest, even though they are not addressed here. How is this additional teaching organised? Who

provides it? What is the relationship between special needs teaching, regular teaching and inclusion like? A general measurement indicating national capacities for financing education and other social welfare services is countries' gross domestic product (GDP). How are the participating countries ranked? According to Eurostat statistics (2016), out of the thirty-eight countries listed, our countries rank as follows:

Norway: No 4

Slovenia: No 20

Croatia: No 31

Macedonia: No 35

Serbia: No 36

Bosnia and Herzegovina: No 37

*(Eurostat, 2016)*

The ranking shows that Norway is amongst the European countries with the highest GDP. The two EU member countries, Slovenia and Croatia, have a rising GDP. While Slovenia has a European average GDP, Macedonia, Serbia and Bosnia and Herzegovina belong for the time being to the European countries with the lowest GDP. What can a country's GDP tell us about the economic frame factors for educational inclusion? Not very much. This is because although GDP may be seen as a general factor of a country's economic and social progress, it does not indicate how benefits are distributed either privately or socially, which is a political issue. However, countries with a high GDP may be expected to spend relatively more financial resources on education.

## Physical frame factors

Physical frame factors may promote or inhibit inclusion. What are physical frame factors? The school building, its surroundings and neighbourhood may be categorised as physical frame factors, or context. The physical framework of schools varies within and between countries. Classrooms may be dark and cold, having doors too narrow for a wheelchair to pass through. The schoolyard may be small and dirty, surrounded by streets with heavy traffic. Buildings may be small and located in safe surroundings, with trees, grass and beautiful flowers as well as ample opportunity for children to play and learn. They may be clean and nice, having rooms of different sizes, tables and chairs adapted to pupils' changing physical sizes, modern teaching equipment and a safe environment.

In some places, the school building functions as the heart of the community; it is a site of education and the area's cultural centre. Caring for the school and providing suitably adapted education for all pupils are highly prioritised by some local politicians, educators and parents. In other places, the opposite may be the situation. Minor changes made to the physical surroundings may decrease or eliminate barriers to learning. For example, a dark classroom may be given more light so that it becomes easier for pupils to read their textbooks and the blackboard. Or, a pupil who is hard of hearing may get a seat so that she or he is able to see the teacher's mouth and facial expressions. New technology developed during recent decades has radically increased schools' possibilities to create flexible and suitably adapted individual curricula in the classroom setting (Johnsen, 2014b). The term universal design is used synonymously with design for all, accessibility for all and inclusive design. It is an important contribution to normalisation as described by Nirje (1980) above. *The Convention on the Rights of Persons with Disabilities*, describes it as follows:

“Universal design” means the design of products, environments, programmes and services to be usable by all people, to the greatest extent possible, without the need for adaptation or specialized design. “Universal design” shall not exclude assistive devices for particular groups of persons with disabilities where this is needed (UN, 2006).

The Norwegian architect Karin J. Buvik has extensive experience in developing universal design of school buildings. Discussing new trends in the physical design of schools, she focuses attention on pupils who need special solutions:

Reduced functional capacity is relative to the environment. It is partly the result of a society that is not adapted to all; a society that creates barriers for some groups of the population. Ideologically, the idea of “a universally designed society” is rooted in political goals. Education is a right and a duty for everyone.

The school needs to be a learning environment that captures everybody. Some have physical impairments that require more space. Some need access to retreat. However, it is no longer seen as desirable to take single pupils out of their home areas. It must therefore be possible to organise the teaching-learning area in accordance with different learning tasks and educational methods at the same time – both quiet and noisy activities. Switching between practical and theoretical tasks should be easy to implement. In each main area there should be at least one work area designed for pupils with special needs for physical adaptation (Buvik, 2005: 110. Translated from Norwegian by B. H. Johnsen).

When the first generation Norwegian universal design standards for buildings were introduced, they centred on the following themes (Standard Norge, 2009):

- motion
- sight
- hearing
- cognitive ability
- environment / hypersensitivity

Adapting a physical context for a pupil with special needs may be a complex task depending upon interdisciplinary collaboration, such as the one between the school administration, class teacher, special needs educator with a specialisation in augmentative communication and data technology, physical doctor and physiotherapist, parents, and – first and foremost – the pupil. Individual adaptation of physical frames may consist of building a ramp for wheelchairs or organising a possibility for an individual pupil to retreat to a part of the classroom or a suitable adjoining room.

Physical context and frame factors have not gotten a great deal of attention in this research project, as school's educational activities in the teaching-learning process have been mainly in focus. The Norwegian case may serve as an illustration of physical frames in changing times, since during the five-year longitudinal study, the participating school has changed buildings. Teachers and pupils have moved from a late nineteenth-century building with extension from the 1960s to a brand new building fulfilling the physical design recommended by Buvik (2005). Does the new school building function better for pupils with special needs, for instance the pupil with attention deficit disorder? Not necessarily. This is because even though it was not up to date, the old school provided enough space for this pupil when he needed to be shielded from interferences. However, the combination of a spacious classroom having several group rooms in different sizes and with transparent glass walls promotes more organisational flexibility. As examples, a) the class teacher has an overview of all pupils even when some of them move to smaller rooms for group work, b) a second-language pupil may go to Norwegian language instruction in one of the group rooms near the classroom, c) a group may rehearse a song presentation without disturbing other working groups. The examples illustrate Buvik's (2005) recommendation quoted above of creating possibilities to switch tasks that are quiet and noisy at the same time for different groups or individuals. It is also an important point that these activities take place in different rooms

without disturbing pupils' sense of belonging to the class. The new building is designed for mobility for wheelchair and other physical and technical adaptations. However, the longitudinal study shows that the organisational needs of the case class are also taken care of in the old school building. The Norwegian case school probably contains both the oldest and newest of the project's participating school buildings, even though no concrete comparison is done. From school visits arranged during the ambulating research seminars, the impression is that although the school buildings representing the research teams are traditional, somewhat similar and not quite new, challenges related to meeting any necessary physical conditions are solved. School administrators, teachers and special needs educators are necessary partners when new school buildings are constructed as professional guardians of the buildings' psychosocial, educational and inclusive functions. Disability organisations are important collaborators here, as are parent organisations.

## **Personal and professional human resources**

Several social groups have initiated and developed principles and practices of inclusion. Parent organisations and politicians are amongst them. In the Norwegian context, newly established parent organisations (NGOs) in the nineteen sixties and seventies were joined by an increasing number of politicians and journalists (!) in public debates about providing adequate conditions for children with disabilities. It was an anti-centralisation debate, arguing for downsizing central institutions and increase local service for their children – including a local school for all. Teachers and special needs educators were, however, divided in their views. Laws and national curricula guaranteed a school for all, individually adapted education and inclusion, as briefly described in Johnsen (2014d). There is, however, still a gap between principles and practice. Today several parents are so disappointed with the lack of public support that some even question the idea about normalisation and a society for all. But, when it comes to practical solutions, parents have been and are pioneers in NGOs and the private world of the families (O). The number of NGOs supporting disability groups has increased greatly in all the cooperating countries and members take part in voluntary work with enthusiasm.

Professional quality is a key element in the development towards an inclusive school. The prevalence of qualified teachers and special needs educators as well as the quality and perspective of their education are important frame

factors. The process of moving from the principle to reality of an inclusive school needs strong professional advocacy and solid skills, flexibility and creativity in the craft and art of educating. Consequently, educators of regular teachers and special needs educators have a great responsibility when it comes to preparing future professionals for adapting schools and classes for all children – with and without special needs. The same is the case for research and research policy (Johnsen, 2014b). Teachers and special needs educators are the most important professional groups in the development of educational inclusion. Johnsen, Rapaić, Wagner & Cvitković (2013) describe and discuss the establishing and development the higher education of teachers and defectologists or special needs educators as well as doctoral studies. The focus of this article is on the regional-internal development of the participating universities in the Western Balkan countries, whereof five universities are represented with special needs education and one with teacher education. The following section presents a summary of this article. In addition, there is a brief account of teacher- and special needs education in Norway with a discussion of the role of special needs education and individually adapted education in the school for all.

How and when has special needs education been established as a discipline for study and research in the participating Western Balkan countries? It may be divided into two periods; 1) in the Yugoslavian era, and 2) after the country's division into several states with a simultaneously rapid increase in global interaction, including participating in UN-, Council of Europe and other international organisations. 1) The first education in special education, or defectology, was established in 1926 and developed into a faculty at the University of Belgrade. In 1962 the same field was established at the University of Zagreb. With the division of Yugoslavia into independent states, there was a need to develop higher education systems in several disciplines, including special needs education. Thus, the University of Belgrade supported Ss. Cyril and Methodius University of Skopje, whereas the University of Zagreb supported the University in Ljubljana and Tuzla. Hence, several special needs educators and founders of the new faculties are educated at the universities of Belgrade and Zagreb. The participating teacher education is located at the University of Sarajevo. Building on early roots, the establishment of Akademija Pedagoška in 1946 marked the significance of schooling, as it was one of the first modern educational institutions in Sarajevo. It has developed into to a four-year study programme that provides students with the opportunity to pursue specialised studies and merged with

the University of Sarajevo into the Faculty of Education. The history of Norwegian teacher education has several similarities with its Bosnian partner. As the roots of the Bosnian elementary school are found in religion, so it is in Norway. When the elementary school “for all and everybody” was established by Royal Decree in 1739, the responsibility for it was given to the church; thus, clerics were responsible for children’s schooling, including hiring schoolmasters with a sufficient level of academic knowledge. Regular formal teacher education was not established until 1826. Through the years the number of so-called “teacher seminars” increased until these seminars were extended to four years in length and upgraded to the level of higher education in 1975. An overview of 1983-1984 school year documents that there were 20 teacher education institutions at that time. Out of these, 14 institutions offered a one-year study programme in special education, either on campus or off (Statistical overview in Johnsen, 1985:19). The first “act on the education of abnormal children”, as it was called at that time (Indst., 1881) pointed out that educating teachers for children with special educational needs was to be based on teacher education, which was fulfilled with the establishment of a study programme in 1961. Similar to comparable Western Balkan study programmes, the Norwegian programme covered all main areas of disabilities and special educational needs – from reading difficulties to profound intellectual challenges. The Postgraduate College of Special Education, as it was called, was observed by the Organisation of Economic Co-Operation and Development (OECD) and characterised as follows:

The status of those who conduct the course is high. It would be difficult to find an establishment comparable with the Norwegian Postgraduate College of Special Education Baerum, with a staff and facilities regarded as of university standing (OECD, 1985).

As a pioneer, the Postgraduate College supported the previously mentioned teacher education institutions in their development of special education programmes around the country. It also provided staff development courses and established the first Norwegian doctoral degree in the field of education, a Dr. Scient in special needs education. Currently, it has merged with the University of Oslo as the Department of Special Education (Johnsen, 2001b; 2013c). Why did special education become so central, as the number of additional programmes in connection with the teacher education institutions show? As mentioned above, the movement in the 1970s represents a turn from the traditional segregation of people with disabilities towards an increasing awareness of the need for all Norwegian citizens to be included in the normalised

society and school for all. The need for educated professionals was apparent, and this resulted in the fast-growing higher education programmes in special education. Following UNESCO's Salamanca Declaration (1994) the concept of special needs education was adopted for the field.

Quantity in education is necessary but not sufficient. How does the quality of education correspond with the aims of normalization and integration of all citizens – later consolidated with the principle of social and educational inclusion (UNESCO, 1994)? Since schools' ability to provide individually adapted education and inclusion depends on cooperation between ordinary teachers and special needs educators, the question is whether educational inclusion has a central role in the education of both teachers and special needs educators. Following the Norwegian example, the curriculum of the teacher education institutions has a common frame or plan according to which individual adaptation of teaching is understood as a matter of didactics and consequently expected to be taught as part of each school subject. Has this goal been realized and become a tradition? Two evaluations of the efficiency of this principle (Norwegian Agency for Quality Assurance in Education (NOKUT), 2002; 2006) indicate strongly that the principle has only been practiced to a minor degree. The later evaluation states "... knowledge and trying out relevant models of adapted education in primary school should be a comprehensive subject of general teacher education to a far greater extent than today" (NOKUT, 2006:15). It seems that the same challenge concerning individually adapted education – and consequently inclusive education – is pinpointed in the NOKUT reports in 2006, as happened in 2002. It is therefore reasonable to ask how the subject didactics in teacher education is organised. Do lecturers in the different subjects have sufficient knowledge and skills to convey professional knowledge about development of individual curricula within their school subject to future teachers? And do they have the professional interest necessary to teach this didactic aspect of their subject – or are they more occupied with teaching about the school subject only? These questions reflect crucial dilemmas in how teacher education is organised in Norway – and possibly also in other countries (?) How, then, does the special needs education research community relate to the role of individually adapted education and inclusion in the teacher? The Research Council of Norway recently published an expert report; *Education and Research in Special Needs Education – the Way Forward* (2014); commissioned by the Ministry of Education and Research. The report contains an evaluation of and recommendations about how the future higher education of teachers and special needs

educators should be organised in Norway. A number of recommendations are presented that focus on all levels of teacher education. They seem to support the concerns stated in the 2006 evaluation (NOKUT, 2006). The following statement is characteristic of these recommendations:

School subjects, subject didactics and special needs education topics should be integrated to a greater degree than they are today so that the connection between the different themes becomes clearer (The Research Council of Norway, 2014:14).

When it comes to the Bachelor level in special needs education, the following two dimensions recommended by the expert group focus on individually adapted education and inclusion, namely that the education should:

- ... contain the topics of prevention, individually adapted education, inclusion and early intervention, providing a broad field of competence.
- ... provide competence in assessment and clarification from an individual- and system perspective, as well as insight into the development of individual curricula and individual plans (The Research Council of Norway 2014:15).

In-depth knowledge in developing individual curricula and inclusion is not mentioned in recommendations for Master-level education in general or related to the topics of special needs education. This brief review of education in individual curriculum work points to serious shortcomings in higher education of special needs educators in Norway. It seems obvious to follow up these evaluations, and it would be interesting and relevant to implement similar evaluation studies in other countries for international comparison.

## Social and cultural aspects

There is a whole range of social and cultural frame factors, or contextual aspects, influencing a school's inner activity. Some of them are already mentioned. Bronfenbrenner (1979; 1994) lays the theoretical foundation for an overview of social and economic structures in the local community, with its employment situation and natural environment as important influential factors for learning. His ecological systems theory links the single person to family and local community with its diversity of internal connections as well as connections to the wider society, the state, country, or even international society and, in more current texts, to the historical dimension as well. Bronfenbrenner's ecological theory had a major influence on Norwegian national curriculum in the 1980s, when it

was highly criticised by spokesmen from decentralized areas, fishing- and agricultural communities, as being biased in favour of urban communities (Johnsen, 2014b). The criticism was heard. The national curriculum of 1987 (M 1987) requires that each local community adapts the national framework curriculum to local conditions, such as the Norwegian case school does in its annual “school curriculum” that is based on teachers’ joint discussions, and distributed to all families. These requirements represent a breakthrough in official Norwegian curriculum development, paving the way for acceptance of the principle of meaningful and suitably adapted individual curricula.

While Bronfenbrenner’s (1979; 1994) ecological approach might sum up a broad picture of social and cultural aspects, a smaller picture or pictures may be characterised as aspects of mentalities related to educational inclusion. Attitudes and mentalities are important “drivers” of social and cultural processes for better or worse. Ethnographic studies of attitudes towards inclusion have not been a focus of this research project, but may be an important contribution to deepen our understanding of these processes. The main content of this international comparative research report is about good examples of inclusive practices, and less good, but also about their dilemmas and challenges, as discussed below. It shows research teams, schools, parents and pupils who enthusiastically participate in the studies and developments towards this rather new international principle of educational inclusion. This is a recognisable enthusiasm that usually accompanies new ideas perceived as being fair and important by many citizens; especially parents and individuals with special educational needs and disabilities (Gardou, 2014). It creates a wave of positive mentality. Since these studies focus on good examples of inclusive practices, the selection of cases is biased in the sense that having a deliberate and positive attitude towards development of inclusion is a prerequisite. Therefore, even though the studies are critical and reveal dilemmas and challenges, several challenges are expected to be excluded in the process of purposeful selection of cases. However, the selection process itself may reveal alternative views to inclusion. There is also a mentality denying social and educational inclusion – and a mentality of ignorance of the idea, as discussed by Julia Kristeva (in Johnsen, 2014d). What kinds of dilemmas and challenges appears in connection with the preparation of this study?

Some of the participating teams have experienced avoidance to participate in this study of inclusive practices from either school authorities or – when they are positive – from school administrators, teachers or parents. There are several reasons given or perceived for avoidance, such as research

overload in a school, sudden and serious economic cutbacks, teachers who are afraid of having researchers closely following their work, worries about disrupting the teaching-learning process or parents who resist research in their children's class and school – or a combination of these and other reasons. These are often understandable reasons for not participating by what are, generally speaking, good schools. It may also be that the research teams have not adequately prepared their invitation. However, when schools avoid participating, this may indicate that developing inclusive practices is not a high priority for them.

Mentality towards social and educational inclusion may contain not only ignorance or denial, but also insecurity. One reason that a school may withdraw from participating may be a lack of knowledge about a country's laws and regulations or insecurity concerning how to implement the principle. While this is understandable in Bosnia and Herzegovina, Croatia, Macedonia, Slovenia and Serbia where the legislation may still be characterised as rather new, it is more difficult to accept in Norway, where the turn towards creating a school for all and inclusion took place around fifty years ago. Mentalities of ignorance and insecurity may, however, also arise when a school or municipality are caught up in superficial traditions that prevent their making fundamental changes in order to move forward towards educational inclusion, as some examples indicate in Norway (yet another theme for further research). Insecurity may also arise if and when otherwise influential parents resist and complain about their child having to share a classroom with a pupil with special educational needs "taking a lot of time away from educating their own child". This argument is also reported by other of the research teams. The principle of inclusion may collide with traditional attitudes related to what education is for – in society at large as well as among parents and teachers (Skogen, 2001; 2019) The Tuzla team argues:

We can say that society places too high criteria and tasks which are too demanding on the child; which are never in accordance with the child's abilities and capabilities. Therefore, the difficulties facing the child cannot be seen in isolation from the context in which they occur (T).

However, within the multitude of different attitudes there are single persons, parents of disabled children, adults with disabilities, professionals such as teachers, special needs educators and others, who urge development of educational inclusion within an inclusive society, as the research projects document. In addition to

researchers and professionals, a large number and variety of non-governmental organisations are active in Europe and in all the countries participating in this research project. Thus, governmental institutions and non-governmental organisations (NGOs) demonstrate a positive belief in the principles of inclusion and actively debate, support and work towards development in this direction. As one of the examples from this cooperative research, the Zagreb team's research provides an example of cooperation between researchers, school and NGOs.

Only some of the many intertwined contextual factors influencing school in general and the development of inclusive educational practices in particular are mentioned here. The review may be regarded as a sketch that outlines macro-level frame factors. Contextual aspects that promote as well as inhibit inclusive practices are mentioned; actually, the focus has been more on challenges than in previous chapters. The following topics are discussed; common international principles – the participating countries' embeddedness as European welfare states with different recent history – financial resources or frame factors – physical frame factors – personal and professional human resources – social and cultural aspects. Thus, without going far back in history, some current historical conditions are presented that indicate a certain number of similarities and distinct differences related to opportunities to develop inclusive practices. Sharing international and European principles of a school for all and inclusion is the joint starting point for all six participating countries and the foundation for this research project. Some general financial, professional-educational, human and cultural aspects and reflections of importance for educational inclusion are outlined, partly discussed and related to opportunities and obstacles in what Goodlad (1979) calls the domains of practice, which is the process and product of education.

## Summary

“The scholarly roots” to the discussions of micro-macro perspectives and contextual frame factors as bridges between principles and practice in this text are Vygotsky, Bronfenbrenner, Goodlad and Alexander. The following main aspects are highlighted:

**Common international principles.** All main UN and UNESCO conventions and statements of specific importance for the principle of individually adapted and inclusive education are signed and ratified by all participating countries, including the most recent UN *Convention on the Rights of Persons with Disabilities* (2006).

**European welfare states with different recent history:**

- Historically, the post-World-War Nordic countries and Yugoslavia participated in welfare state development, each in its own way
- While the Nordic countries have experienced a peak of prosperity, the former Yugoslavian countries in the research project have lived through dissolution and wars. As a result, they have suffered not only serious setbacks to their economy and capacity to provide their citizens with welfare services, but also a subsequent renewal of former establishments and new national and local institutions inspired by common European networks
- This cooperative research project (WB 04/06) is an opportunity to build on collegial respect and a desire to continue the previous year's academic cooperation and research in a "regional- internal" comparative analysis between countries in the Western Balkan region, maintaining a view of them and Norway as being joint participants in the community of Europe.

**Legislative and political frame factors:** All participating countries currently have legislation that either requires or allows for children with challenges and disabilities to attend ordinary schools. The first steps towards realising inclusion have been taken. According to participants, there is need for further clarification of laws and policies. Even where the legislation and national curriculum are explicit, there are gaps between official rights and the actual practice of inclusion.

**Financial resources:** A general factor indicating national capacities to finance education and welfare services is a country's gross domestic product (GDP), as indicated in this section.

**Physical frame factors** may promote or inhibit inclusion at school. The term universal design is used synonymously with design for all, accessibility for all and inclusive design. *The Convention on the Rights of Persons with Disabilities* describes inclusive or universal design (UN, 2006) as follows:

"Universal design" means the design of products, environments, programmes and services to be usable by all people, to the greatest extent possible, without the need for adaptation or specialized design. "Universal design" shall not exclude assistive devices for particular groups of persons with disabilities where this is needed (UN, 2006).

The first generation of Norwegian universal design standards for buildings is edited around the following aspects (Standard Norge, 2009): motion –

sight – hearing – cognitive ability – environment / hypersensitivity. Systematic information about universal design in all participating schools has not been gathered, but a certain amount of information is used as illustrative examples.

**Human resources and higher education of teachers and special needs educators:** This section contains the following aspects:

- Contribution of parents to the school for all and inclusion
- Contribution of NGOs in several countries to the school for all and inclusion
- The central role of international organisations such as UN and UNESCO for the introduction and ratification of the principle of inclusion
- The central role of higher education for teachers and special needs educators in inclusive practices
- The important role of research on inclusive practices
- Establishing and upgrading towards providing higher education for teachers and defectologists/special needs educators: See Johnsen, Rapaić, Wagner & Cvitković (2013)
- Gap between policies and practice of inclusion in all participating countries
- An example: Norwegian evaluation studies of teacher education on the topic of individually adapted teaching
- Need for further similar evaluation studies in Norway – and in other European countries?

**Social and cultural aspects:** Vygotsky's culture-historical theory, Goodlad's curricular ecology and Bronfenbrenner's ecological systems theory all emphasise the influence of social and cultural aspects on policies and national curricula – and their theories may contribute to official debate leading to changes, as the example from Norway in the 1980s.

**Negative and positive mentalities towards the inclusive school:**

Negative attitudes/mentalities:

- Could certain schools' avoidance of participating in studies of inclusion indicate that development of inclusive practices is not a high priority?
- Mentalities of ignorance and insecurity may also arise when a school or municipality are caught up in superficial traditions that prevent their making fundamental changes in order to move forward towards educational inclusion

Positive attitudes/mentalities:

- Within the multitude of different attitudes there are single persons, parents of disabled children, adults with disabilities, professionals such as teachers, special needs educators and others who urge the development of educational inclusion within an inclusive society
- Governmental institutions and non-governmental organisations (NGOs) demonstrate positive beliefs in the principles of inclusion and actively debate, support and work towards development in this direction

These brief descriptions and examples indicate that socio-cultural contexts consist of many vague as well as clear and concrete aspects. Some are even quantifiable, such as economic factors or the number of qualified educators. Other are more diffuse and difficult to detect, while several aspects remain undiscovered as hidden frame factors. Some factors are subjected to official debate on the macro level and may influence changes in policies and priorities – and may in turn have actual consequences for the single school and educational team in the planning, practice and further development of local and individual curricula.

Without going far back in history, conditions are presented in this chapter that indicate similarities as well as distinct differences related to opportunities to develop inclusive practices in the participating countries. Sharing international and European principles of a school for all and inclusion is the joint starting point and foundation for this international comparative research project. Some general financial, professional educational, human and cultural aspects and reflections of importance for educational inclusion are highlighted for discussions and related to opportunities and obstacles in what Goodlad (1979) calls the domains of practice, which are the process and product of education.

## 10 Summary of jointly reported findings

The reported findings are rightfully called empirical examples. All in all, the seven studies contain a considerable number of findings in fine-masked details. The findings are gathered through classroom observation and interviews, action research as well as pre-post studies. They are selected, categorised, discussed and presented in this report by each of the seven research teams and revised

in a series of collective reviews as described in the chapter on methodological considerations below. The joint research question or -issue is:

How does school teach in accordance with pupils' different levels of mastery and needs for support in the learning process (recourses, barriers and dilemmas)?

This summary of findings is divided in accordance the eight didactic-curricular areas and follow in the same order as the chapters above, starting with a summary of findings related to the educators knowledge about their pupils.

## **Knowledge about the individual pupil and pupils**

The focus on relevant and thorough knowledge about each individual pupil in the community of the class concerns schools' attention and the human-professional capacity for holistic and empathetic observation of and interaction with each pupil and the class as a whole.

**Who are the pupils in focus in these studies?** According to information from the research teams, gathering knowledge about individual pupils a) either focuses on pupils with some kind of special educational needs, b) or on all pupils in the class and their individual level of mastery, contextual conditions and needs for educational and other support.

**Who seeks and has knowledge about the pupil/s?** Cooperation between ordinary teachers and special needs educators is found to be central but varying. In the majority of the studies, special needs educators have the role of external advisors or counsellors, and the proximity of their contact with teachers and parents varies. An assumption from the study is that schools focus differently on getting to know a pupil, as this process depends on a) the attitudes their teachers, school administrators and special needs educators have, and b) the amount of attention and time they have to complete this process. There are examples of teachers who show a great willingness to learn about all relevant aspects of all pupils' psychosocial- and learning opportunities.

**What kind of knowledge is in focus?** "I emphasize wellbeing ... that the child thrives" (O). Psychosocial opportunities and challenges are generally found to be the focus of teachers' attention. Having knowledge about pupils who need learning tasks that are above ordinary teaching on their grade level is also reported. When it comes to pupils, who need specific support related

to some or all of their school subjects, teachers' knowledge about their level of mastery and concrete mediating support is emphasised. In addition to diverse knowledge gathered by teachers, often in cooperation with parents, in-depth specialised assessments are administered, most often by external special needs educators. Assessment represents a more systematic type of information gathering.

## Assessment

What is assessment in an educational context? This study applies the following preconception:

To assess and evaluate is to gather, interpret and reflect on a variety of information in order to adjust the direction towards a future goal. Educational assessment and evaluation consist of considerations and judgements about teaching and learning environments, processes and results, and about their contextual relations. Special needs educational assessment and evaluation draw attention to specific possibilities, barriers and adaptations concerning teaching and learning environments, processes and results, and their contextual relations (Johnsen, 2014b: 146).

In line with this description, it is important to have thorough information about the single pupil and all pupils in the community of the class as well as knowledge about the interrelation with other didactic-curricular aspects of the teaching-learning process. In this international comparative research, assessment practices are described in their relation to inclusive educational practice, as indicated by the Zagreb team:

The most important thing for a good assessment is to develop an individual approach in teaching and supporting children. The focus of educational intentions should be on the achievement of every child based on acceptance and support of diversities in accordance with contextual factors (Z).

**Who assesses?** The large majority of assessments are done by teachers, both class- and individual assessments. However, as mentioned, other professionals inside and outside of the school also administer and interpret assessments. Different countries have different institutions administering their assessment of special needs. Thus, in this study assessment and evaluation take place on the school level and external special needs education level. However, in some of these studies, special needs educators on behalf of the study administer thorough assessments of pupils with specific needs as part of “pre-post” and action

research studies. Other studies are delimited to empirical studies of applied practice. Cooperation takes place between regular teachers, internal and external special needs educators and, in some cases, other professionals and supporting institutions.

**Who is assessed?** The individual pupil with special needs is at the centre of assessment in several of the studies. Some of the assessments also focus on how classmates perceive fellow classmates with special needs, such as in a case with a pupil whose behavioural challenges are in focus. In the Ljubljana study attention is given to the perception of a pupil with hearing impairment regarding his interaction with hearing fellow pupils (L). Other studies focus on schools' assessment of all pupils in the class, including cooperating with different external services in accordance with the needs of individual pupils.

**What kinds of assessment are applied to individual pupils?** There is considerable variation between the research teams when it comes to their assessment tools and approaches. The following types are found: a) direct information gathering about single pupils' level of mastery in different areas and school subjects; b) everyday talks with individual pupils; c) systematic dialogues and interviews with pupils, parents and/or co-teachers; d) examination of the pupil's school work; e) portfolios of learning tasks; e) mastery of weekly curricula or plans and programmes; f) the pupil's self-evaluation; g) specific achievement tests and ability tests; h) diagnostic tests administered by special needs educators related to specific functions and needs; i) teachers' and special needs educators' evaluation of connections between plans and practices through the use of logbooks and reports.

**What kinds of assessment are applied to classes and groups?** Many class assessment tools are "classical" and used with some variations in all schools participating in the joint study, such as a) class tests in different school subjects b) school- and grade tests c) national and international tests d) informal and frequently repeated tests e) assessment based on observation, and f) pupils' works. Less frequently, some of the participating schools use g) assessments of pupils' logbooks or diaries h) checklists i) screening tests of abilities and tests of mastery and teaching needs related to specific school subjects such as "school beginning tests" in arithmetic after summer holidays.

**Assessment of curricula.** As indicated above, when teachers assess their own work, their curriculum plan and implementation is an important topic. In this

research project there is focus on the relationship between 1) learning progress related to a curriculum, such as a general teaching-learning plan for one week at a time, and long-term plans for one or several pupils 2) teaching practice assessed with regard to pupils' individual learning processes 3) teaching in the community of the class assessed or with regard to the overall learning process of the class. This threefold relationship constitutes main assessment aspects of educational inclusion. However, not all research teams find that the three aspects of assessment are reported or observed, as mentioned above, and there is reason to believe that some of the aspects are tacitly, rather than explicitly and systematically evaluated.

**What is assessed and how is it applied?** One provisional answer may be that it depends upon how the teacher and special needs educator apply the results of their assessments together. Do they, for example, only look at the grades from class tests? Or do they analyse details of an individual pupil's results in order to find exact indications about their level of mastery, probable next learning steps and mediational needs? Do the seven studies provide answers to these questions? Are all relevant types of assessment used, such as the ones mentioned above? Does the combination of internal and external assessment contribute to increased possibilities for individually adapted support and inclusive practices? In the cases described in this report, this has usually been the case. However, there are examples indicating that the waiting time for appointments for external support has been so long that the school and pupil have managed to meet the special educational need on their own before the external experts arrive on the scene.

**Dilemmas and challenges.** Assessment is possibly the most vulnerable and most criticised aspect of special needs education, as it contains several dilemmas:

- A main challenge for educational inclusion relates to the traditionally close connection between assessment and assigning grades. Does the teacher accept that a certain pupil will receive a poor grade "as usual", or does he or she investigate in detail what the pupil has mastered and what the expected next step in the learning process may be in order to teach in accordance with the pupil's immediate learning opportunities?
- Similarly, special needs education is criticised for paying too much attention to assessment and too little to educational support. It focuses too much on error detection, diagnosing and labelling, and too little on special needs education. The problem of labelling relates to low self-esteem and bullying.

Thus, assessment practices may reveal dilemmas between special needs educational practices, inclusive practices and ordinary teaching practices. Likewise, an assessment of assessment (meta-studies) may reveal dilemmas and barriers within actual assessment practices. Are such dilemmas discovered and discussed in the seven studies of this research project? Several dilemmas are discussed; some of them with reference to findings, others with only wage connections to this research project. The following topics are addressed: a) the dilemma between assessment and danger of negative labelling b) dilemmas related to choice of perspective or direction concerning assessment tools and -cultures c) the problem whether and how organisation of assessments affect teaching and d) dilemmas between local school curricula and national curricula. This last dilemma is addressed in connection with educational intentions.

## Educational intentions

An important part of educators' professional work is to transfer general intentions into concrete and manageable goals through adapting them to pupils' educational needs and capabilities. In order to do so, thorough knowledge about pupils' well-being and learning potential based on formal and informal assessment is crucial. How does school's knowledge about official aims in combination with the class and single pupil's learning potentials contribute to the continuous development of concrete, manageable, individual teaching-learning goals? All research teams state that while the principle of inclusion is affirmed in national policy papers and educational acts in different ways. However, inclusion is one of many and contradictory principles and traditions. The research teams focus on describing and explaining relations and differences between short-term and long-term goals, and even goals in a lifelong perspective. They also point out that contradictions between national and local policies and in particular, individual teaching-learning goals create difficult dilemmas. A general view is that there is a gap between the principle of inclusion stated in educational policies and financial and other opportunities to practice inclusion. The same applies to sign language users (L).

A more concrete dilemma concerns the ability of schools to design educationally appropriate and reachable objectives for individual pupils. The argument is that cooperation with special needs educators and professional upgrading of teachers might solve this problem.

A third dilemma concerns the concrete connection between individual objectives for pupils with special educational needs and joint goals for the community of the class. This dilemma – or challenge – is not easy to solve due to several aspects of traditional ordinary schooling from political and economic to attitudes and traditions in the educational professions, from school administrators to special needs educators and teachers. In this matter, teachers are expected to be the leading profession when it comes to having skills, knowledge and reflections on class management – which in itself may be a serious challenge. What about inviting professional special needs educators to cooperate with teachers?

## Educational content

Educational content is in close connection with educational intentions. When taken together, the two main aspects are expected to answer questions concerning *what* a certain education or teaching-learning process is about. Educational content may be understood as substance and values that are supposed to form the pupil into an educated person (*bildung*); an aspect that has too often been forgotten when pupils with special needs are trained instead of educated. There is therefore reason to recall Vygotsky's (1978) argument that of all pupils, those who have intellectual challenges are in most need of an educator that is able to support the transfer of learning to development.

How do schools select educational content so that all pupils are able to participate in a meaningful teaching-learning process within the community of the class? Each team reports the steps they have taken towards inclusion in view of relevant special educational needs as well as context and possibilities. Thus, the Belgrade team focuses on two measures; a) development and implementation of individualised curriculum in cooperation with school psychologists and special educators from a supporting special school; and b) reduced demands on educational content in certain subjects in accordance with pupils' abilities (B).

Focusing on developing adapted education in ordinary classes for pupils with speech and language impairments, the Sarajevo team of speech therapists provide language- and speech education while the teachers apply additional didactic material and approaches for pupils' acquisition of reading and writing skills (S).

The Tuzla team supports teachers with additional material and approaches based on detailed assessments of levels of mastery for pupils with various types of learning difficulties (T).

In Zagreb the teacher, assistant and consulting special needs educator combine their efforts to strengthen classmates' attitudes to inclusion, respect for diversity, tolerance and acceptance. In order to accomplish this, they apply teaching- and learning content related to communication skills in order to increase mutual respect and positive attitudes between a pupil with psychosocial difficulties and the class (Z). The case pupil of the Skopje team benefits from some individually adapted additional material in his first language and communication approaches due to his hearing impairment. He also gets additional learning material in mathematics, which he masters on an exceptionally high level (MS). Similarly, the Norwegian case class offers additional content in arithmetic combined with the ordinary class content for three of the pupils who show an excellent understanding of and eagerness for the subject. The learning content for pupils with special needs in the class are regulated a) in adapted weekly plans as well as b) extra resources allotted to learning courses for pupils who need additional teaching in order to fully acquire a topic, and c) extra resources allotted to individual teacher support and adaptation of content for one of the pupils in the class on daily basis (O). These are selected examples of individual content adaptation that are mainly applied in ordinary classes.

**What dilemmas are connected to adaptation of content?** Internationally, the most typical dilemma concerns content that is on too high a level of mastery for some (and sometimes the majority) of individual pupils. This may be due to schools' dependence on a strict national curriculum in the form of a pre-determined syllabus – as seems to be the case in some of the participating countries. Another dilemma concerns whether to assign grades or not related to individually adapted content. Is one possible reason for the dilemmas the fact that national curricula for the inclusive school are based on traditions from the ordinary school, while special needs education traditions have not been fully incorporated here?

## Educational methods and organisation

Educational methods and organisation – the educational *how* – are inter-related with intentions and content as well as the other didactic-curricular main aspects. How can educational methods contribute to individually adapted education and inclusion? Methods need to be based on knowledge

and assessment of the pupil's preferred learning strategies. Hence, in order to support inclusion, a variety of methods need to be considered. What kinds of methods are criticised, discussed and practiced in the seven studies of this research project?

**Critique and possibilities in methodological practice:** Teaching too often consists of a single teaching method directed towards the whole class, as if all pupils have the same level of mastery. This is called classroom teaching or catheter teaching, even podium teaching. It is argued that in its strictly limited practice without dialogue with the pupils, it is outdated in the multifaceted classroom. Hence, it is recommended to apply a variation of relevant overlapping teaching methods in order to meet the diverse learning methods of the pupil population. Some methodological main areas of special importance in the inclusive class are mentioned and discussed in detail in the methods chapter above:

- Methods for the plurality of educational needs
- Development and use of additional material for pupils i) that need repetition ii) need alternative material, and iii) need additional challenges due to their high level of mastery
- Development and use of material related to training specific difficulties or overcoming certain challenges
- Step-by-step methodology
- Differentiation of methods and material
- Individual adaptation of methods and material
- Both differentiation and individual adaptation hand in hand

Among the barriers to developing inclusive methodological practices, perhaps the most serious challenge is the lack of knowledge and skills regarding the diversity of methods and their relation to different educational needs. Close cooperation between class teachers, subject teachers and special needs educators is expected to develop and continuously extend a joint arsenal of methods and materials, due to educators' different knowledge and skills along with professional experience from the teacher-pupil relationship with which every school is enriched. Extensive sharing of methods and materials between special needs educators and teachers as well as between teacher colleagues is reported from the studies.

**Organisation** and methods are means through which learning is intended to take place; they are mediating tools. The continuous interrelationship between

educational considerations regarding the whole class and the plurality of pupils with different educational needs demands multiple organisation as described by Alexander (2000), and which is found through observations and interviews in the seven studies. There are several aspects and levels of multiple organisation or organisation for inclusion, whereof findings from the following are reported and/or discussed:

- Organising in different time perspectives: Long-term organisation – school year and semester organisation – organising the school week – organising the school day and the lesson
- Multiple group sizes: Organising into large classes (two or more classes together) – into groups – individual teaching
- Different educational scenes or places: auditorium or large spaces – classrooms – group rooms – rooms for dyadic teaching – out of school building teaching – in “the heart of the school” (such as an extended library permanently staffed with library-teacher/s, regular teacher/s and special needs educators)
- Use of educational resources: one class one teacher – collaborative teaching, where more than one educator work in the classroom with the pupils – flexible use of educational staff in large classes, combination of class, group and individual teaching, teacher and special needs educator, teacher and assistant – educational resources in individual teaching – educational resources outside the classroom and school

The most typical areas confronted with dilemmas and challenges are:

- 1) Organising teaching staff, where a main challenge is the typical one-teacher-in-the-class organisation, and where the expectations are that one professional handles teaching all pupils with their different educational needs.
- 2) Organisation in one or multiple teaching-learning arena: A main dilemma is whether pupils with special educational needs should be part of the classroom for all or placed in separate rooms for special teaching, and if so, for how long part of the school day. Segregation of groups and individuals is an obvious barrier to inclusion that are actively dealt with in the “pre-post” and “action research” studies.

These possibilities for organising are not exhaustive. Schooling is a complex activity requiring organisation in accordance with varying aspects and different levels of learning, all of which may promote or inhibit inclusion.

## Communication

Communication between teacher and special needs educator and – first and foremost – between school and pupil in cooperation with parents is a key prerequisite for inclusion. Therefore, communication is introduced in this curricular relation approach as an important main aspect that must be planned, practiced and continually revised in a similar manner to other curricular main aspects. In this research cooperation attention to pupil's individual problem-solving is subordinated or understood within a cultural-historical context or as an integrated process of teaching, learning and development. Communication constitutes the bridge between a) the cultural-historical context at any time and in any culture, b) educators and c) pupil. Thus, the Zagreb team points out that "... communication is very important for sharing information and knowledge, and it can be a motivation for good teacher-pupil collaboration" (Z). Communication and mediation approaches are appropriate for guiding individual- and class curriculum activities. They are therefore of great importance when we are preparing concrete educational intentions, content, methods and organisation based on assessment of individual learning possibilities and need for support (Johnsen, 2014c). Communication is a multi-faceted phenomenon. It may be divided into communication technological and human relational aspects, even though there is a large grey zone, or overlap, between the two. The following questions deal with **communication technological aspects**:

- Do we hear and see each other (levels of light and noise in the classroom, etc.)?
- Does anyone need visual or hearing aids?
- Do we need special communication media such as sign language, signed speech, icons, digital communication programmes or other augmentative devices?
- Do we need systematic step-by- step support in learning to understand and apply a language?

Combining different languages and modes of communication, as those mentioned above, are examples of communication technological matters. In this study, several good examples of facilitating are described, whereas the lack of communication and support is also discussed (L, SM). Several supplementary measures are reported, use of flashcards, posters and other illustrations, securing good lighting in the classroom and securing an open but acceptable level of "working noise" in order to facilitate communication and cooperation among pupils. In addition, the use of computer programmes and the internet has increased during the project period (O, S, SM). Communication technological

matters relate to questions about whether or not we can properly see, hear or understand each other.

**Relational communication** or human relation aspects of communication focus on human attention or the ability to be aware of every single pupil and base subsequent communication on the pupil's level of mastery and capabilities. Thus, relational communication focuses on pupils being seen, listened to and taken seriously (Johnsen, 2014b). How does relational communication appear in the seven studies? The following examples represent reported characteristics of relational communication and dialogue: Showing acceptance and appreciation of every individual pupil and the whole class – giving ample time to converse with the pupil – waiting for the pupil's reaction – appreciating feedback – trying to resolve misunderstandings – using verbal and nonverbal communication in general and facial expressions in particular – striving for insight – recognising and accepting the pupil's feelings, needs and individual communication and learning strategies – repeating and clarifying instruction in accordance with individual needs – giving positive feedback and praise in oral and written form – mediating the dialogue in the class in order to support the understanding of pupils with hearing-, speech and other difficulties (B, L, O S, SM, T, Z).

There are, however, also several challenges concerning communication in the classroom. Thus, communication barriers or negative communication, reported by the research teams are so-called “less helpful teaching traditions” that may be divided into the following three categories; a) monologue teaching, b) error-focused communication, and c) communication and collaboration difficulties – between teacher and single pupils or the class, among educational staff members and between school and parents.

## Care

Care is a relational phenomenon; while it clearly connects with relational communication, it contains more than communication, namely an explicit and generally positive human mentality permeating professional perspectives and practices in all educational reflections and actions – including the eight didactic-curricular main aspects. Thus, there is a grey zone, or a common zone, between care and other main aspects of the curricular relation approach. Care is also related to philosophical-ethical reflections, as found in Kristeva's recogni-

tion of our joint human vulnerability (Johnsen, 2014c; Kristeva, 2010) and other didactic stands such as Danish scholar Susan Tetler's (2000) "didactics of generosity". Why situate care as a main aspect in the curricular relation approach? Through history, undoubtedly a large number of teachers and special needs educators have cared deeply for their pupils. It is, however, important to raise the human-professional awareness of why and how care is a fundamental part of the development of inclusion. The caring approach represents a special needs education extension of traditional discipline- or knowledge- and skills focused classroom education; an extended approach benefitting all pupils in the class. Care is essential, since positive learning depends on satisfying basic human needs, including a sense of belongingness and acceptance, recognition and dignity (Befring, 2014; Johnsen, 2014b; 2019a; Rye, 2005). Accordingly, it is crucial to be aware of – not only the learner – but the whole child and young person within her or his social and cultural context with his or her personal history (Johnsen, 2014b; Noddings, 1992; 2002; 2003). Consciousness about the joint cultural heritage and conditions shared by school and pupils is important with its potential joys as well as barriers and possible traumatic conditions<sup>50</sup>. Sensitivity towards personal conditions and the whole range of developmental potential and needs is an important and often difficult challenge for teachers and special needs educators. Pupils need to perceive care, which reveals itself in attitudes, in small informal talks, in eye contact or a light touch on the shoulder, in some nice words about what was good in the homework as well as in concern. Care and sensitivity manifest themselves in human-professional planning, practice and evaluation of all aspects of the wellbeing and education of each single pupil and the whole class (Johnsen, 2019a).

**How is care described and discussed in the seven studies?** The findings indicate that care is expressed in a variety of ways and connected to different conditions and situations. The following categories are examples of the many aspects of care that are presented and discussed:

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50 Currently, consciousness about how to welcome and create an accepting and resource-based companionship between pupils with different and often new cultural backgrounds compared to a former more or less homogeneous school has become one of the main topics of concern for developing inclusion. This is a joint challenge for all participating schools, even though there may be differences in appearances. These kinds of challenges have not been a focus of this research cooperation. However, the development of inclusion between members of different cultures is gaining an increasing amount of attention in social and educational research. Research in which "the population of diversities" is analysed in relation to the development of social and educational inclusion is very important.

- a) care and the educational professions
- b) characteristics of caring relations: focus on the whole child and youth – belongingness – recognition – supporting pupils’ experience of mastery – supporting expressions of feelings – sharing personal experiences – encouraging peer collaboration and care – awareness of pupil inside and outside the classroom – supporting coping strategies
- c) caring relations with individual pupils
- d) “classroom care”

The role of care as inclusive practice plays a prominent role in the chapter on care. For a more detailed conceptual discussion of care and the closely related term sensitivity, it is referred to the chapter *Care and sensitivity in upbringing and education – An introduction to related core concepts in selected resource-based interaction traditions* (Johnsen, 2020a) in this anthology.

Are there any dilemmas connected to care in the classroom? As one teacher points out:

“It is not for nothing that teaching is called a caring profession, but care and neutrality do not go comfortably together. Professionalism lies in striving to care even-handedly” (O).

There may be a fine line between care and exhaustion and burnout symptoms, and there is certainly a connection between care and concerns or worries about pupils and their conditions inside or outside school. There are several challenges for pupils with special needs when starting ordinary school. Are they welcomed in the class? Or are they rejected – by pupils, by some parents, and even by some teachers? Rejection is the opposite of care. Negative attitudes towards people with disabilities may be found among teachers, parents and the local community. It is a challenge to pupil’s well-being and the development of inclusion – and consequently, to teachers’ striving towards inclusion. These dilemmas and challenges are discussed in the studies.

## Context

Contextual aspects embrace the inner activity of schooling, connecting it to a larger cultural-historical perspective. A series of frame factors serve to situate findings from the educational micro level within the cultural-historical contexts of the participating communities. In this way the contextual focus takes this research project beyond former traditional inclusion studies where

the focus has tended to be either on politics and societal factors or isolated classroom studies, as briefly discussed in the joint research plan and other texts (Johnsen, 2013a; 2015). During the post-World War II period, Europe, including Yugoslavia and Norway, participated in the growing welfare state development, each in its own way. However, since the 1980ies history has been significantly different. While Norway and the Nordic countries has experienced a peak of prosperity, the other participating countries have lived through dissolution and wars with accompanying serious setbacks in their economies and capacity to provide citizens with welfare services. However, the division and new state building also leads to building of new national institutions. Expansion and development of higher education institutions is relevant to this cooperation, especially when it comes to higher education of teachers and special needs educators.

In what way do contextual aspects function as a bridge between the schools' inner activity and surrounding conditions? Frame factors are described and discussed in the seven studies. They tend to explain the state of affairs, or as arguments for challenges to the development of special needs education and inclusion. Several contextual aspects are highlighted in the joint research report that give indications of similarities and differences between the participating countries. Among common international frame factors are the ratifications of international conventions that all participating countries have signed, even though the countries with a history as parts of Yugoslavia, for obvious reasons, only recently ratified former UN conventions such as *Convention for the Protection of Human Rights and Fundamental Freedoms* (1950). When it comes to physical frame factors such as classrooms, school buildings, schoolyards and local environments, the buildings are rather similar and not quite new. Some have been renovated after war; the Norwegian case school was the oldest until it was replaced with a new building fulfilling the criteria of universal design. However, the studies in all participating schools, including the old Norwegian school, show how educators manage to adapt physical environments to the needs of all pupils despite limitations of universal solutions. All countries have incorporated special needs education and inclusion in their ordinary school policies. When it comes to financial capacity, Norway is amongst the most privileged countries in Europe, spending a considerable amount of resources on special needs education measures. The other participating countries' gross domestic products (GDP) are average or below this on the European scale. The research teams express serious concern about the gap between the agreed upon principles and

lack of resources for special education and inclusive measures. There is a whole range of social and cultural frame factors influencing the inner activity at school. When it comes to attitudes and mentalities it is, however, difficult to estimate differences since the research is not based on thorough anthropological studies. Teachers, special needs educators and school administration, parents and pupils, politicians, officials and media – in short; everyone – mirror explicitly or indirectly attitudes towards social and educational inclusion. The mentality may vary from ignorance or denial and insecurity to positivity and hope. As an example of a reluctant attitude, a reason for withdrawing from participating in a study of inclusion may be lack of knowledge about a country's policy or insecurity about how to implement the principle. This is understandable in Bosnia and Herzegovina, Croatia, Macedonia, Slovenia and Serbia, where the legislation is rather new. Similar reluctance may be difficult to accept in Norway, where the turn towards a school for all and inclusion took place around fifty years ago. However, all research teams have engaged schools willing to take part in the study and established close and positive relations in their search for good examples as well as dilemmas and challenges in the development towards educational inclusion.

## 11 Further reflections

Following presentations and discussions of empirical findings within the eight didactic-curricular main arenas, relevant joint findings are selected and discussed in light of the following perspectives:

- What are inclusive practices?
- Similarities and differences of findings from the seven studies
- Dilemmas, barriers and challenges in the schools' development of inclusive practices

### What are inclusive practices?

There are many descriptions and “definitions” of the principle of inclusion. This international comparative research cooperation is based on the following description, which was applied to the joint research plan (Johnsen, 2013a: 228) and is also on the first page of this report:

Inclusion is the global policy prescribing development towards a local regular school that welcomes all children with their unique individual characteristics, interests, abilities and learning needs; all children with and without special needs and disabilities; a school combating discriminatory attitudes, and offering meaningful and individually adapted education to every pupil within the community of the class (Frederickson & Cline, 2002; Johnsen, 1998/2000; UNESCO, 1994).

One of the recurring challenges pointed to in the previous chapters is the gap between principles and practice. The underlying intention of this research is to search for inclusive practices through exploring the inner activities at school, as the title signifies: *International Comparative Classroom Studies of Inclusive Practices*. The starting point in the construction of the research project is the main issue:

How does the school teach in accordance with the pupils' different levels of mastery and needs for support in the learning process (resources, barriers and dilemmas)?

It concerns how to construct a bridge between the principle of inclusion and practices related to individual pupils as partners in the joint class or group. The question challenges practitioners as well as researchers to consider a) what "professional tools" are available in order to plan, practice, assess and revise a teaching process based on the diversity of pupils' levels of mastery and capabilities and, consequently, are meaningful in their learning process; and furthermore b) how to embed the teaching-learning process within the community of the class. To the extent schools aim towards these expectations, they are arenas in the development of inclusive practices, as argued in Johnsen (2014b). A joint set of didactic-curricular categories represent main aspects of the teaching-learning situation and process. Each main category contains in principle an infinite number of subcategories. They are interrelated as well as related with the intended users of the tools, in other words the practitioners who work in schools and researchers who explore schools' practices. These didactic-curricular main aspects, or categories, are theoretically reflected and developed in advance of the empirical studies, as discussed in the introduction chapter. They are thus essential in the construction of the research project and applied as main categories of findings, as shown in the eight previous chapters.

Politicians, professionals and researchers have written about inclusive practices. However, descriptions of the phenomenon are usually limited to general phrases, such as: "Inclusive practice is an approach to teaching that recognises the diversity of students, enabling all students to access course content, fully participate in learning activities and demonstrate their knowledge and strengths

at assessment” (*Equality and diversity for academics*, 2013). The seven cooperating studies in this research move one step further from general formulations as quoted above, to exploring concrete empirical examples of inclusive practices found within one or more of the seven main aspects in accordance with the didactic-curricular relation approach. It is important to keep in mind that the seven didactic-curricular aspects represent the inner activity of schooling – the teaching practice – or internal micro dimension, as Alexander (2000) calls it. The question is whether categorising a teaching phenomenon within one of the seven main aspects is sufficient for being described as an inclusive practice (as has been done in the categorising chapters). Or, are relations to all of the seven main aspects necessary to cover a complete and comprehensive set of inter-related actions? These two alternatives seem to be extremes on a continuum.

The position in this work is that a teaching practice or activity classified within one or more of the main categories interacting with a pupil’s level of mastery, proximal zone of development and need for mediational support in the community of the class, meets the criterion as an inclusive practice.

As repeatedly pointed out, many of the reported practices may be placed within two or more of the categories, or to the so-called “grey zone” between two or more categories. This research project delimits the analysis to the categorisation of inclusive teaching phenomena within the seven main aspects representing the inner activity of schooling. However, the findings may be viewed as inclusive details or components that have potential for further analysis as elements in holistic composite inclusive practices.

## **Similarities and differences of the findings from the seven studies**

The compilation of results from all the research teams provides an interesting insight into how many similar findings are reported. One reason for this may be that there is joint attention paid to the seven didactic-curricular areas of the inner activities at school. However, as pointed out, there are an “infinite” number of topics that may be mentioned within each of the main categories. Furthermore, the variations in research designs and focus as well as different contexts of the seven studies also give reason to expect differences. What are the main similarities in the answers to the research question of how schools teach in accordance with the pupils’ different levels of mastery and needs for

support in the learning process in the community of the class? What inclusive practices may be characterised as similar? In the following, findings that may be characterised as similar are presented from the different didactic-curricular areas. However, there are also a number of findings representing one or a few of the seven studies; some of these are rare and unique, or different and surprising. Some may contribute to shedding new light on the phenomenon of inclusion. Thus, after the similar findings, single and rare findings of inclusive practices are presented.

## Similarities

The overall findings show that class teachers are in focus in all seven studies. They are described as main actors concerning knowledge about individual pupils in the majority of the studies. All research teams explicitly or implicitly point to **the importance of being aware of pupils' wellbeing** – more specifically, pupils with special educational needs. Thus, pupils' psychosocial functioning and relationships in the class combined with academic performance are the two prioritised aspects, even though specific focuses vary.

**Thorough knowledge and assessment of pupils' level of mastery and mediational needs is a prerequisite for individually adapted education.** The professional knowledge bank from ordinary and special needs education stores a multitude of assessment approaches and tools; these are both formal and informal. Accordingly, the point of this international comparative research project is to describe assessment practices and their relation to the policy of inclusion. The following questions frame the descriptions: a) Who and what are assessed b) who assesses c) what kinds of assessment approaches and tools are used d) how are they used, and why? The findings indicate several similarities in the seven studies' assessment practices. Most class and individual assessments are informal. Thus, more or less "homemade" tests are typical class assessment tools in all school subjects. In some subjects, tests are frequently repeated, such as weekly English glossary tests. In some cases school starting tests are used in order to screen pupils' level of mastery in certain subjects at the beginning of autumn semester, for example in arithmetic. In addition to tests, checklists, observations, pupils' work and logbooks or diaries are also used. Class assessments are likewise central to information gathering related to individual pupils. In addition, talks with individual pupils, from everyday conversations to systematic dialogues and interviews, are reported to give important information.

Some research teams report that the school arranges self-evaluation for the pupils as part of the overall assessment. There is, however, a question how thoroughly the informal assessments are used to analyse the concrete level of mastery and need to support of the individual pupil. Pupils with some kind of special need are usually assessed systematically by class or subject teacher. In all studies, there is access to special needs educators or other specialists. In four of the studies, systematic and repeated special needs educational assessment is part of the research project as elements in action research studies or other research designs.

**Educational intentions.** All the research teams state that while the principle of educational inclusion is affirmed in national policy papers and educational acts in different ways and levels of completion. However, they also point to a gap between the official acceptance of the principle of educational inclusion and facilitation of human and other resources in order to realise the principle. What kinds of goals are reported? Almost everyone's intention is to develop and support pupils' psychosocial and academic participation in the classroom. The exception is the critical studies of communication between hearing and hearing impaired pupils in mixed classes, where the intentions are, rightly so, to encourage inclusion of the two groups, but the perceived results are class communication on the premises of the hearing pupils (L). Several of the studies focus on educational intentions supporting pupils with specific disabilities or difficulties, such as speech intelligibility and different kinds of alternative communication. Most teams describe goals related to psychosocial well-being, communication, knowledge, skills and awareness raising of attitudes. They also describe and explain goal setting in relation to different time perspectives of individual curriculum making from short-term and long-term goals to goals in a lifelong perspective.

Describing and discussing **educational content** may be divided between a) content differentiation for pupils with minor specific needs that are planned and implemented by teachers and b) developing individually adapted content for pupils with major special education needs. Even though some of these pupils are partly educated or trained either individually or in small groups, the goals are to prepare them for activities in their ordinary classroom. An extensive use of specifically made and adapted communication and learning material is reported; much of which has been created by teachers and special needs educators. Most research teams find traditional class teaching or lecturing to be a **main teaching method**; however, this is used together with a number of additional methods.

Thus, in several cases traditional lecturing is observed used together with disability specific approaches, such as sign and speech and oral lecturing in combination with blackboard teaching. Combined methods are usually attached to flexible use of materials, as mentioned above, and approaches adapted to specific needs for single pupils in ordinary classes. Step-by-step methodology is observed being used in dyads and ordinary classrooms. Most teams report an active use of dialogue in different variations. Some research teams apply the concept scaffolding in order to explain teaching-learning interactions. Another commonly reported finding concerns so-called appraising teaching or diagnostic teaching in the class, in groups and in dyadic teaching. When it comes to **organisation of the teaching-learning process**, most research teams, five out of seven, have made agreements with their participating school or schools regarding multiple organisational frames, contributing to developing and trying out inclusive practices. As indicated above, all participating schools are reported to have out-of-class teaching in groups or individually in addition to the main organisation in a whole-class structure. Some of the schools organise the pupils in collaborating groups across levels of mastery. Several of the research teams work with individual pupils, specifically those who have special educational needs. All participating project schools have found rooms to work with individual pupils, and several schools are reported to have rooms for group work as well as dyadic teaching. Most of the participating schools have had access to special needs educators during the project period, all of whom provide special needs assessment and education in dyads and small groups. The most common special needs education support is provided as guidance to teachers and assistants as well as parents.

As discussed above, **communication** has two main aspects, namely a technological side and a human relational side. All research teams consider communication technological aspects to be important for educational inclusion; indeed, two of the teams focus mainly on communication. The use of sign language, sign to speech and stuttering therapy are amongst the communication technological aspects in focus. These require supervision and collaboration between special needs educators and ordinary teachers. All research teams point to the importance of positive relational communication with all pupils and the whole class, and specifically with individual pupils with special educational needs. Communication is also emphasised in the collaboration between researchers and case schools, which is characterised as close and positive. This may be seen in light of the complicated process of finding research schools where some of the teams

tried repeatedly before succeeding to find a partner school. Consequently, it is fair to characterise the participating schools as “more than average” interested in developing educational inclusion.

When it comes to **care**, there are several similar findings between the different studies. An overarching characteristic of the care that teachers and special educators show indicates a holistic attention to the pupil as an individual human being and member of the class. All research teams point to the importance of creating an atmosphere of recognition and contribute a variety of examples showing how to secure pupils’ perception of being seen, heard, respected and trusted. Many different examples are reported about teachers and special needs educators who encourage pupils to talk about their feelings, share personal experiences with the class, encourage and facilitate peer collaboration in diverse pupil groups, and who discover and support children who may be experiencing difficulties and traumas. However, care also tends to be accompanied by concerns and worries. Teachers’ and special educators’ worries concerning different kinds and severity of problematic conditions – inside and outside school – are visible in the studies, as indicated in the reported examples. Findings from most research teams indicate that teachers and special needs educators are among the caring professions.

From the point of view of didactic-curricular relation approach, it is particularly noticed that **all participating teams have given considerable attention to two main aspects, namely communication and care**. As described, the two aspects represent extensions of former, more classical “academic” didactic-curricular aspects. In addition to focusing on the didactic-curricular aspects in the teaching-learning processes, **several findings focus on the mediating actors – from teachers and special needs educators to principals** and external partners – their activities and cooperation. In all case schools, headmasters have a central role. It is argued that they have important roles in developing tolerance and care for pupils with special educational needs. Collaboration between different partners is pointed out, such as between teachers and internal or external special needs educators, in the development of individually adapted content. Contact between school and parents is highlighted in all cases.

Robin Alexander states in his cross-continental comparative study *Culture and Pedagogy* (2000), that everyday schooling in the five different countries and cultures he and his team studied are seemingly similar in many ways. He wonders whether several structures and even practices are generally accepted as prototypes of schooling. Similar indications may apply to this study as well, even though this research cooperation focuses in more detail

on the two specific didactic activities; a) practicing special needs education knowledge and skills within the ordinary school; and b) aiming towards educational inclusion. However, the findings in this research project raise the question of whether it is timely to change the traditional structure of mainstream schooling.

## Differences

Turning the attention to differences, the question is reformulated as follows: What are the main differences in the answers to the research question of how schools teach in accordance with pupils' different levels of mastery and needs for support of the learning process in the community of the class? What inclusive practices may be characterised as rare, unique, or different from the majority of findings – or even surprising? Rare and unique practices are found in each of the seven didactic areas of schools' inner activity. Some of these are highlighted in the following.

Special needs educators may be in a good position to acquire thorough knowledge of single pupils, since they often teach in small groups or in dyads. When it comes to regular class teachers, there is, however, an outstanding example of a teacher where long-term observations and interviews reveal that she has thorough empathetic and holistic knowledge of every single pupil in the class, including the pupils' context and conditions. This knowledge is reflected in the teacher's communication with each pupil and knowledge about the pupil's level of mastery, interests, relationship with peers and persons inside and outside of school as well as their educational needs, as observed in her teacher-pupil interaction and confirmed in interviews. Thus, even though most pupils work in accordance with the same academic weekly plan, some pupils have less, different or more challenging tasks. It is in this way that the circle of interrelated didactical details results in individually adapted education. How does she manage what may be characterised as the craft and art of inclusion? Of the many factors observed, three are mentioned specifically here: 1) her many years of teaching experience; 2) her steady professional skills training through having taken a number of higher education courses in related educational fields, whereof two relate to special education needs; 3) her open professional relationship with headmaster and colleagues. It needs to be pointed out that this teacher was recommended as a participant in this study when the researcher requested "a good example" due to

her renowned practice. However, this leads to the question of what hinders otherwise good teachers from doing the same? The reasons may be many. One reason may, however, be a contributing factor: This school is located in a town having around 10 similar schools; in other words, not a very large community. In big cities, large distances between where teachers live and their school may challenge their insight and understanding of the pupils' and class' local context, thus complicating their opportunity to get to know pupils' conditions. This is a barrier.

As mentioned, special needs educators participate in all the seven studies; in some of them providing **assessment** and advice to teachers, parents and pupils, in other cases working with assessment, special needs education and research. The Tuzla team applies a thorough assessment procedure that may be interesting. They describe their use of three international scales for assessment of the teaching-learning process in their action research study, and how the scales support their goal setting in the following way:

The investigation of the six case studies has a short-term goal of focusing on the increasing levels of the children's functional status and annual goal of achieving good results in comprehending the teaching curriculum and teaching social communication in the teachers' collective, the family, and in the immediate and extended community (Salihović & Dizdarević, 2014: 310).

The Tuzla quotation above illustrates the connection between assessment and **development of educational intentions or goals**. The impression from the seven studies is that practices of developing and revising educational intentions are rather similar when it comes to a) facilitating goals based on formative assessments for pupils with different special educational needs b) applying long-term, short-term and step-by-step goals, and b) directing goals on learning arenas focusing on knowledge, skills and attitudes. However, little if any attention is paid to setting goals concerning creating access to experiences, which is of specific importance for several disability groups. Another focus area has emerged and is reported by almost all participating research teams, namely formulating **educational intentions for psychosocial wellbeing and development**. **Educational content** differs between countries, as expected, but the principles used to provide for the diversity of the different pupils' educational needs are similar. However, facilitating learning content is not only about pupils who experience difficulties. In two of the studies, teachers are reported to offer additional high-level learning tasks in order to meaningfully challenge pupils with exceptionally high performance levels. **Educational methods and**

**organisation** may, similar to educational content, be characterised as consisting of a diversity of different measures. Summed up, they may be based on common main aspects such as diversity of methods, focus on pupils who need more or different educational support and diversity when it comes to full-class, small-group or dyadic teaching-learning organisation. Three different reported findings that may contribute to a broader repertoire of inclusive practices are mentioned in the following:

1. Most schools inform parents and other co-workers about their programmes every school year and welcome them to meetings, information exchange and collaboration. The collaboration between schools and parents is usually greater when a pupil has a disease or a disability. Being aware of the importance of information between families and school, one of the case schools distributes their annual school curriculum to every family. It consists of an overall joint plan for the whole school with a specific theme that will be in focus the coming year, of organisation of teaching in each school subject on each grade level as well as contact information to school leadership and class teachers (O)
2. Systematic collaboration between consulting special needs educator, class teacher and assistance in the classroom is practiced in the Croatian case school (Z). This is similar to the direct cooperation with teachers in Tuzla, Sarajevo and Macedonia (MS, S, T).
3. Out-of-school teaching is gaining increasing importance in Norwegian schools and is also practiced in the Norwegian case school, merging several school subjects in project work “teaching in the forest” (O).

**Communication** is the main area in the Ljubljana study because it specifically focuses on the Slovenian population of pupils with deafness or hard of hearing (L). They report from an outstanding study that differs from other studies in its focus on communication, psycho-social wellbeing and inclusion of this group of pupils. The study is a combination of classroom observations and interviews with pupils and teachers, keeping the pupils’ voice at the centre of the study. What do these pupils tell us? The research questions concern if and how the academic and relational communication between pupils, their peers and teachers is mutual. Or is it one-sided, favouring the hearing people at school? How are these pupils welcomed in the regular school? A main conclusion in this triangular study is that: a) some schools are ready to accept deaf and hard of hearing pupils and others not b) teachers

in mainstream schools are well educated for mainstream curricula, but less competent in the field of deafness and related communication strategies, and c) sometimes schools are not able to recognise and provide sufficient communicational means for deaf and hard of hearing pupils (Kogovšek, Ozbič & Košir, 2014; 2018). This study “listens” to schools in many countries pointing the finger at several special needs education challenges and, at the same time, indicating a number of innovative tasks that need to be dealt with. Care and socio-emotional wellbeing are amongst the curricular relation aspects in focus of the Ljubljana team, who discuss risk factors related to the well-being of pupils who are deaf or hard of hearing (L). Similar to communication, **care** has a prominent place in all the seven studies, and different dimensions of care are found in every study.

- Thus, the Zagreb team points out that care means child-centred education (Z)
- The Belgrade team highlights that seeking collaboration by more experienced schools and special needs educators’ shows care for the pupils with special educational needs as newcomers in the regular school (B)
- Arranging and following up peer cooperation groups across levels of mastery helps create caring relationships among pupils (S)
- The classmates search for “the best qualities” of every fellow pupil in accordance with Gardner (1993) and Armstrong’s (2003) multiple intelligences has proven to contribute to their caring and accepting one another since they started in first grade on (O)
- The close follow-up in cooperation between special needs educators, teachers and parents to facilitate the learning process for pupils with special educational needs in regular schools show joint care (SM, S,T)

A number of examples of inclusive practices are reported in each of the seven studies. They indicate being based on joint ideas about educational inclusion shared by the participating schools and research teams. The examples mentioned above are perceived as outstanding in ways that either indicate relations to different educational traditions and contextual conditions, or they are examples that are expected to awaken professional curiosity.

**Dilemmas, barriers and challenges in schools’ development of inclusive practices:**

Are they generally recognisable, or do they seem to depend on specific circumstances? Exploring, describing and discussing good examples of inclusive practices are in the foreground of this research project. However, there is ample

reason to critically explore and analyse dilemmas, challenges and barriers, as documented in Bagga-Gupta's (2017) introduction to the anthology *Margin-alization Processes across Different Settings: Going beyond the Mainstream*. The turn towards the inclusive school is evidently a turning away from traditional mentalities, principles, attitudes and practices; it is actually a major innovation project. Changing practices often leads to resistance, as pointed out in innovation literature (Skogen, 2001; 2019). Challenges must therefore be expected for these reasons as well as due to ongoing pitfalls, dilemmas and contextual conditions, as accounted for in each didactic-curricular area. In this research project, several issues concerning challenges and barriers to inclusion are found and discussed, even though they remain further in the background than inclusive practices. Thus, dilemmas and barriers are not only discussed in the chapter on context, but they also occur in chapters related to the inner activity of schooling. In the following, a summary of dilemmas and challenges is presented and discussed within each of the didactic-curricular areas, focusing on the questions:

- Do the findings indicate similar dilemmas and challenges in the seven studies, or are they more location specific?
- Are there connections between the challenges found within each of the seven aspects?

In-depth knowledge about the pupil and the whole child is important in the seven studies. However, sorting out what information is relevant and what is not may be a dilemma – and sometimes a challenge – as the following examples illustrate: a) A “cry for help” may be hidden in a pupil's small talk. b) Information may be too intimate and interfere with the pupil and family's privacy without being relevant for the well-being and learning. c) It is a serious challenge that some so-called information about pupil and family relations may be directly incorrect. d) Some information is “need to know” for those who have responsibility for the pupil during the day, such as if the pupil tends to get epileptic seizures, about which all caregivers – at home and in school – need to be informed about and trained to react correctly. However, e) some information should only be shared when necessary. All research teams have accounted for the importance of sensitivity regarding information seeking and sharing in view of privacy principles as part of research ethics. One of the case schools provides detailed information about how the school carries out the responsibility of being their pupils' advocate in case of concerns:

- If it is assumed that a pupil might need additional support and help due to academic, psychosocial or other factors, the class teacher contacts the headmaster and gives a detailed account for the cause of concern. Thus, the headmaster and class teacher assume joint responsibility for acting in accordance with the concerns.
- A next step would be to contact the parents or legal guardians for a meeting. If caregivers share the concerns, the school might help them to contact external agencies, such as educational-psychological service, social service, child and adolescent psychiatry service or child welfare service. The school's contact with external services can only happen with the caregivers' written consent.
- In case there is a suspicion of neglect or abuse, the class teacher and headmaster follow the same procedure, thoroughly discussing their suspicions until they reach a conclusion concerning further steps
- If necessary, the headmaster and class teacher report their concerns to the local municipality's child welfare service.

When interviewed, headmaster states that cases of serious concerns due to different factors are as a rule sensitive, complex and difficult to handle. Many dilemmas and challenges need discussion. Consequently, a single teacher should never handle such matters alone; on the contrary, it is the school's joint responsibility. The headmaster points out that parents usually initiate meetings with the school because their child either has an illness or a visible or hidden disability or other problems, and the first meetings are usually a starting point for close cooperation. She also points out that the number of matters of concern has increased rapidly over the past few years. Accordingly, the contact between school and other services has increased from a few scattered cases until the current situation where different services have started to meet regularly for coordination and cooperation.

**Assessment** and evaluation may reveal dilemmas between special needs education practices, inclusive practices and traditionally applied practices. Likewise, assessment of assessment (meta-studies) may reveal dilemmas and barriers within actual assessment practices. Are such dilemmas discovered and discussed in the seven studies?

- a) The classical dilemma between assessment and the danger of negative labelling is discussed. Being labelled and categorised into a disability group may have negative effects on pupils' self-concept and other pupils' attitudes. All research teams are aware of this dilemma.

- b) Dilemmas may be related to the choice of perspective or direction when it comes to selecting and interpreting assessment tools. For example, the intention behind assessment may be to place pupils in specific groups or classes, or it may be to monitor their learning progress within the regular school and class, as in the action research studies. Assessment for placement of pupils in special units does not occur in these studies.
- c) One kind of dilemma, or problem, is related to whether and how selection, organisation and interpretation of assessment affect the way schools teach. Are schools sensitive to this? The principle of inclusion has guided the organisation of assessment in the research project, especially in the action research studies, whereas it has guided critical explorations in the remaining studies. All in all, it seems that the assessment procedures explored and implemented in the seven studies, even though different, aim at increasing inclusive practices in accordance with the joint research issue. However, in the Norwegian context there is an awareness that international tests such as the PISA test have serious effect on teaching activities in some schools – an effect that may seem to compete with the national curriculum, where inclusion is a principle (O)

**Educational intentions:** There may be possible contradictions between national and local policies and between general teaching-learning goals and goals for individual pupils; whether this is due to performance far above or below or alongside the academic requirements of school subjects. This is a challenge. How do the participating schools' knowledge about official aims and the single pupil's learning potential contribute to a continuous development of concrete, manageable, individual teaching-learning goals in the community of the class? This is a significant question at the centre of inclusive educational intentions. The findings indicate that the special educational needs of pupils participating in the case schools are found via detailed assessments and followed up by relevant educational objectives. Still, the relationship between aims and goals in official curricula and concrete step-by-step objectives in educational practice is not clear in all cases, and are perceived as a dilemma, as pointed out by several participants. A common way to solve this dilemma is by making exceptions to ordinary learning requirements (O). A common mistake is to formulate too general goals without breaking them down in a step-by-step development of actual realistic topics and tasks. As a rule, this proves to be a barrier instead of an educational tool. It may also be an attempt to avoid certain educational requirements. These problems are especially common for pupils with special educational needs.

The most typical dilemma pointed out when it comes to **adapting educational content, methods and organisation to the level of mastery** of individual pupils is – again – the dependence on national policies and curricula, which differ somewhat between countries. That is, even though exceptions are allowed in some countries, what is expected to be “within the normal range of the age level” divides the class into a large number of pupils in and a small number outside nationally expected learning content. Referring to the video *One Society for All* (Bolsø, 1989) and the article *From the Exceptional to the Universal* (Gardou, 2014), this curricular dilemma is challenged by examples of the daily lives of profoundly impaired pupils at school and home. Limited knowledge about special needs education methods amongst ordinary teachers is most frequently mentioned as a serious challenge to the development of inclusive practices. Methodological considerations strongly affect choice of content such as materials and equipment, literature, paper and pencils, computers and software programmes, videos etc. Having a special educational need as a rule means that content, methods and teaching organisation need special adaptation on behalf of the school in order to meet the pupil’s individual learning strategies. Challenges have also been reported concerning different organisational measures. Findings in the Ljubljana study document that in mixed classes with hearing and hard of hearing pupils, communication seems to be based mostly on the premises of hearing pupils (L). Thus, the study sheds light on a widespread problem for both pupils with hearing impairments and pupils who need other alternative communication and educational means. Organising small groups and teaching on an individual basis also have pitfalls. Extended use of teacher-pupil dyads as well as small group teaching might be a way to avoid making radical changes in the traditional classroom. The kind of organisation inside or outside the classroom contributes positively or negatively to inclusion for the class and the single pupil. This is a dilemma that needs to be treated seriously. The individual teacher in the classroom is perceived as having the classic role of the regular teacher. This organisational model does not require additional economic resources even though diversity has increased in “the school for all”. The focus on the class teacher bearing the sole responsibility for creating an inclusive class is described as a serious challenge in a recent Swedish PhD dissertation (Kotte, 2017). This is the most typical organisation in all the participating schools in the seven studies – and this is a reason why several of the research teams have added additional special needs education – and assistant staff in their projects. Therefore, there remains a question of what will happen to pupils, classes and schools when these research projects are concluded.

**The communication aspect** is divided into communication technology and relational communication. Inclusive communication technology concerns whether or not all pupils in a class are able to participate in mutual communication. In practice, it raises the question whether schools are able to meet this need when there are pupils who use different communication means, such as sign language, foreign first language or other kinds of alternative communication means. The Ljubljana study exemplifies the dilemma between choosing either a special class for pupils with hearing impairments or a mixed class, as long as the communication in the mixed class is disadvantageous for the pupils with hearing impairments. Relational communication challenges reported from the seven studies are summarised in three categories, namely a) too extensive use of one-sided monologue teaching or unitary teaching, as Alexander (2000) calls it; b) error-focused communication; and c) communication difficulties between educational staff and parents.

**Care for pupils** is challenged by the view that “schools should focus on academic education only and less on pupils’ psycho-social well-being”. This critical view of schools’ psychosocial responsibility is not, however, shared by the participating research teams and schools in this study. On the contrary, schools’ caring responsibility is seen as a necessary aspect of inclusion. Consequently, attention is directed to pupils’ individual psychosocial needs for support as well as their academic needs. A dilemma is indicated in the quotation: “Professionalism lies in striving to care even-handedly” (O), pointing to a double challenge:

- 1) The dilemma between educators’ time and priorities and considerations for all the single pupils may be due to a lack of human resources.
- 2) To care even-handedly challenges the ability to interact positively with *all* pupils.

Kristeva (2010; Johnsen, 2014d) argues that persons with disabilities may provoke unease and anxiety; they may be perceived as strangers. She points out that confronting persons with profound disabilities – specifically if they are mentally impaired – provoke unconscious and unresolved feelings of anxiety about one’s own vulnerability, awaking emotional defence mechanisms. This may happen in the meeting between teacher and a disabled pupil, especially if the teacher is not used to working with children with disabilities and has not been trained to interact with them. Likewise, Henning Rye (2001; 2005) points out that it is easy to interact positively with persons when we recognise their behaviour and way of being. However, when we perceive their behaviour and

communication as strange to us, we may become uncomfortable; our ability to interact positively is challenged. Accordingly, we need to reflect carefully in order to interact positively. However, these kinds of meetings or “confrontations” are the ones that we learn and develop from; as teachers and human beings (Rye, 2007; Kristeva, 2010; Johnsen, 2014d; 2020a). The Belgrade study reveals negative attitudes by some teachers, parents and pupils towards opening regular schools to pupils who have traditionally been in special schools and institutions. This negative attitude is partly explained by the fact that the principle of inclusion is rather new in Serbia, as it is in several of the other participating countries. How, then, is the opinion towards the inclusive school in Norway, where the special school and regular school acts were merged in 1975, almost fifty years ago? Debates about pros and cons of the inclusive school appear in the media on a regular basis, indicating that the idea of an inclusive school is still not perceived as an obvious principle. All participating countries seem to have this challenge.

As pointed out by the seven teams, schools’ caring responsibility is a necessary aspect of inclusion. All teams strive to reveal or even develop this aspect through exploratory studies and action research, showing great and nuanced efforts in their caring. They also indicate that educators’ care and dedication for pupils may turn into concerns. A number of concrete reasons for such concerns are presented in the studies. Why? The main reasons for worries are a) the gap between international and national intentions of inclusion and concrete opportunities to practice inclusion b) lack of human resources and c) lack of financial resources.

Summing up, in spite of different local conditions and variations in research designs, some dilemmas, challenges and barriers seem to occur in most or all of the seven studies. These include a) labelling b) negative attitudes towards pupils with special needs in ordinary schools and classes c) the gap between national educational principles and actual conditions for practice d) the lack of resources to enable inclusion e) limited knowledge and skills in teaching pupils with special educational needs in the ordinary school f) little if any focus on preparing future teachers for practicing inclusion as well as upgrading for practicing teachers g) too little research and innovation concerning inclusive didactics and curriculum: the problem of sustainability:

- a) The problem of labelling is mainly discussed related to tests, grades and special needs educational assessment, and also when it comes to other aspects of individual curricula that contribute to isolating single pupils – learning

content, teaching methods and organisational means – and hence contribute to educational segregation.<sup>51</sup>

- b) The research teams agree that negative attitudes towards pupils with special educational needs in ordinary classes occur in some teachers, parents and pupils. Few surveys have been implemented in order to give indications about the prevalence of this negativity, but the Belgrade team refers to a small-scale questionnaire where the occurrence of negative attitudes is reported.
- c) The gap between national educational principles and practical conditions in favour of educational inclusion is pointed out by all research teams.
- d) There is a lack of different kinds of resources enabling inclusive practices. One of the most urgent is the lack of special needs educators in schools and classrooms and limited opportunities for co-teaching in the classroom.
- e) The ordinary teachers participating in the seven studies demonstrate a high level of devotion towards developing inclusive practices. In several – but not all – of the studies, they are professionally guided and supported by special needs educators. Still, the general impression of most research teams is that there is an apparent lack of necessary knowledge and practical experience by ordinary teachers concerning teaching pupils with different special educational needs. Accordingly, ordinary teachers are insecure and reluctant to take on this task. An imperative question lurks in the background. How well are teachers prepared in their basic and further education to develop individual curricula and inclusive education; formally and practically?
- f) Research and innovation within the field of educational inclusion needs to increase.
- g) This joint research project demonstrates a number of inclusive practices. However, as pointed out, extra resources are used in order to secure special needs education cooperation, and in several cases special needs education. Important first steps have been taken in the direction towards inclusive education. Will the participating schools be able to maintain and continue this process in the continuation of the project? This is a question concerning sustainability.

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<sup>51</sup> Educational segregation occurs in the classroom due to a lack of relationship between individual and class curricula, while organisational segregation concerns physical isolation from the class or school.

## Two Urgent Important questions

An overarching question arises that applies to all participating studies and, consequently, to the participating countries: **What became of the competences of the special schools in the school for all?** Is the school for all just “allowing” pupils who have “different” psychosocial and educational needs to take part in the former regular schools? For an equitable fusion of special- and regular schools to be realised, special needs and regular educational competence need to merge. Higher education and research within special needs education takes place in all the countries participating in this comparative research cooperation. The participating teams represent either the field of special needs education (B, L, O, SM, T, Z) or regular education (S). Why, then, are permanent positions for special needs educators in every school for all not legally required?

Another urgent question arises from these studies of inclusive educational practices: **How is the negative mentality – this apparent “companion” to the opening of the society for all – addressed?** In order to give a brief contextual suggestion to some major efforts made toward solving this challenge, a few milestones from current history are mentioned in the following, mainly referring to international discourse and important steps regarding human rights.

Thus, the 1960s may be seen as a turning point towards societal awareness of the poor conditions for people with disabilities. It took place on two levels, first as a turning from institutionalisation towards normalisation (Bank-Mikkelsen, 1980; Johnsen, 2014f; Nirje, 1980; Wolfensberger, 1980<sup>52</sup>); then as a turn from segregation to a school for all and inclusion. This was a door opener for the participation of disabled people in society. The trend may be seen locally, nationally and internationally, but at different times in different countries – and not in steady progress, but as waves of “ups and downs”. The Norwegian turn within education, as mentioned, dates back to 1970 (KUF, 1970) and 1975 (Education Act, 1969 with amendments) when the special school law was abolished and ordinary schools were opened up to all children, includ-

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52 Since the concept of social normalisation is rarely used in current discourse – sadly, because there is still a large gap between principle and practice – there is reason to clarify it here with Nirje’s words: Normalization means sharing a normal rhythm of the day, with privacy, activities, and mutual responsibilities; a normal rhythm of the week, with a home to live in, a school or work to go to, and leisure time with a modicum of social interaction; a normal rhythm of the year, with the changing modes and ways of life and of family and community customs as experienced in the different seasons of the year (Nirje, 1980).

ing children with disabilities. Internationally, UNESCO's World Conference in Education for All (EFA) in Jomtien, Thailand in 1990 (UNESCO, 1991) is characterized as "a game changer for education in the world" (Dacca Retrospective post 2015). It was followed by a number of conferences, whereof the Salamanca conference introduced the principle of educational inclusion with the following statement:

More than 300 participants representing 92 governments and 25 international organizations met in Salamanca, Spain, from 7 to 10 June 1994 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 with special educational needs (UNESCO, 1994:iv).

The Convention on the Rights of Persons with Disabilities (2006) further strengthens the principle of inclusion. As documented, all countries participating in this international comparative research project have ratified the right to education of persons with disabilities and the principle of educational inclusion. Thus, the principle is established in laws and policies of all the six countries, as repeatedly pointed out.

**But what about practice?** All participating teams register that there is a gap between principle and practice. A main motivation for this international comparative research project is to explore this gap; to examine schools' mastery and opportunities to "fill the gap" with inclusive practices. However, different aspects of negative mentalities towards inclusion are, as reported, amongst the challenges to developing inclusive practices.

Negative attitudes are reported from teams in the countries where the development of inclusive practices is in the beginning phase, as well as from Norway, where the development has been underway over the past five decades. Uncertainty and scepticism were also noticed in the previous innovation project at the universities of Tuzla, Sarajevo and Oslo (SØE 06/02). In the context of the former project, the concept "school as a socio-emotional safe haven" was developed as one way of addressing this challenge. The metaphor referred to the UN safe havens established during the war (1992-1995), reminding participants in the school innovation that the principle of inclusion is a self-evident ideal, but vulnerable in practice. The content of the metaphor focuses attention on the need to create a socio-emotional secure educational arena for every pupil in the class, as a foundation upon which all other inclusive practices are based – the school should be a second home for all pupils without exception – an arena that protects

every pupil from socio-emotional attacks and traumas (Johnsen, 2007). Unfortunately, there is ample reason to believe that schools function contrary to being a safe haven for several pupils in different situations, as discussed in both the former school innovation project (2007) and this comparative research project.

Developing a school into becoming a socio-emotional safe-haven may serve as an aim in every society in every country. All too many children need a safe haven from negative socio-emotional conditions, however peaceful a country might appear. And, the essence of such a safe haven is care and sensitivity, as referred to above from several of the research teams. However, as discussed in the 2007 report, there is ample reason to believe that several schools cannot fulfil this ideal. Hence, the project report was given the subtitle “Good Examples and Difficult Dilemmas” (Johnsen, 2007). As mentioned, this international comparative study is inspired by the experiences described and discussed in the 2007-report.

What lessons are drawn from the former innovation project in this comparative research project? How is the problem of negative mentality – this apparent “companion” to opening of the school for all – addressed here? Several findings address this challenge, as indicated in the following:

- a) Research teams that are confronted with reluctance and negative mentality in the preparation phase of their study find alternatives. Thus, some of the teams have used considerable time and efforts in selecting willing partner schools.
- b) Findings within all the seven areas of the schools’ inner activity address challenges related to the development of inclusive practices. Some of the challenges seem to stem from negative attitudes.
- c) The problem is also addressed through a strong emphasis on the importance of holistic knowledge of individual pupils, on relational communication, care and sensitivity, indicating specific attention given to activities that may contribute to decreasing insecurity and scepticism and increasing knowledge, with accompanying positive attitudes towards the inclusive class.

There is great diversity and different degrees of severity of phenomena that are perceived as negative or obstacles to the development of inclusive practices by the research teams. A severe lack of resources to develop and realise educational inclusion is evident in all participating countries. The third, and no less problematic, obstacle is the lack of awareness for making necessary changes to the traditional structure of the ordinary schools in the direction of an inclusive school.

## 12 International classroom studies of inclusive practices in light of pedagogical traditions and ideas

As documented in the joint research plan (Johnsen, 2013a), this international comparative study is based on selected theoretical traditions and studies within a) ordinary- and special needs education fields of specific relevance in classroom and inclusion discourse as well as b) relevant research methodology. Robin Alexander's major comparative work, *Culture and Pedagogy* (2000), and his further discussions of content, structure and research methodology in international comparative pedagogical research (2004; 2009) are of particular importance and support for this work, as briefly mentioned in the introduction chapter. Accordingly, his theory as well as his international comparative classroom studies are further discussed in light of this study in the article *Comparing Classroom Activities* (Johnsen, 2020d).

Alexander elaborates on an approach which he calls international comparative pedagogy (not education), pointing out his interest in studies of the many aspects of teaching-learning processes. Studies of activities taking place on the micro level – within schools and classrooms – are his point of departure and prioritized research area. However, in order to situate findings on the micro level within different cultures and avoid naïve borrowing, Alexander (2009) develops a framework dealing with three aspects: a) the previously mentioned teaching-learning activities on the micro level b) pedagogical ideas, values and beliefs, and c) curriculum from the macro to micro level with intermediate levels in a broad sense. He argues that each of the three levels may need different methodological tools. How does Alexander apply these ideas in *Culture and Pedagogy* (2000)? Starting with an account of the contexts of the selected schools, he and his team describe educational systems, policy and history separately for each country, France, Russia, India, the United States of America and England. However, in the larger part of the study, when describing and discussing classroom activities, they apply another structure. Here, findings from all the five countries are discussed in a cross-cultural comparison (Alexander, 2000: 265). The discussions are structured in accordance with a model or set of predetermined main aspects based on Alexander's urge to develop a holistic yet multifaceted construction of teaching-learning processes found in the schools of the five countries. Alexander's (2000: 325; 2004; 2009) general or generic model of teaching consists of

the following main categories or aspects with sub-aspects: Frame – Form – Act. Each aspect is selected through a line of reasoning. However, Alexander (2009) is open towards a variety of ways to apply the aspects in research. He states that it is a matter of choice:

- a) what research questions to formulate or what to explore
- b) how to analyse each of them
- c) what kind of sub-aspects to construct if any
- d) what research methodologies are relevant
- e) what kind of research tools are useful in order to answer the selected questions

Thus, Alexander's framework for comparative pedagogy is a flexible framework, or construction, suitable for being applied to a variety of relevant research issues. Several of the aspects he discusses support the construction of this joint comparative research project. Therefore, his texts are highlighted (Johnsen, 2020d). However, Alexander's texts are not the only ones inspiring and supporting this study as documented in the research plan (Johnsen, 2013a) and in this report. *Inclusive Practices* is also discussed in light of the following aspects:

- The role of pedagogical ideas, values and beliefs in international comparative pedagogy
- On what traditions is the study based?
- How are the traditions accounted for?
- What role are they given in the study?

## **The role of pedagogical ideas, values and beliefs in international comparative pedagogy**

One of the three aspects Alexander (2009) develops in order to situate findings on the micro level within different cultures concerns pedagogical ideas, values and beliefs (Johnsen, 2019d). Which research fields and traditions form the basis for this study? Firstly, this study is placed on the crossroads between the two research fields, special needs education and ordinary education as well as international inclusion discourse. Each of these three fields are found in several traditions; as do most research fields. The following questions concerning this study are therefore: a) on what traditions is this study based b) are they explicitly accounted for, and c) what role are they given in the study?

**On what traditions is the study based?** Three main pillars constitute the basis for this study, as accounted for the joint research plan (Johnsen, 2013a). They are a) Vygotsky's cultural-historical school b) resource-based approach to communication and mediation, and c) a didactic-curricular relation approach to educational and special needs educational practice and research.

**How are the traditions accounted for?** The joint research plan (Johnsen, 2013a) establishes that this is a study of interaction between regular and special needs education in the development of inclusive practices at school. Educational inclusion requires cooperation between the teacher and special needs educator in order to focus on mastery, abilities and need for support of all individual pupils, in turn enabling the class to function as a common learning arena for the diversity of its pupils. Vygotsky and post-Vygotskian scholars' cultural-historical theories and studies hold a holistic view of the interaction between teaching, learning and development within different diachronic or historical and synchronous or simultaneous cultural frames. The cultural-historical school therefore emphasizes in particular the importance of analysing schools' inner activity in view of different cultural traits. Another core property of the cultural-historical theory is that it does not isolate learning and development to a matter between the individual pupil and learning tasks, but focuses on the teacher's and special needs educator's responsibility as mediators in the process of learning and development. This is briefly discussed in this presentation and discussion of findings above.

Communication is focused in the cultural-historical school. It is also a main aspect in the emerging resource-based approach to communication and mediation. This approach, which is also called relational pedagogy (or -psychology, by psychologists) is currently gaining increasing interest. The approach is briefly mentioned in the joint research plan as part of Post-Vygotskian theory. Along with the cultural-historical emphasis on communication, the approach is also based on attachment theory, humanistic theory and pedagogy of care. Hence, the resource-based approach to communication and mediation contributes to the relational communicative and caring aspects of inclusive education, which are discussed in detail in the article *Care and sensitivity in upbringing and education – An introduction to related core concepts in selected resource-based interaction traditions* in this anthology (Johnsen, 2020a). Thus, resource-based relational pedagogy is closely connected to care and relational communication; it is also interrelated with the other didactic-curricular main aspects.

The third pedagogical pillar, didactic-curricular relation approach to educational and special educational practice and research, is given considerable space in the joint research plan (Johnsen, 2013a). The approach has been “piloted” in a former joint innovation project between the universities of Sarajevo, Tuzla and Oslo (SØE 06/02, 2002). Details regarding lectures, school innovation activities, joint reporting and discussions between teachers, special needs educators and researchers are described and discussed in the innovation report *Razred u pravcu inkluzije – The Classroom towards Inclusion – Good Examples and Difficult Dilemmas* (Johnsen, 2007). An article explaining and discussing the didactic-curricular approach is published in Johnsen (2014b). The approach permeates the entire report concerning both structure and content.

## What role are the three pedagogical pillars given in the study?

**Cultural-historical theory** may be seen as a counterpart to mainstream theory on development and learning. Mainstream developmental theory, with Piaget as the outstanding theorist, focuses on the relationship between learner and learning task. It also postulates, “Development comes first”, namely that the ability to learn depends on the developmental stage of the learner (Ginsburg & Opper, 1969). One of Vygotsky’s core concepts is the Russian term *obuchenie*, which has been incorrectly translated to “learning” in popular English translations. However, Russian scholars point out that *obuchenie* means “teaching and learning”. Thus, Vygotsky describes the learning process as an interaction process between teacher and learner. In his line of argument, learning relates to the collective society through the pupil’s communication with teacher, caregiver and more knowledgeable peers – and through other mediating means. He also argues that development stems from learning of higher mental functions and points to language or arithmetic as examples. Another important point in his theory construction concerns what he calls the “learning of yesterday”, which are learning tasks that are already internalised and automatically in use, and the “learning of tomorrow”, which are meaningful new learning tasks. He argues that mediation should focus on the learning of tomorrow or, as he calls it, the “zone of proximal development”. Vygotsky worked with children on different levels of mastery, including specific disabilities such as hearing impairment and intellectual challenges. He was therefore well aware of the diversity of different individual levels of mastery (Daniels, 2014a; Johnsen, 2014c). And he argues that

of all the children who need teachers or mediators to support their learning and development, children with disabilities – especially those who have intellectual challenges – need most help from the teacher for their developmental process. Most children, he points out, manage to transform learning to development. However, children with intellectual challenges are in dire need of a teacher who has the specific knowledge that is needed to support them in this transformation (Vygotsky, 1978:89). Vygotsky’s perspective on teaching, learning and development thus forms a common foundation for observations, descriptions and discussions in this international comparative study with emphasis on the following main aspects:

- The teacher’s responsibility as a mediator is established with the central concept of *obuchenie* – teaching and learning.
- The importance of special educational knowledge in order to be able to support pupils with special educational needs is highlighted. Vygotsky applied the term “defectology”, which was a widely accepted term for impairment and special educational needs in his time.
- Development of credible explanations of a) the relationship between learning and development; b) the diversity of individual differences in level of mastery; and c) the importance of exploring the individual pupil’s proximal zone of development.
- The importance of peer collaboration in the community of the class

These aspects are all central parts of individually adapted education. They have been and are being followed up and developed further by current scholars within the cultural-historical tradition.

**Resource-based approach to communication and mediation** is closely related to the cultural-historical school and applies its emphasis on communication and mediation in a specific direction that is also grounded in two additional related approaches: a) The increasing focus on attachment studies between caregiver and child from birth and onwards during the last decades demonstrates the child’s urge for interaction with caregiver and documents the importance of these communication processes, as shown by Trevarthen (2014) and other scholars within this rather new and multidisciplinary research field. b) Similarly, the pioneer scholars, Martin Buber (1878-1965) and Carl Rogers (1902-1987) have laid the foundations for a humanistic pedagogy and therapeutic philosophy focusing on dialogue and relation building. The two closely related approaches direct the attention towards positive commu-

nication and mediation, based on the child's mastery level and possibilities or resources. The resource-based approach to communication and mediation based on the abovementioned theories is applied in dialogue groups of parents and other caregivers, for instance teachers and special needs educators, in the *International Child Development Programme*, developed by Hundeide (2010) and Rye (2001; 2005; 2007). They situate their resource-based approach to communication and mediation within relational pedagogy. The approach is embodied in care and relational communication. As discussed in Johnsen (2020a), there is currently rising interest for care within pedagogical traditions. Nel Noddings is a pioneer within this discourse, challenging the school to care (1992; 2002; 2003). The resource-based approach to communication and mediation is thus amongst contributing approaches to the important role of care and relational communication in this research project. They represent a special needs didactical contribution towards inclusion and are thus given central positions already in the planning phase (Johnsen, 2013a). One of the surprising findings of this international comparative research project is the massive focus on relational communication and care reported by all participating teams, as documented above.

**The didactic-curricular relation approach** to educational and special needs educational practice and research is by far the most central of the three main pillars of these classroom studies of inclusive practices; Indeed, it is a main contributor to the construction of the studies. Before the role of the didactic-curricular relation approach is described in more details, the term "didactic-curricular relations" should be shortly clarified. While the term "curriculum" tends to be associated with national regulations in Nordic countries, American curricular theory has a more dynamic tradition, using the term on different levels from national to individual usage. Didactics is seldom used in English discourse and, when used, often with negative connotations. However, in the continental European tradition, including the Nordic, the term "didactic" is used in relation to individual and classroom practice and theory. Hence, in this international comparative study the two concepts, curriculum and didactic, are used similarly, even though they are applied with somewhat different starting points and used unevenly in different contexts (Johnsen, 2001a; 2014b).

The didactic-curricular relation approach deals with practice, theory and research on practice, focusing on internal practices at school. First of all, the approach is a practical tool for teachers and special needs educators:

- as a guide to long-term as well as short-term curricular or didactic planning
- as a framework for systematic work in planning, implementing, assessing and revising the relationship between teaching and learning for individual pupils as well as for groups and whole classes

It is also a research approach serving as a tool to operationalise research issues through deciding, clarifying, delimiting and interrelating main aspects of focus in classroom studies. This is how the approach is applied in these international comparative studies. The didactic-curricular relation approach is illustrated by the model consisting of seven + one didactic main areas or aspects, as shown in the introductory chapter:

The pupil/s – assessment – educational intentions – educational content – educational methods and class organisation – communication – care + context or frame factors

Seven of the areas belong to schools' inner activity or micro level (cf. Alexander, 2000; Johnsen, 2014b). Thus, they constitute the main areas in the exploration of teachers' and special needs educators' planning, practicing, assessing and revising of the teaching-learning processes for individual pupils and the community of the class. Hence, in this research on practice, the main areas function as focal points for exploration and as main categorisations of findings. The category context represents the macro level (See Alexander, 2000; Johnsen, 2014b).

The didactic-curricular concepts representing the areas and the connection between them have changed in the development of the approach throughout the years. Interestingly, as a result of dialogue with Master-level students in special needs education, the concept of pupil/s was moved from the didactic circle to the midpoint of the model, placing the pupil/s at the centre of the teaching-learning relation, inspired by Dewey's account of child-centred education (Johnsen, 2007). How did John and Evelyn Dewey account for this educational principle?

Dewey saw the child as the centre of the educational process in the sense that it is he for whom education is intended. He becomes the basis for the selection and timing of subject matter and experiences. He is not the curriculum, nor does he intentionally and actively determine it, but it is planned in reference to him instead of to factors, which are extraneous and unrelated to him (Dewey & Dewey, 2015, in Gallant, 1973: 412).

Dewey's description of the pupil at the centre of curricular planning that is performed by the educator, supports the logic of exploration in this study: In the didactic-curricular relation approach, the model is a working tool for the

educator. This logic is also in accordance with Vygotsky's arguments for the educator's responsibility to facilitate teaching in accordance with the pupil/s' readiness to learn, as pointed out.

The five topics or aspects – pupil/s, assessment, educational intentions, educational content, methods and classroom organisation – are classical categories with roots going back to Plato and ancient Greek tutorial tradition. They are also commonplace categories embedded in a shared European educational heritage (Johnsen, 2000).

Two new topics, communication and care, have been awarded the same attention as the classical concepts in an effort to investigate their role in planning and implementing teaching in accordance with the diversity of all pupils' individual and education needs (Befring, 2001; Johnsen, 2001a; Noddings, 1992; 2003). They are placed between the circle of the classical didactic-curricular aspects and the pupil/s in order to illustrate the relational nature of individually adapted teaching or pupil-centred teaching. Findings related to all seven aspects of schools' inner activity are described and discussed in the chapters above.

The seven aspects relate to the eighth main aspect, namely context or frame factors, which directs the attention to relations between individual and class curricula on the micro level and contextual aspects on the local, national and even international level as well as in comparison between different countries and cultures, as in this study. Contextual frame factors are seen as elements creating opportunities and barriers for teaching and learning. This eighth topic was introduced to the field by scholars in educational ecology, such as Bronfenbrenner (1979) and Goodlad (1979), as discussed in the above chapter on context. The contextual aspect is also of importance in Alexander's (2009), international comparative pedagogy as the third of three levels – from the activities on micro level; through pedagogical ideas, to the macro level. He calls this structure “curriculum from micro to macro level with intermediate levels” in a broad sense. In his comparative study (2000), he describes educational systems, policy and history separately for each country, while in *Inclusive Practice*; information from all participating countries is gathered, described and discussed in the chapter on context. The information about each of the participating countries and the universities of Belgrade, Ljubljana, Sarajevo, Skopje, Tuzla, Zagreb and Oslo are further categorised in the following aspects:

- Common international principles
- European welfare states with different current history

- Legislative and political frame factors
- Financial resources
- Physical frame factors
- Human resources
- Higher education within education and special needs education

While the seven contextual accounts do not give a full description of contextual similarities and differences, they do contribute to indications. They give the reader a possibility to compare the reported findings within the seven main areas of the inner activity of the class in view of these contextual aspects. Moreover, they serve as a reminder not to compare details from reported findings within the schools' inner activity directly or naïvely. This said, the many similarities between the seven studies have come as a surprise given the considerable contextual diversity.

## **Inclusion debates related to ordinary and special needs education**

The idea of educational inclusion is emerging at a time with segregated school systems divided into so-called ordinary schools for the vast majority of pupils and special schools and institutions for small and diverse minorities; pointing towards major changes in both types of schools. Hence, among the participants in the inclusion discourse, we find representatives of both ordinary and special schools as well as of other fields. Looking back a few decades, the turn towards inclusion may be described as a slow-speed turning operation starting with the normalisation principle (Bank-Mikkelsen, 1980; Johnsen, 2014f; Nirje, 1980; Wolfensberger, 1980) followed by the modern construction of 'the school for all' and integration (Johnsen, 2014f; KUF, 1970; Education Act, 1969 with amendments, 1975), and affirming the turn with the introduction of the principle of inclusion (UNESCO, 1994) as described above. However, the gap between the somewhat general principle of inclusion and actual practice has been and still is considerable. Several different and even contradictory arguments circulate in the debate on both principle and practice. These focus mainly on a) international and national policies on macro level; b) psychosocial inclusion; c) academic inclusion; or d) too seldom (?) a combination of these. In many cases, the arguments are based on an understanding of ordinary schools; and yet, they are also put forward

from the field of special needs education. Thus, Booth (1998) argues that special education is a barrier to inclusion. On the other hand, Kotte (2017) documents in her PhD research that teaching all pupils in a diverse classroom causes serious challenges for the individual classroom teacher. In a similar way Allan (2008) elaborates on teachers' confusion, frustration, guilt and exhaustion over classrooms having too great a distance between pupils' psychosocial and academic needs, and who, due to "untenable diversity", do not manage singlehandedly to create a meaningful teaching-learning process for all. These are examples of discussions about incomplete attempts at inclusion where either of the two closely related fields – ordinary- or special needs education – are made invisible, rejected, missed or highlighted. In her 2010 article, Allan considers the uncertainties surrounding inclusion and the questions coming from researchers, teachers, parents and children of why "it is so difficult to *do* inclusion" (Allan, 2010: 200). The following are among her objections:

- teachers' uncertainty and lack of knowledge about teaching "the new pupils in the inclusive class"
- the focus in the inclusion debate tends to be one-sidedly on the pupils with educational difficulties and disabilities – not the whole class
- special needs education and defectology use "deficit-oriented language"
- the capacity of the education system – and the teachers within it – do not seem to be able to 'deliver' inclusion

Allan's criticism indicates some of the worries pointed out in this joint research project such as a) the occurrence of negative mentality towards inclusion, or the confusion, frustration, guilt and exhaustion of researchers, teachers, parents and children, as she points out; and b) the dilemmas related to assessing pupils' level of mastery and the danger of negative labelling.

However, the position of this research project is that:

- educational inclusion embraces all individual pupils in the community of the class with or without special educational needs
- special needs educational knowledge and skills are necessary in order to achieve inclusion in "the school for all"
- educational inclusion needs to be based on cooperation between ordinary teachers and special needs educators
- this joint research and findings are based on Vygotsky's and the culture-historic school's focus on the teaching-learning-developmental process

(Chaiklin, 2003; Cole, 1996; Ivic, 2014; Johnsen, 2014c; Rogoff, 1990; Vygotsky, 1978; 1987; Wertsch, 1984), resource based communication and mediation (Johnsen, 2014b; Rye, 2001; 2005) and care (Johnsen, 2020a; Noddings, 1992; 2002; 2003).

Together with Slee, Allan (2001: 180) argues for the necessity of “daring to think otherwise”. Educational inclusion can neither function as an extension of ordinary classroom pedagogy nor of special needs education; therefore, deconstructing traditions in the two fields is necessary. As indicated above, this joint research project acts as a contribution to doing so. Deconstructing traditions concerns special needs education and defectology, ordinary education and – first and last – traditional organising of ordinary schools with their “one class with one teacher”-construction. Similar to Julia Allan, the focus of *Inclusive Practices* is on the gap between the international principle of inclusion and practice. The multifaceted findings of the seven different studies within the joint didactic-curricular frames represent steps towards reconstructing inclusion (Johnsen, 2014d; Kristeva, 2010); away from educational inclusion as an addition to traditional ordinary schooling and towards a new construction of a school for all that practices inclusion. A new pedagogy must emerge in the revision of ordinary and special pedagogical knowledge through alternative research approaches. Likewise, Barbara A. Coles' (2005) practice analysis also concludes that a complete reversal of “taken-for-granted truths” is needed to develop inclusive practice in school. She points out that educators need to keep “all roads open” and have professional humility to make the individual child's needs central. In Narayan's (2011) case study, the intentions are to create a community of practice of equality and care; a diverse student community with mutual involvement and common activities and repertoire in line with cultural-historical tradition and relational pedagogy. There is general agreement that inclusive pedagogy is about both social and educational inclusion, even though in Narayan's example, the consideration of these two aspects appears to overshadow each other at the expense of the school education. Her problematisation is supported by Cole, who concludes her practice study as follows (2005: 341): “Inclusion was a multifaceted and difficult process, which, although it can be defined in political rhetoric, was much more difficult to define in reality”. Although differing slightly, Slee and Allan (2001), Cole (2006), Narayan (2011) and this international comparative classroom research project have common reasons for exploring the complexities of inclusive classroom practice.

## 13 Methodological considerations

The overall intention of *International Classroom Studies of Inclusive Practices* is to provide a body of descriptive and explanatory data that demonstrates various practices related to the development of educational inclusion in the participating cultures. The principle of educational inclusion was introduced officially in the Salamanca Statement (1994) and is accepted by all participating countries. Inclusion is thus at the centre of this research project, which has been planned and implemented by seven teams from six European countries, all having similarities and diversities to one another. This research cooperation is at the same time a challenge and vital element of international comparative educational research (Johnsen, 2013a; Phillips, 1999). A number of methodological considerations have been made from the beginning and throughout the research process. Considerations in the planning process are presented and discussed in the first of three anthologies connected to the common research process; *Research Project Preparation within Education and Special Needs Education* (Johnsen, ed., 2013). Joint decisions and reflections are presented and discussed in the research plan (Johnsen, 2013a). In addition, each of the seven research teams present their research plans in individual articles (Igrić & Cvitković, 2013; Jachova, 2013; Johnsen, 2013b; Kogovšek, Košir & Ozbič, 2013; Rapaić, Nedović, Stojković & Ilić, 2013; Salihović, Dizdarević, & Smajić, 2013; Zečić, Čehić, Kristiansen, & Hadžić, 2013). The methodological considerations in the research plans may be characterised as outlined expectations. Now, retrospective of field studies and joint summary of findings, it is timely to examine whether and, if so, how methodological expectations are satisfied. This applies to the quality of research. Two key aspects of this international comparative classroom research need specific attention, namely the questions of evidence and comparing qualitative studies. In the following four main aspects are discussed:

- Joint research issue and structure
- Choice of design and methods
- The question of evidence
- The problem of comparing qualitative studies

### Joint research issue and structure

There is one joint main issue in this common research project, stated as the question: How do schools teach in accordance with their pupils' different lev-

els of mastery and needs for support in their learning process (resources, barriers and dilemmas)? Focus is directed towards the inner activity of schools and on teachers' activities in the teaching-learning interactions with every pupil in the class. There is a common understanding that by "teacher" is meant the individual classroom teacher and – if available – co-teachers, special needs educators and assistants in the class in addition to schools' internal resource teams. This issue, when combined with abovementioned eight main areas or aspects, constructs a joint framework for description, comparative analysis and discussions of the participating classroom studies. The areas are the pupil(s) – assessment – educational intentions – educational content – class organisation and teaching methods – communication – care – contextual factors. They represent a holistic didactic-curricular approach to classroom practice and -research, and have been selected as joint main categories for information gathering in order to explore, describe, analyse and discuss the issue. Within this framework there is flexibility concerning choices the research groups take in the process of operationalising and delimiting their concrete studies, such as:

- number of pupils participating in the study
- type of special need/disability/vulnerability of pupils in focus
- which of the eight topics to study in depth and which ones treated as background factors

Accordingly, the main issue and the eight didactic-curricular main areas construct the structure of the joint presentation of the seven participating classroom studies' findings. Thus, eight of the chapters in this report represent one of the didactic-curricular areas each.

During the planning process, it was expected that some of the areas of exploration would be main topics in several or all of the seven studies, whereas others would remain in the background. Hence, it was foreseen that hearing impairment and other aspects related to communication would be at the forefront of several studies. This has turned out to be the case. However, it has come as a surprise that all the seven aspects related to schools' inner activity are covered and reported on by all research teams with one exception. Care is a rather new main aspect within the didactic-curricular approach, and thus, it has been difficult to predict how much attention it would get. However, care is in the foreground of all the seven studies. This strongly indicates that care is a necessary and important requisite in inclusive schools.

## Choice of design and methods

Case study design is the main approach utilised in this research project. Case studies have a strong tradition within classroom studies, and qualitative research methodology in general is widely used in special needs education. During the planning process, a selection of relevant studies focusing on classroom practices were examined with regard to methodological aspects (Hjulstad, Kristoffersen & Simonsen, 2002; Klette, 2003; Moen, Nilssen & Postholm, 2005; Sehic, Karlsdóttir & Guðmundsdóttir, 2005).

This joint classroom research project primarily focuses on good examples, more specifically a) on investigating schools' available resources and ability to develop inclusive practices and b) on analysing them related to the dilemmas and challenges encountered in their socio-cultural settings. The participating university teams have purposefully selected "good" schools. Thus, within the abovementioned framework, each university specified further research questions, operationalised research topics, and selected relevant methods, instruments and informants as well as the relevant documents involved. The applied methodological approaches and methods are summarised in Johnsen (2014a) and in the introduction to this report. The presentations show a diversity of related methodological approaches and designs; single and multiple case studies, action research and a pilot study, mixed methods and longitudinal studies. The most widely used methods are interviews and observations, often in combination. In addition, document analysis and analysis of other texts and materials are used.

## The question of evidence

The question of evidence belongs to methodological disagreements in educational and related sciences. It appears that the privileged understanding of "what works" or standards of evidence are limited to the following type of research in public debate as well as in some research groups:

"... favouring those (...) that have been evaluated to a very high standard using the most robust evaluation methods, such as randomised controlled trials or quasi-experimental techniques, and ideally summarised in systematic reviews"

*(Allen, 2011: 69)*

This conceptual description delimits the understanding of research evidence to natural-science inspired quantitative methodology. Where does that leave research based on qualitative methodology? Within the scientific commu-

nity, there is also another tradition for assessing research quality that stems from the mid-1970s – at a similar point in time as the development of criteria for evidence within quantitative methodology took place (Johnsen, 2020c). Rich (1975:329) argues that “... the prevailing model, which we call “scientific behavioural” thinking, is not entirely appropriate for fruitful thinking and research in education”. He offers an alternative approach to studies of educational practices that is an idiographic holistic approach focusing – not on “uniformities and regularities of a whole class of objects”, as quantitative research does – but on understanding the individual pupil “as a unique being, rather than a specimen of a class” (Rich, 1975: 330). Rich’s methodological approach draws attention to an understanding of educational practice that is based on Martin Buber’s (1947) humanistic “I-Thou” philosophy, and his quest for an inclusive relationship and apprehension of the pupil as a holistic and complex individual within a cultural context (Johnsen, 2014b; Rich, 1975). Thus, Rich carries forward the idiographic, or qualitative research tradition, one that has been growing in recent decades. Several scholars have discussed and refined methodological aspects of qualitative research, such as Stake (1995), Denzin (2009) and Creswell (2007), to mention three outstanding scholars. Inspired by Stake (1995), Simons (2015: 176) argues that an in-depth case study is well qualified to catch idiographic evidence:

The case will be richly described and evidence-based, in the form of observations and perspectives of stakeholders and participants, significant incidents, narratives and critical analysis of any relevant documents.

Currently, the increasing use of qualitative studies is accompanied by an urge to develop “the quality of qualitative research”. This is important within educational sciences (Creswell, 2007; Northcote, 2012; Tracy, 2010) as well as other fields such as medical sciences (Collingridge & Gantt, 2008), where quantitative methodology traditionally has a very strong position. Accordingly, there is also an increasing focus on qualitative validation procedures. Refining qualitative methodology is thus a topic of growing interest. This includes the question of evidence. McBrien (2008) points to four techniques that contribute to the validity of qualitative studies, namely member checking, peer debriefing, audit trial and reflectivity. He argues that these validation techniques contribute to enhancing credibility, trustworthiness and rigour of the research process as well as its outcome, and therefore are well fit as criteria for evidence-based qualitative research. Different scholars within qualitative methodology emphasise slightly

different criteria of evidence. However, it seems that most of these criteria may be seen as aspects of the two complementary main concepts, *trustworthiness* and *authenticity*. Guba (1981) describes the main traits or criteria for trustworthiness as a) credibility, b) confirmability, c) dependability, and d) transferability, while the main characteristics of authenticity are i) fairness, ii) ontological authenticity, iii) educative authenticity, iv) catalytic authenticity, and v) tactical authenticity (Johnsen, 2020c; Lincoln & Guba, 1986; Schwandt, 2007). Therefore, the question of evidence in the joint research project has been attempted to be answered through examining the trustworthiness and authenticity of the findings in this research report.

***Trustworthiness.*** How is trustworthiness accounted? Does *Inclusive Practices*<sup>53</sup> meet the hallmarks of a valid, holistic and nuanced presentation of the phenomena in focus of this research? Do the research purpose, construction and findings of the project deserve trust? In the following the four aspects of trustworthiness – credibility, confirmability, dependability and transferability – are considered one by one, starting with a short description of the focus of each of the four criteria and moving on to consider the three research phases: planning, implementing and presentation of findings in *Inclusive Practices* (Guba, 1981; Johnsen, 2020c).

**Credibility** concerns “the truth value” of a phenomenon or if a study is perceived as “true” or valid of researchers as well as practitioners, who in the case of *Inclusive Practices* are not only the seven research teams and educational staff, pupils and parents of the schools that have been selected for the studies, but also peer researches, politicians and others who can make use of it (Guba, 1981; Moon et.al., 2016). Credibility spans planning, implementing and research report and is the most extensive of the four aspects of trustworthiness.

*Preparation and planning phase.* The question of credibility of planning concerns whether the intended research purpose and construction of the joint research project is perceived as meaningful to all participants (Moon et. al., 2016). This includes what Tracy (2010) points to as a worthy topic, namely if it is perceived as relevant, timely, significant, interesting and – first and foremost – useful

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53 Examination of trustworthiness in this report is delimited to the joint research activities and decisions documented in the common research plan and the process of gathering, structuring and presenting findings in the compilation of the report. The underlying level in this research cooperation consisting of the seven single studies is accounted for in separate articles.

(Johnsen, 2020c) to researchers as well as practitioners. In the case of this joint international research project, it emerged as a possibility in the continuation of a several years' preparatory phase, where key participants became professionally and scientifically familiar with each other during a school innovation project aiming at developing individually adapted and inclusive practices in the joint classroom – the same phenomenon that is studied in this research project. Hence, the former project contributed strongly to a joint perception of meaning and commitment, and was in this way part of the preparation for the current research project. The following aspects contributed to the research plan: i) the abovementioned long-time preparation in the former project; ii) research planning; iii) developing theoretical foundation; and iv) joint flexible methodological approach.

- Preparation over several years: Preparatory innovation project towards inclusion in Bosnia and Herzegovina (SØE O6/02)
  - ▶ Trying out, discussing and developing together the curricular relation approach with focus on developing individually adapted education in the community of the class
  - ▶ Bosnian researchers and innovators invite colleagues from Macedonia, Serbia, Croatia and Slovenia to conferences and seminars on behalf of the SØE o6/02 project together with additional funding
  - ▶ An innovation report in the Bosnian and English languages, *Razred u pravcu inkluzije – The Classroom towards Inclusion – Good Examples and Difficult Dilemmas. Report from a series of workshops in Bosnian schools* (Johnsen et al, 2007), describing the innovation process, is delivered to colleagues from each of the universities that were invited to participate in the current research project, offering insight in the didactic-curricular approach and -model that is later used in the joint research project
- Planning the international comparative classroom study towards inclusion takes place in the application period for inter-European cooperation (Johnsen, 2013a; WB 04/06, 2006). As mentioned, the project plan contains the joint research question and structure of the joint research based on seven didactic-curricular main aspects that constitute a common umbrella or frame for studies, comparative analysis and discussions of the inner activity of schooling, or the internal micro dimension, as Alexander (2000) calls it:
  - ▶ Joint main issue or -question: How do schools teach in accordance with pupils' different levels of mastery and needs for support in the learning process (recourses, barriers and dilemmas)?

- ▶ Joint structure based on the seven didactic-curricular main areas for information gathering and categorisation in order to describe, analyse and discuss the issue. The areas are: The pupil/s – assessment – educational intentions – educational content – class organisation & teaching methods – communication – care – and in addition the eighth area, context, embracing the seven areas of the inner activity of schooling.
  - Within this frame there is flexibility concerning the research teams' individual choice of focal areas in the study of teachers' activities related to a) number of pupil/s in focus; b) kind of special need/disability/vulnerability in focus and c) which one/s of the eight topics to study in depth (in the foreground of attention), and which ones to remain background aspects (Johnsen, 2013a; 2014b)
- Theoretical foundation: An eclectic selection of the following related theory- and research traditions make up a common framework as described in the joint research plan (Johnsen, 2013a):
  - ▶ Study of interaction between regular and special education in the development of inclusive practices in schools
  - ▶ “Cultural-historical” approach to teaching, learning and development in context
  - ▶ Inclusive practices from a didactic-curricular perspective
- Joint, flexible methodological approach:
  - ▶ As mentioned, case studies have a strong tradition within classroom studies. In this joint research project case studies are the most applied methodology, but with variations between ethnographically inspired qualitative methodology, mixed methods and action research approaches (Johnsen, 2013a; 2014a)
  - ▶ Qualitative international comparative studies focusing on preventing educational borrowing through applying contextual descriptions and discussions related to the seven classroom studies (Johnsen, 2013a; 2014a)

The joint research plan has been adapted by each of the seven research teams to their own plans in accordance with the common frames and flexibility of the plan, as described above. This indicates that the joint research plan together with the individual adaptation is perceived as meaningful and thus credible to all participating research groups (Igrić & Cvitković, 2013; Jachova, 2013; Johnsen, 2013a; 2013b; Kogovšek, Košir & Ozbič, 2013; Rapačić, Nedović, Stojković & Ilić, 2013; Salihović, Dizdarević & Smajić, 2013; Zečić, Čehić, Džemidžić Kristiansen & Hadžić, 2013). The research teams perceive

the preparation and adaptation phase as meaningful and credible, as a result moving forward in the study.

*Implementation phase:* Guba (1981) points to a number of procedures that may be used during field studies in order to strengthen the credibility or “truth value” by preserving a holistic presentation of the phenomenon in study. Several later discussants of qualitative methodology follow Guba with detailed descriptions of procedures. Some of the recommended procedures are used in the seven studies, including a) triangulation of methods b) member checks c) prolonged engagement in the field with cases of longitudinal studies d) observations of phenomena in focus as well as in context, leading to: e) thick descriptions of the studied phenomena. The procedures are used to omit biases and strengthen joint perceptions of the truth-value or credibility of the classroom studies by all participants (Collingridge & Gantt, 2008; Creswell, 2007; Creswell & Miller, 2000; Guba, 1981; Moon et.al, 2016; Northcote, 2012; Tracy, 2010).

Additionally, two joint activities are important contributors to strengthening the perception of common understanding amongst the seven research teams, i) and ii):

- i) Rotating conferences and seminars with outstanding international scholars are held. Each scholar has been selected to introduce important theories or research methodological aspects throughout the implementation period:
  - ▶ The Sarajevo seminar: Professor Tone Kvernbekk discusses theory of science and writes two articles in Anthology no 1 (Kvernbekk, 2013a; 2013b)
  - ▶ The Skopje seminar: Professor Harry Daniels presents and discusses use of methodologies to answer different research questions. He writes two articles in Anthology no 2 (Daniels, 2014a; 2014b).
  - ▶ The Tuzla seminar: Professor Sangeeta Bagga-Gupta presents examples of articles in special needs education and writes an article in Anthology no 2 (Bagga-Gupta, 2014).
  - ▶ The Beograd seminar: Professor Ivan Ivić and Professor Kirsti Klette. She presents and discusses a systematic didactic categorisation system developed through a series of studies.
  - ▶ The Oslo seminar: Professor Ivan Ivić and Professor James Wertsch discuss the Cultur-Historic school of teaching, learning and development. Professor Ivan Ivić (2014) writes an article discussing Vygotsky’s and Piaget’s theories.

- ▶ The Zagreb seminar: Dr Elizabeth McNess presents and discusses examples of international comparative studies in education, and delivers a PowerPoint presentation to participants.
- ii) One and the same project interpreter, Mr. Goran Đapić, from Sarajevo, has interpreted between English and Bosnian/Serbo-Croatian languages throughout the two innovation- and research projects (SØE 06/02, 2002; WB 04/06, 2006), occasionally joined by different colleagues in simultaneous interpretation. His permanent participation has contributed greatly to joint understanding, leading to common perception in all phases from preparation to comparative analysis. This has been crucial for the joint perception of meaningfulness, and thus credibility, of the entire research process.

*Collecting, analysing and compiling the joint international comparative report.* Are the research findings credible? Is the process of gathering, analysing and discussing plausible? Are the findings perceived as real and persuasive (Guba, 1981; Tracy, 2010)? The process of collecting the findings from the seven classroom studies into one common report consists of the following steps.

Step 1: Based on the joint main issue, the seven research teams describe their findings in accordance with the eight didactic-curricular main areas.

Step 2: The reported findings are collected in a joint text by the research coordinator.

Step 3: The first joint draft is sent to the research teams for review and revision.

Step 4: All revisions are gathered into draft number two and returned to the teams.

Step 5: Draft number two is discussed on a seminar in Split, Croatia.

Step 6: Draft number three is developed by the research coordinator in accordance with detailed analyses and revisions on the Split seminar as well as additional comments sent from research teams.

Step 7: Draft number three undergoes a thorough analysis in light of relevant theoretical and methodological texts, amongst them methodological literature that has been distributed to all research teams during the research process.

Step 8: Current draft, draft number four, has been peer or colleague reviewed and upgraded accordingly by the research coordinator.

The eight steps show the *close collaboration* between the participating research teams, which in itself contributes to credibility. So does also the longstanding or *prolonged engagement* in the compilation process towards creating the joint report. From the initial research plan and throughout the implementation and

compilation process, the participants have sought to *establish structural corroboration* through a) relating to the eight areas of the curricular relation approach as a common structure in categorisation and analysis of the studies, and b) the described repeated internal reviews of the content in the joint report.

Several other criteria for credibility are recognizable in the process as well as in the product, which is this completed research report. *Triangulation* or use of two or more methods in order to safeguard the findings has been applied in the majority of the seven studies, as documented (Johnsen, Ed, 2013; 2014; 2019).

In the process of developing the joint research report, Geertz' (1973) classical argument for using a) *thick descriptions* is met by diverse contextual descriptions, more specifically in a thorough chapter describing contextual similarities and differences between the seven studies. In addition the step-by-step development of the report creates an opportunity for b) *multivocality* encouraging different interpretations and viewpoints on the findings, thus contributing to more nuanced descriptions, followed by c) *member reflections* that are debated, specifically in the Split seminar (step 6). Through the eight steps, the joint analysis has been returned to each of the research teams a number of times for verification or revision, testing out the *correspondence* between the single studies and the joint report. Gill, Gill and Roulet (2018) argue that in this way an important criterion of credibility is met. Some *audit trial* has occurred along the road, as different aspects of the research project have been presented and discussed with the outstanding international scholars on the working seminars mentioned above. In the phases of developing the joint report, the project has been presented at international conferences and commented upon. However, systematic *external peer review* of the report has not yet been implemented. The multifaceted search for credibility discussed here, may be compared with internal validity in qualitative methodology, or the truth value, as pointed out above. All in all, this process of strengthening credibility contributes to a more *nuanced and plausible* account of the findings (Creswell, 2007; Creswell & Miller, 2000; Gall, Gall & Borg, 2007; Guba, 1981; Moon et.al, 2016; Northcote, 2012; Tracy, 2010).

How can one establish the degree to which the findings of an inquiry are a function solely of the subjects (respondents) and conditions of the inquiry and not of the biases, motivations, interests, perspectives and so on of the inquirer (Guba, 1981: 80)?

**Confirmability**, the next aspect of Guba's trustworthiness principle concerns whether or not reported findings provide answers to the research issues or are the result of research bias. A criterion for confirmability is therefore that it is

possible to replicate a similar research process and come to similar conclusions – to the extent that this can be realised in qualitative studies. Once again, it must be mentioned that confirmability is important on both levels in this joint research project; 1) the individual studies and 2) the analysis and compilation of the seven studies. However, it is important to repeat that all four main aspects of trustworthiness, including confirmability, are only discussed here for the analysis and compilation of the joint report, and not for the research process of (1): the seven individual studies. Several “control mechanisms” are constructed in order to account for possible biases. They are:

- a) Revealing underlying assumptions
  - b) Ensuring that interpretations and conclusions are grounded in evidence
  - c) Giving detailed methodological descriptions
  - d) Internal and external auditing
- a) *Revealing underlying assumptions*: To repeat, the issue of this joint research project is formulated with the question How do schools teach in accordance with pupils’ different levels of mastery and needs for support in the learning process (recourses, barriers and dilemmas)? However, as the title of the research project expresses, the question is posed within the context of developing educational inclusion. More specifically, it concerns how to construct a bridge between the principle of inclusion and practices related to individual pupils as partners in the joint class or group (Johnsen, 2014b; WB 04/06, 2006). It is a challenge to considering i) what “professional tools” are available in order to plan, practice, assess and revise in a teaching process based on pupils’ mastery level and abilities – and are therefore meaningful in their learning process, and furthermore ii) how to embed the teaching-learning process within the community of the class. The two aspects, which are presented in the introduction of this report, constitute an explicit foundation for the research question and can be examined throughout the research process. They are the underlying assumptions of the explorations in this research project.
- b) *Ensuring that interpretations and conclusions are grounded in evidence by focusing on the experiences and preferences of the informants*: The process of collecting, analysing and disseminating the joint findings described in the eight steps in the above discussion of credibility, leads to a joint presentation based on the interpretation of findings or evidence as they are perceived by all participating researchers in the joint research project.

- c) *Giving detailed methodological descriptions by securing their defensibility through examining the connection between research issue and -design:* The connection between the research issue, design and use of methods is described in the introductory chapter and followed up throughout the report. It is also discussed in the two published joint anthologies in articles presented by each individual research team as well as in joint articles (Johnsen, Ed, 2013; 2014).
- d) *Internal and external auditing:* Systematic internal auditing has taken place throughout the project and specifically during the eight-step process of analysis and compilation leading to this report. External auditing has taken place with presentations on conferences and seminars, but has not been systematic to the same degree as the internal auditing.

The four “control mechanisms” applied above indicate the research project’s confirmability and truthfulness in main features. Hence, there is the likelihood that the study’s issue and structure is suitable for further replications, which would contribute to extending knowledge about individual adaptation of the teaching, learning and developmental processes of the pupils in the community of the class, and thus development towards inclusion. The control mechanisms are accounted for in the literature on evidence in qualitative studies. Having the analysis and compilation of this joint text in focus, literature about assessing “the goodness” of qualitative textual analysis is useful in addition to the general literature on assessing qualitative research. It is therefore interesting to observe that also Gill, Gill and Roulet’s (2018) article *Constructing Trustworthy Historical Narratives: Criteria, Principles and Techniques* take as a point of departure Guba’s 1981 article containing the four main pillars of assessing qualitative research. Guba (1981) recommends applying “control mechanisms” in order to reveal biases. Other possible control mechanisms, such as those applied here, are discussed and developed in a number of related texts (Creswell & Miller, 2000; Gill, Gill & Roulet, 2018; Guba, 1981; Moon et al., 2016; Northcote, 2012).

**Dependability** concerns the stability and consistency of findings in qualitative or naturalistic studies. They are not suitable for direct replications of the kind that are expected of controlled quantitative studies, since contexts are crucial aspects of qualitative research. However, logical, consistent and similarly perceived processes and findings are hallmarks of trustworthiness (Gill, Gill & Roulet, 2018; Guba, 1981; Moon et al., 2016). Armstrong (2010), similarly, applies the concept of accuracy in her arguments for steps that should be taken

in order to verify findings and interpretations. Several measures are tried out and discussed to verify dependability in the research process and findings, such as a) triangulation, b) stepwise replications or so-called “dependability audit” c) coding-re-coding strategy; d) peer examination; and e) audit trial (Anney, 2015). How is the quality check of dependability conducted in this study? The steps described for collecting, analysing and disseminating the seven studies based on the common didactic-curricular main aspects illustrate how each step contributes to the process of reaching a common interpretation. The stepwise procedure consists of a series of internal audits, while external audits are not sufficiently systematic, as mentioned above.

**Transferability** – the fourth and last main criteria of trustworthiness described by Guba (1981) – concerns whether results of qualitative research can be transferred to other contexts and, hence, the truth-value of replicating a study. How can the question about transferability be judged? Geertz’ (1973) urge for thick descriptions is important here, as they are when it comes to judging the credibility of findings. The term “thick descriptions” means that outsiders describe findings in their context in order to avoid misinterpretation. In this way, the use of thick descriptions is a main approach to judging transferability. Taken at their extreme, thick descriptions involve elucidating all parts of the research process, from background data, phenomenon, research questions and choice of methods, situations, informants and data collection, to findings and compilation of the final report. Thus, thick descriptions based on contextual disclosures contribute to transferable truth-value and pave the way for replicating the study in other settings. The transferability of the seven studies of this joint research project is described in an extensive chapter on context as well as in articles describing the seven individual studies. All together, they present thick descriptions (Johnsen, Ed., 2013; 2014). Transferability is also closely connected to another main aspect of trustworthiness, namely confirmability, which is judged in accordance with the possibility of replicating a similar research process and come to similarly logical conclusions. Thus the main criteria of confirmability, mentioned above, also apply to the transferability of this study.

When a number of studies meet the criteria of transferability, they strengthen the possibility that the studies are true and trustworthy. Transferability has been compared to external validity, or the validity of applying the conclusions of a scientific study outside the context of that study. In other words, it concerns the extent to which the results can be generalised to and across other situations, people, stimuli, and times. However, this is not the same as the principle of gen-

eralisability in quantitative studies; while qualitative studies are not based on statistical calculations, their strength is that they can illuminate multiple aspects and details of joint phenomena, as this international comparative research project has done (Anney, 2014; Gill, Gill & Roulet, 2018; Guba, 1981; Johnsen, 2020c; Korstjens & Moser, 2018; Moon et al, 2016; Schwandt, 2007; Shenton, 2004).

***The authenticity perspective of methodological rigor.*** The dictionary definition of authenticity is the quality of being real or true (<https://dictionary.cambridge.org/dictionary/english/authenticity>). The authenticity perspective – introduced by Guba and Lincoln (1986) – draws attention to a dimension that is unique for ideographic, qualitative research and is characterized by its “... relativist ontology and an interactive, value-bounded epistemology” (p. 20). The authors claim that while conventional experimental methodologies and methods are based on value neutrality, naturalistic, qualitative methodology is based on value awareness; arguing as follows:

The axiom concerned with the nature of reality asserts that there is no single reality on which inquiry may converge, but rather there are multiple realities that are socially constructed, and that, when known more fully, tend to produce diverging inquiry. These multiple and constructed realities cannot be studied in pieces (as variables, for example), but only holistically, since the pieces are interrelated in such a way as to influence all other pieces. Moreover, the pieces are themselves sharply influenced by the nature of the immediate context (Lincoln & Guba, 1986: 17).

How, then, is it possible to account for the authentic value position of a qualitative inquiry? Lincoln and Guba (1986) admit that they are still searching to develop ways to assess authenticity. However, they introduce five criteria that their followers are in the process of developing further. These are a) fairness b) ontological authenticity c) educative authenticity d) catalytic authenticity, and e) tactical authenticity (Lincoln & Guba, 1986; Manning, 1997; Schwandt, 2007; Shannon & Hambacher, 2014). What do Lincoln and Guba and their followers mean by these concepts? How do they suggest that they function as criteria of authenticity? Moreover, accordingly, are features of these criteria found in the joint research project *Inclusive Practices*? In the following, these questions are discussed in relation to each of the criteria.

**Fairness** is explained in most detail of the five criteria. It is based on the following line of argument: i) that naturalistic, qualitative studies are value-based, ii) that they are constructed in accordance with differing value systems, and iii) that an important part of qualitative research is to account for its value

structures. Consequently, it is fair 1) that the researcher explicitly discusses the value framework of the inquiry and, as Manning (1997) argues, 2) that all participants have a voice in the inquiry. Manning (1997) also presents an extensive list of tools to assess fairness. Several of these also assess trustworthiness. This illustrates the close connection between the quality of trustworthiness and of authenticity. The two aspects are complementary. Are features of these aspects found in this joint research project?

*Fairness* related to the value framework of *Inclusive Practices* focus on 1a) theoretical considerations; 1b) international human rights principles; and 1c) underlying basic value considerations.

- 1a) The joint inquiry focuses on research on practice. The theoretical pillars are the “cultural-historical” approach to teaching, learning and development in context, a didactic-curricular perspective on inclusive practices and international comparative classroom studies with the implicit purpose of learning from other situations with the intention of borrowing ideas that might enable development of inclusive practices (Johnsen, 2013a).
- 1b) The research is based on several UN and UNESCO documents, whereof the Convention of the Rights of the Child (UN, 1991), the Salamanca Statement and Framework for Action on Special Needs Education (UNESCO, 1994) where educational inclusion is introduced, and the subsequent UN Convention on the Rights of Persons with Disabilities (2006).
- 1c) The main intention underlying the inquiry is to make a critical analysis of good examples of educational inclusion. The intention emanates from a realisation that there is little research on inclusive educational practices. Consequently, the research teams have selected what are presumed to be good cases.
- 2) The second main aspect of *fairness* concerns in what way all participants have a voice in the inquiry. The voice of the researchers in all the seven participating teams is heard throughout the eight-step process described and discussed under the heading of credibility. This process of collecting the findings from the seven classroom studies into one joint report consists of a hermeneutic interpretation process between the single teams’ reports and the joint report draft under continuous revisions. The process contributes to fairness through the close collaboration between all participants during the longstanding or prolonged engagement in the compilation, 2a) based on didactic-curricular structural corroboration, 2b) explicit focus on the

contexts of the seven studies that lead to thick descriptions, and 2c) internal peer debriefing and member reflections that encourage discussions of different interpretations and viewpoints concerning the findings.

**The four additional aspects; ontological-, educative-, catalytic- and tactical authenticity.** Does this joint research project add to the knowledge of the phenomenon in focus? Do researchers and participants as well as related professionals and politicians gain increased useful insight in the field? (Johnson & Rasulove, 2017; Schwandt, 2007; Shannon & Hambacher, 2014). By applying the four authenticities, Lincoln and Guba's (1986) attempt to shed light on nuances of increased understanding, applicability and societal relevance of qualitative studies. Ontology is the philosophical term for what is or exists. Thus, *ontological authenticity* occurs when the participants gain increased experience of the complexity of a phenomenon, such as in *Inclusive Practices* when they experience a) the significance of the interrelations between the seven didactic main areas in practicing individually adapted teaching for all pupils within the community of the class, and b) when they apprehend the important role that contextual factors play in classroom practices. This process may include a reconstruction of the participants' earlier experiences of the phenomenon of teaching practice.

When the participants also gain awareness that the process of the inquiry and cooperation has led to a reconstruction towards their increased understanding of different value systems, they have also acquired *educative authenticity*:

Constructivist research cannot only be an intellectual exercise, but must be worthwhile to, amongst others, the respondents who shared their knowledge, stakeholders, practitioners, and other researchers (Manning, 1997: 108-109).

**Catalytic and tactical authenticity** concern the innovative power of qualitative research. Lincoln and Guba (1986) argue that these aspects also characterize high quality. They point out that studies should facilitate and stimulate action, calling this "feedback validity". Assessment of catalytic authenticity focuses on examining if and how the inquiry process stimulates stakeholders' engagement. In *Inclusive Practices* the explicit intention is to study classroom practices. The inquiry is therefore constructed in order to obtain findings related to classroom activities that may be shared between researchers and close stakeholders.

Successful catalytic authentication may thus be characterised as a general indication of a research project that is constructed and shows findings that encourage further activities concerning classroom practices. This is a fair statement about *Inclusive Practices*. However, as mentioned, it only relates to the research teams'

cooperation in the joint analysis and dissemination of the joint research report. As with all the quality criteria, each research team may consider the trustworthiness and authenticity of their studies in relation to all their stakeholders.

Tactical authenticity focuses on all participants in a study, which in this research project relates to pupils, parents, teachers and special needs educators in addition to the research teams. The criterion of tactical authenticity is whether or not the findings lead to empowerment or impoverishment for different participants. Hence, it is important that researchers are aware of the differences in interpretation between themselves and other participants in collaborative research, or the emic-etic dimensions (Geertz, 1973). The differences may concern the research construction as well as findings. When it comes to this research project, the answers to the criterion of tactical authenticity depend on the two questions: a) has there been dialogue throughout the inquiry focusing on empowering the participants in each of the seven research teams? b) Are there plans for further presentations and discussions of the joint research report with participants as well as peer researchers? (Johnsen, 2019b; 2019c; Lincoln & Guba, 1986; Manning, 1997; Schwandt, 2007; Shannon & Hambacher, 2014; Simons, 2015).

## Trustworthiness, authenticity and evidence – a summary

Guba and Lincoln's (1986) four main criteria for trustworthiness and five aspects of authenticity draw attention to different and partly overlapping aspects of assessing evidence in qualitative studies. Trustworthiness relates to "the truth value" or validity of qualitative research, while authenticity concerns a dimension that is unique for ideographic, qualitative research, namely its "... relativist ontology and an interactive, value-bounded epistemology" (Guba & Lincoln, 1986: 20). The question if it is fair to characterise *Inclusive Practices* as 1) a valid holistic and nuanced presentation of the phenomena in focus of this research; and 2) with explicit value structures voiced by the participating research teams in the inquiries and joint research report, has been answered in some detail. In the following each aspect of the trustworthiness and authenticity check are briefly summarised, leading to a conclusion about the quality of the process and product of findings – the evidence.

**Trustworthiness** concerns what Denzin (2009) calls "warrantability", and is described as having adequate evidence so that conclusions are justified. In the

case of qualitative studies, this means that they need to be trustworthy, which is assessed using four main criteria:

Credibility concerns “the truth value” of a phenomenon, or if a study is perceived to have internal validity. The judgement of credibility is the most extended of the four aspects of trustworthiness, spanning planning, implementation and the process of compiling a research report. In the case of *Inclusive Practices*, the following parts of the research project are considered; a) preparation and planning phase, including pre-planned didactic-curricular main structure for investigation and analysis, theoretical foundation and joint flexible methodological approach; b) field study or implementation phase with its main focus on the seven studies, and including joint support for selected internationally renowned scholars at ambulating seminars, and important facilitation of the same interpreter all through the project; c) collecting, analysing, and compiling process. Main attention is given to the compilation process, consisting of eight steps of compiling and internal auditing in prolonged close collaboration towards establishing a common perception of evidence and structural corroboration. Thick descriptions, triangulation and multivocality in member reflections are used as instruments in the assessment process. This eight-step procedure is at the centre of assessment of several of the aspects of trustworthiness as and authenticity.

Confirmability assessment concerns whether reported findings are answers to the research issues or the result of research bias. Four so-called control mechanisms are applied: a) revealing underlying assumptions of the research; b) ensuring that interpretations and conclusions are based on evidence by focusing on experiences and preferences – in this case of research colleagues; c) giving detailed methodological descriptions by securing its defensibility through examining the connection between research issue and design; and d) systematic internal auditing that takes place throughout the project and specifically during the described eight steps process of compilation of the joint research project.

While confirmability is about assessing the research process, dependability concerns the stability and consistency of the findings in *Inclusive Practices*. There is general agreement on measures to be taken to verify dependability, such as triangulations, stepwise replications and so-called “dependability audits”. Once again, the eight steps process of collecting, analysing and compiling the seven studies based on the joint didactic-curricular main aspects illustrates how each step contributes in the process of reaching a common interpretation. A series of internal audits are applied to assess dependability.

Transferability concerns whether results of qualitative research can be transferred to other contexts, and hence the truth-value of replicating a study. This may be compared with external validity, or validity of applying conclusions of a scientific study outside the context of that study. It concerns whether the results of the qualitative research are “generalisable” – not like generalisability in quantitative studies – but because the strength of qualitative research such as this is the ability to illuminate multiple aspects and details of joint phenomena across other situations, people, stimuli, and times. Use of thick descriptions, such as the contextual descriptions and discussions in this report, contribute to disclosing differences, in this way paving the way to replicate the study in other settings.

When taken all together, the four aspects of trustworthiness examine the strength of evidence in the research process and findings of *Inclusive Practices*. Explicit assessment of all four aspects safeguards transparency and hence external validity, reliability and confirmability; to use Denzin’s (2009) terminology.

*The authenticity perspective* focuses on another dimension of methodological rigor, which displays the uniqueness of qualitative research, namely the explicit acceptance that 1) there is no single reality, but rather multiple socially constructed realities; 2) socially constructed realities or phenomena cannot be studied in single pieces, but in holistic interrelations; 3) all realities are context bound in time and space, and 4) they are value-bound. Consequently, it is a necessary core quality of qualitative research to account for the construction as well as the contextual- and value embeddedness of the phenomena that are studied. When it comes to fairness, which is the most detailed of the five authenticity aspects in *Inclusive Practices*, the focus on research on practice combined with international human rights, theoretical and methodological main positions are explicitly presented from the research planning and onwards. The seven research teams have flexibility concerning design and field studies within a joint basic structure serving as common ground for comparison. As an international research project, contextual descriptions and discussions are given considerable space. All aspects of Lincoln and Guba’s (1986) quest for fairness are explicitly presented, followed up through the research collaboration and strengthened through the eight-step process of compilation of the joint report; in this way the research teams have a voice in all parts of the inquiry. An overview of the seven studies constituting the research program also indicates that the researchers are true to the emic versions of the phenomena in focus and that the voices of informants and participants are considered.

According to Lincoln and Guba (1986), the four remaining aspects of authenticity have not been fully developed. Still, they may serve to focus attention on other possible aspects accompanying a study that have not gained attention in the trustworthiness aspects. Ontological authenticity concerns examining whether individuals or groups have gained experiences leading to changed views, increased knowledge – or to reconstruction of their view on a phenomenon, such as the phenomenon of educational inclusion. Educative authenticity concerns the participants' process of gaining awareness of this new understanding. Hence, ontological and educative authenticity may have an empowering effect on informants and other participants in a research project, including headmasters, teachers and special needs educators, parents and pupils in *Inclusive Practices*.

Catalytic and tactical authenticity – also called “feedback validity” – concerns the innovative power of qualitative research. The criterion for tactical authenticity is whether or not the findings lead to the empowerment or impoverishment of the different participants and groups. Assessment of catalytic authenticity focuses on examining if and how the inquiry process stimulates these same stakeholders' engagement. In *Inclusive Practices* there is an explicit intention to study classroom practices in different countries and contexts in order to learn from each other. Findings related to possibilities, dilemmas and barriers to individually adapted educations in the community of the inclusive class are therefore expected to lead to increased knowledge and awareness of the complexity of this phenomenon. This is in accordance with the intentions of the research project, as stated in the introduction: “The primary research question, or issue, directs the attention to the complexity of the phenomenon” (p. 1). This is expected to empower the participants in the schools to increase activities in favour of further developing their classroom practice.

In view of the above examination of trustworthiness and authenticity, the question remains if *Inclusive Practices* generate evidence-based knowledge about practices in class settings. Several techniques have been used to examine the quality and “truth value” of this qualitative research project – its strengths and limitations in generating evidence. They indicate that of the many quality checks, close collaboration, prolonged engagement along with systematic, repeated internal audit, multivocality and reflections above other findings constitute its strength, while the weakest link seems to be the limited and unsystematic external audits that represent a limitation to the quality check.

## The problem of comparing qualitative studies

How is it possible to compare different cases of a joint international qualitative classroom research project such as *Inclusive Practices*? The question of comparing qualitative studies has gained increasing attention in recent decades (Alexander, 1999; 2009; Broadfoot, 1999; Phillips, 1999; 2009; Ragin, 1987). Robin Alexander's (2000) major comparative work *Culture & Pedagogy – International Comparison in Primary Education*, hereafter shortened to *Culture and Pedagogy*, and subsequent articles are main sources of inspiration and knowledge acquisition for *Inclusive Practices*. Hence, in the following, Alexander's and other scholars' stances and arguments are highlighted, as special attention is given to how the question of trustworthiness is solved in *Culture and Pedagogy* and related texts, before the same question is turned to *Inclusive Practices*.

## The problem of naïve borrowing

The core of international comparative educational research is a belief that lending and borrowing policies and practices may contribute to educational development; in other words, countries and cultures can learn from each other. However, what characterises countries and cultures are complex networks of contextual differences and power relations. Hence, one of the major problems of trustworthiness and authenticity of comparative research concerns naïve borrowing. Thus, when comparing teaching practices, which is an activity on the societal micro level (Bronfenbrenner, 1979), the challenge is to avoid naïve borrowing, which means borrowing examples between cultures without taking into consideration their networks of differences, including policy, economy and other relevant factors. Supporting this warning, Phillips (2009) points out that transfer of ideas, practices or policies needs to meet certain conditions, such as the following:

- 'Borrowing' should be seen as a purposive phenomenon, where deliberate attempts are made to learn from the foreign example and to 'import' ideas in the shape of policy and practice into the 'home' system.
- A significant feature of the examination of foreign approaches to educational problems, whether or not they are 'borrowable', is that they help us to better understand problems 'at home'.
- In analysing ways in which borrowing takes place it is essential to tackle the difficult question of context and its appropriateness in terms of accommodating imported policies and practices (Phillips, 2009: 1073).

In a brief review of the history of comparative education from the beginning of the nineteenth century, Phillips (2009) describes how borrowing policies and practices have been both glorified and scandalised. He points out that contextualisation is a key factor in the process of borrowing. Different constructions have been developed such as differentiating analysis between stages (Phillips & Ochs, 2004) or between levels, like national, local and school level as a means to avoid naïve borrowing.

Recent years' rapid technological developments have brought countries and continents closer together into what is characterised as "the global community". Accordingly, educational comparisons have developed into global or regional evaluation programmes and coordination- and cooperation programmes, such as *The Bologna Process* of European Higher Education (<https://eua.eu/issues/10:bologna-process.html>), which is a coordination program, and *Programme for International Student Assessment* (<https://www.pisa.no/>), which is a large-scale international comparative evaluation project testing pupils' performance in central school subjects. The emerging large-scale evaluation programmes are implemented in accordance with high standard quantitative methodology, and the results are judged reliable and valid and statistically generalisable – and they are made available to lend countries and local communities their results in the form of "international standards" and "best practices". However, there are growing concerns about the cross-national lending and borrowing strategy within international comparative discourse regarding an array of problems, such as:

- a) the tendency to having a one-sided focus on educational politics
  - b) a one-sided belief in comparative research based on natural-scientific methodology and use of measurable "international standards"
  - c) a weak emphasis on the importance of contextual factors in comparative borrowing
  - d) the use of "international standards" and "best practices" as relevant measures for the process of teaching and learning at school
- a) The problem of one-sided attention on educational policies has a long tradition from earlier focus on comparing education on macro level, but has been strengthened and made more sophisticated with the cross-national lending and borrowing strategy. Pointing to the eighty articles of the *International Handbook of Comparative Education*, Broadfoot (2009) articulates an optimistic belief of a turn away from the one-sided focus:

... in place of the previously more typical focus on education systems and policies, national contexts and international surveys, we are increasingly seeing bold

attempts to reconfigure the epistemology of the field: to apply hitherto untapped theoretical perspectives; to conceive new units of analysis and to widen the range of building blocks that form its focus, such as micro comparative studies of classroom life (Broadfoot, 2009: 1249).

Unfortunately, more recent critics argue that the turn from one-sided comparative macro analyses indicated by Broadfoot does not seem to have reached relevant aspects of “classroom life” as yet, pointing to the introduction of “international standards” and “best practices” for the process of teaching and learning at school.

- b) Steiner-Khamsi (2014) and Sutoris (2018) characterise measurable “international standards for best practices” found in large quantitative international comparative studies as “thin descriptions”, using Geertz’ (1937) qualitative, ethnographic characteristic. They argue that classroom implementation is a complex phenomenon that is not fully grasped by using surveys alone. Rather, in-depth interviews and observations are necessary methods.
- c) In accordance with the above arguments, “best practices” of large-scale global and regional programmes have a weak emphasis on contextual factors. Offering them directly indicates to lend naïve or thin descriptions of practices. The other aspect of application – the borrowing of results from such comparative studies, needs to be “translated” from the eventual large-scale study and adapted in accordance with the complex context of the receiving local community. This calls for qualitative studies in order to explore the suitability of the introduced practices to local culture (Alexander, 2012; 2015; 2016; Steiner-Khamsi, 2014; Sutoris, 2018).
- d) Do the conceptual landscape developed in the systems of “international standards” and “best practices” meet the everyday practice of the teaching-learning process? Alexander (2015) argues that they do not. Referring to his international, comparative research (2000) and later works, he asks: “Why no pedagogy ...” (Alexander, 2015:254)? His answer contains a reflected proposal for a conceptual framework for the teaching-learning process that may indicate empirical possibilities for international comparative classroom studies. They consist of two main pillars:

*Teaching as an act:* Planned acts – interactive actions – judgements concerning organisational, curricular, epistemic and temporal elements

*Teaching as ideas:* Values, beliefs, theories, evidence, policies and justifications on classroom – system/political – cultural/societal levels

His concluding argument is that teaching as an act identifies the cross-cultural invariants of teaching, while teaching as ideas addresses the cultural aspects of meaning. In this way, his conceptual framework may contribute to adapting a borrowed phenomenon to a local community and school by placing it in the local conceptual landscape – as a local “thick description”. Alexander’s (2015) proposal concerning developing a practice-near and educational-professional terminology moves in the same direction as in his earlier texts (2000; 2004; 2009). *Inclusive Practices* – this international comparative classroom research project – follows a similar logical path. As accounted for, it is based on a pedagogical construction consisting of seven interrelated didactic-curricular main concepts as a joint frame for the research process and product through field studies, compilation and conclusive discussions. It is a practice-near study of inner activities at school consisting of seven classroom studies, surrounded and embraced by discussions of contextual similarities and differences. Similar to Alexander’s construction, *Inclusive Practices*: a) applies a set of pedagogical concepts that are generally understood and accepted within international educational research; and b) accounts for a number of relevant contextual differences and similarities. Thus, findings presented and discussed in the report are situated within common pedagogical conceptual frames and contextual diversity, as pedagogical and “local-international” thick descriptions.

As this section indicates, naïve borrowing is a recurring problem within international comparative studies. It is a problem of research credibility, regardless of whether or not it applies to quantitative or qualitative studies, and there is therefore good reason to strive for preventing and avoiding the problem. The construction, research process, compilation and report on *Inclusive Practices* have focused the attention on avoiding this. Hence, placing findings in their pedagogical and cultural context as thick descriptions is one of a number of research methodical details. However, it is an important detail for the truth-value or credibility of a qualitative international comparative research project such as this one.

## 14 Conclusion

### Issue and essence in the international comparative classroom studies

This is an international comparative study comprised of research teams from the seven universities in Belgrade, Ljubljana, Sarajevo, Skopje, Tuzla, Zagreb

and Oslo. Part 3 is a research report containing a joint comprehensive presentation of findings that contribute to answering the primary research question or issue of how school manages to meet the educational needs of every pupil within the diversity of the class (recourses, barriers and dilemmas). The issue directly addresses the complexity that is characteristic of teaching-learning-developmental processes (Vygotsky, 1978; 1987; Wertsch & Tulviste, 1992). The presentation of findings are categorised in accordance with seven didactic-curricular main aspects; knowledge about the pupil – assessment – educational intentions – educational content – educational methods and organisation – communication – care (Johnsen, 2014b). The study of internal classroom activities promoting educational inclusion, as well as dilemmas and challenges, is based on three pedagogical pillars; a) the abovementioned didactic-curricular approach (Johnsen, 2013a); b) Vygotsky's and the culture-historical school's basic theories and construction of teaching-learning-developmental processes; and c) the resource-based interaction approach on communication and mediation (Johnsen, 2014b; Rye, 2001; 2005). These are pedagogical concepts that are generally understood and accepted within international educational research. The findings on micro level are embraced with a chapter illustrating contextual differences and similarities concerning a number of relevant aspects on national macro level in the participating countries. All in all, the three pedagogical pillars, structure and content of the findings presented and discussed in the report, are situated within common pedagogical conceptual frames and contextual diversity as pedagogical and "local-international" thick descriptions. Accordingly, the report, with its practice-based and educational-professional terminology, moves in the same direction as Alexander's (2000; 2004; 2009; 2015) line of arguments concerning structuring international comparative classroom studies, whether or not they make use of quantitative or qualitative methodology, such as this.

## **Educational practices contributing to inclusion**

The overall findings show that classroom teachers are the focal point of all seven studies. They are described as being main actors with knowledge about individual pupils in the majority of the studies. They are also responsible for practicing meaningful teaching and learning processes adapted to the diversity of pupils' educational needs in the community of the class – in several of these cases having the professional support of special needs educators. Attention is paid to

the many similar findings of practices leading towards educational inclusion within all the seven didactic-curricular aspects on micro level. Specific attention is paid to the participating teams' strong emphasis on the two aspects communication and care. A cautious conclusion describing the joint research project's results is that some first steps have been taken in what can be a turn towards inclusive practices with the help of special needs education professionals and researchers. Still, all the teams are also aware of negative mentalities towards opening up ordinary schools to all pupils, and they discuss reasons behind the gap between official principles of inclusion and actual practice. A discouraging finding is that similar challenges and negative attitudes may still be found in a Norwegian context despite the fact that almost 50 years have passed since the country turned towards embracing the school for all, and inclusion was enshrined in the Norwegian *Education Act*.

## Implications for professional practice, higher education and research

The purpose of qualitative studies, specifically case studies, is to reveal the complexity a phenomenon (Stake, 1995; 2006). This joint research project is about the complexity of planning and practicing individually adapted teaching and learning processes in the community of the class, thereby developing inclusive practices. The findings demonstrate this complexity in a systematic way through categorisation of findings in accordance with and across the seven didactic-curricular main aspects on micro level. The findings invite to replication; both professionally-practically for teachers and special educators as well as in further research.

The findings also point to dilemmas and challenges that lead to a number of questions concerning future developments in all participating countries:

- Does teacher education contain the necessary research-based and practical knowledge and skills about how to practice inclusion, for example by applying all aspects of the Curriculum Relation Approach (CRA) or other relevant approaches?
- Does education of special needs educators contain the necessary research-based and practical knowledge and skills within special needs didactics, construction of individual curricula and development of inclusive practices?

- Do special needs education and teacher education contain the necessary research-based and practical knowledge and skills with respect to cooperation between the two professions?
- Does every school have a special educator who has an overview and responsibility for all pupils with special educational needs and for inclusion of all pupils in the community of the class and school?
- Has every school employed special needs teachers to perform special needs education teaching tasks?
- Have schools managed to change from a regular to an inclusive organisation?

Five of the seven studies conduct systematic innovation concerning educating pupils with special needs in regular schools. They have attracted attention, interest and enthusiasm, especially in disability NGOs. Moreover, they have aroused hope in teachers, parents and pupils with special needs. Researchers and research institutions have used considerable resources on the projects. In light of this, the question about sustainability is important: a) Are those who are financially responsible in their communities ready to take over and proceed in accordance with the results of successful action research- and similar studies? b) Are the schools willing to employ special needs educators in place of the ones participating on behalf of the studies?

This research is comprehensive in its systematic study of main aspects and their interrelations down to concrete details. It focuses on the academic side of meaningful teaching, learning and development as well as on its psychosocial side through relational communication and care. Human rights and socioeconomic conditions and priorities on macro level have also received attention. As an international comparative research project, it offers extended insight into diversity and similarities within the different European countries. The many similarities in educational and special needs educational attitudes and practices in the seven studies attract special attention – not the least when it comes to developing new practices towards educational inclusion. Does this indicate that there is a common international basic understanding of schooling and the importance of creating meaningful processes of teaching, learning and development, as also indicated by Alexander in his international comparative research (2000)? Perhaps, yet this international comparative research is only the first of its kind. More studies are needed in order to reveal deeper and more comprehensive understanding of the complexity of inclusive teaching, learning and developmental processes within the community of the class.

## The complicated inclusive practice

This international comparative research project has been discussed in view of the inclusive practice studies and debates found mainly in chapter 12. Several texts reflect not only a certain pessimism regarding preliminary implementation attempts – and partly the lack thereof – but also a normative willingness to develop and try out new inclusive practices. Thus, Slee and Allan (2001) argue that educational inclusion cannot function as an extension of ordinary classroom pedagogy. A new pedagogy must emerge from the revision of ordinary and special pedagogical knowledge through alternative research approaches. Cole (2005) argues that a complete reversal of "taken-for-granted truths" is needed to develop inclusive practice at school. She points out that educators need to keep "all roads open" and have a professional humility that makes the child's needs central. In Naraian's (2011) case study, the intentions are to create a practice community of equality and care; a diverse student community with mutual involvement and common activities and repertoire in line with cultural-historical tradition and relational pedagogy. Cole's (2005: 341) conclusion of her practice study illustrates the core of the dilemma between the principle and practice of inclusion: "Inclusion was a multifaceted and difficult process, which, although it can be defined in political rhetoric, was much more difficult to define in reality". Inclusive practice is a complex and nuanced phenomenon challenging "taken-for-granted" educational traditions and structures. There is a dire need for more professional school innovation and studies – replicating already reported studies like these or starting from new perspectives.

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