Discourses, Decisions, Designs:

An International Comparative Analysis of "Special" Educational Policy Making in New South Wales, Scotland, Finland and Malaysia

BY

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ABSTRACT

This research draws on a nested case-study approach to investigate the influence of neo-liberal and inclusive discourses in education policy decision-making and the design of student support structures in New South Wales (Australia), Scotland, Finland and Malaysia. Findings reveal that policies inspired by neo-liberal market theory work in opposition to the goals of inclusive education but both forces are present in varying degrees in the four jurisdictions. Largely as a result of federal direction, the New South Wales education system is the most marketised with increasing school choice, assessment benchmarking and "like-school" comparison of academic performance. Malaysia is following a similar path with a highly selective centralised education system, limited resources for inclusion and an increase in the adoption of neo-liberal steering mechanisms. More inclusive discourses can be identified from Scottish and Finnish data through active endorsement of the mainstreaming policy, equal social and academic participation for students with a disability and prompt individualised support. Telltale signs of neo-liberal policy borrowing are beginning to emerge but with little material effect to date. It is argued that an inclusive approach is conducive to the achievement of both excellence and equity in students' learning outcomes, whereas countries that have pursued market-driven models involving competition for places in selective institutions tend to have poorer educational outcomes and wider levels of inequality.

THESIS STATEMENT

I, Pei Wen Chong, hereby state that this dissertation is completed to fulfil the requirements of the joint doctoral program in education in Macquarie University and University of Edinburgh. This work has not been submitted for a higher degree to any other university or institution. Also, it is entirely my own work and that every reference to other materials has been acknowledged. Ethical approval for interviews with policy makers in New South Wales has been obtained in conjunction with my principal supervisor's current ARC Discovery project (Graham, L.J., DP1093020; Human Research Ethics Committee Approval No. 5201000237(R); New South Wales Department of Education and Communities state education research approvals process (SERAP) approval No. 2010026).

Final approval to conduct interviews with overseas participants in Malaysia, Scotland and Finland have also been granted by the Macquarie University Ethics Secretariat with the reference number 5201001137(D)[1] prior to data collection. The study also obtained ethical approval from the Moray House School of Education Ethics Sub-Committee of the University of Edinburgh as well as a research pass from the Economic Planning Unit of the Malaysian Prime Minister's Department to conduct research in Scotland and Malaysia. No research approval is required in Finland as my research does not contain any features specified in the official document of National Advisory Board on Research Ethics nor involving scientific methods for data collection. Other informal emails have also been exchanged with the coordinating secretaries of various departments in Malaysia, Scotland and Finland to gain access to potential interviewees.

Signature of Candidate

Date: 15 JANUARY 2013

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Preamble: Structure of the Thesis

The thesis consists of eight chapters which explore the effects of neo-liberal and inclusive discourses in education policymaking and student support designs in New South Wales, Scotland, Finland and Malaysia. The first chapter aims to provide an overview of the research problem and why it is a matter of concern. It introduces the increasing complexities of policymaking in a globalised world where various ideological agendas with contrasting interests and effects converge. In particular, the intersection of inclusion and neo-liberalism in educational development creates conflicting challenges in providing a quality education equally for all students. The case and reasons for conducting a comparative analysis are then established, followed by a clear definition of the research purpose and questions. Limitations and assumptions are then covered.

The second chapter provides a literature review covering the concepts that underpin the inclusion and neo-liberal policy debates along with their historical developments. The objective is to give the necessary theoretical background needed to understand of the rest of the thesis. In the third methodological chapter, the nested case study approach is outlined to shed light on the three levels of inquiry embedded within the "Russian doll" conceptual framework. The distinct functions of the macro, meso and micro levels are discussed as well as the sources used to obtain the relevant data. The chapter then examines processes in the selection of policy documents and relevant literature, applications for ethical approval and the selection of participants. The interview schedule is then presented in chronological order, followed by the main interview themes which are employed in the study. Before elaborating on the research gaps relevant to the four contexts under study, methods of data analysis for policy texts and interview data are explored.

The next four chapters are the four case studies developed based on the "Russian doll" approach detailed in chapter three. They follow a similar format from macro, meso to micro level of analysis as illustrated in Table 3.1. The macro level intends to set the national contexts which bear a strong influence on education policy development. Some historical notes, country data and demography are first introduced (population, economic performance, colonialism, socio-cultural tradition, literacy rate and the schooling structure) to establish background information for readers. The following section on the political context and international scene attempts to shed

light on welfare trends and influential political movements at international/ national/ state/ local levels impacting past and current policy structures. The influence of international student assessments as benchmarking tools is also explored at this level.

With adequate contextual information, the chapter proceeds with the meso level of analysis which looks into the education policy frameworks spanning a 15-year timeline in the four regions and links discourse with textual rhetoric in context. The manner by which each jurisdiction portrays the purpose of education is analysed and discussed. Specifically, important concepts underlying "special" education which carry different meanings in the four contexts are examined. Targeted areas of governments' funding allocations and student enrolment trends are analysed along with legislative developments. The goal is to provide some explanations for policy, enrolment or funding changes, whether they are driven by inclusive intent or neo-liberal ideas. A few features characterising neo-liberal ideology such as competitive assessments, educational marketisation, accountability mechanisms and outcome-based management are then dissected to consider the extent of its influence more explicitly. Finally, the micro level focuses on the analysis of interview discourses to gain insight into policymakers' perceptions on the research topic while determining emerging themes. This macro-meso-micro frame analysis is able to highlight the strong influence between discourses, decisions and designs.

Based on the findings of the preceding chapters, comparative analysis is conducted and developed into the eighth chapter. The chapter follows the structure laid out in the title of the thesis — "Discourses, Decisions, Designs". In the first section, the effects of powerful organisations such as the OECD and the influence of the Program for International Student Assessment (PISA) on education policymaking are investigated and differential impacts or reactions are contrasted. The second section engages with the relative priorities of each of the four education systems as influenced by inclusion and neo-liberal ideologies, accompanied with the discussion of legislative discourses. The distinct student support designs are then studied followed by the final conclusion.

Chapter One

Competing Goals, Competing Discourses:
The Influence on Student Support Services

1.1 Introduction

Education leaders around the world are responsible for developing policies and practices aimed at improving the performance of educational systems and the learning outcomes of their students. These policymakers also have a role in formulating education programs and budgets against a set of short, medium and long-term objectives. This task has rapidly increased in complexity over the last two decades as the communication and exchange of services, ideas and goods across nation states have been augmented by rapid improvements in technology (Marginson, 1999). These borderless activities have dramatically reduced both the physical and temporal space between nation states; which in turn has radically affected the development of education policy and its translation into practice (Olssen, 2004). Educational agendas are increasingly developed on a transnational basis where educational jurisdictions strive to keep up with new global trends.

Education policies are heavily influenced by economic, social and cultural development, as well as the educational requirements of the specific regions and their economic competitiveness in the global arena (UNESCO Secretariat, 1963; Lemasters & Nir, 2007). Through such regional and global influence, some ideologies and certain "best" practices have diffused across countries. Different nation states respond according to their own perspectives based on local contexts and the global ideologies might influence policymakers while designing education policies and practices (Fairclough, 2005). Van Dijk (2001) defines ideologies as:

> … a special form of social cognition or 'ideas' shared by social groups.
> Ideologies thus form the basis of the social representations and practices
> of group members, including their discourse. Ideologies have effects on
> discourse forms and meanings, and how discursive structures may in turn
> contribute to the formation and transformation of ideologies. (p. 12)

When those ideologies gain popularity and become dominant their linguistic representations surface in the form of discourses, which constitute "social subjects and their associated identities, their relations, and the field in which they exist" (Purvis & Hunt, 1993, p. 474). Discourses have the power to shape political and structural reforms across nations and influence their policy constructions which are then reproduced in system design. The design of educational systems and choice of governance strategies are products of deliberate policy decisions under the influence of supra-national discourses. The strong link between *discourses, decisions and designs* inspires this study to be undertaken to further explore such connections in the sphere of educational governance. There are two major ideologies along with their representative discourses which have been affecting education policy-making and the strategies used to raise student learning outcomes internationally since the advent of globalisation, these are described in this thesis as "inclusion" and "neo-liberalism". As these discourses may "evoke trajectories of change that are as unpredictable as they are inexhaustible" (Naraian, 2013, p. 360), the study aims to examine the interaction between global discourses, policy formulation and student support construction in the four chosen contexts.

1.2 Education Policymaking – The Influence of Inclusion and Neo-liberalism

The inclusion movement started to gain momentum in 1994 when the Salamanca Statement and the Framework for Action were announced in the World Conference on Special Needs Education. The conference was led by the United Nations Educational, Scientific and Cultural Organization (UNESCO) which also has significant interest in - and influence upon - education globally. UNESCO is devoted to achieving quality education with universal access to learning and equity, developing comprehensive basic education and enhancing inclusive learning environments (Ainscow, 1995). UNESCO calls on all governments to promote equal participation, opportunities and optimal learning environments for all children irrespective of their gender, abilities, origin, impairment, family background and location. The Salamanca Statement advocates an inclusive orientation so that "children with disabilities should attend their neighbourhood school that is the school that would be attended if the child did not have the disability" (UNESCO, 1994, Article 18, paragraph 2).

The inclusion movement argues for the reconceptualisation of schooling in order to break down the concept of the "special" and "regular" school or classroom so that the provision of effective individualised support meets the diverse needs of all learners (Carrington, 1999; Graham, 2006; Slee, 2011). Some children with additional support needs have been denied the right to mingle with their peers in local mainstream schools and learn vital social skills, which has affected their quality of life and social participation in the wider society (Hall, 1997). Although separate placements for these children have decreased over time, some countries or schools still practice exclusionary measures without considering the potential benefits that students with special needs may gain from mainstream schooling. Special education can sometimes be misused for administrative and teaching convenience and contributes to the social devaluation of these children with heavy implications beyond their school life, which is why some scholars argue that children should be included in the mainstream education settings as far as it is possible.

Inclusive education philosophy views student diversity as the norm (Graham, 2006). The distinction between special and inclusive education is that the latter focuses on the transformation of schools and pedagogy, instead of the diagnosis and intervention on particular students (Thomas & Loxley, 2007). The aim of inclusive schooling is to provide high-quality education for all students in the same learning environment irrespective of individual differences through the provision of meaningful differentiated curriculum, effective teaching, and necessary support (Ferguson, 1995). Conversely, special education conceptualises difficulties in learning as arising from deficits in the neurological or psychological make-up of a child, which is analogous to an illness or medical condition (Skidmore, 2004).

Farrell (1997) summarises some of the arguments in support of segregated special schools based on this model and suggests that it is unrealistic to expect some children with additional support requirements to learn from the same curriculum in aiming for similar standards and goals as other children. He believes that the degree of individual planning required to meet some "special needs" is only possible in special schools with teachers who are highly motivated and who possess pedagogical skills acquired through additional specialised training. Conversely, Wolfe and Hall (2003) provide solid examples of successful inclusion of children with severe disabilities in general education classrooms based on "the Cascade of Integration

Options" (p. 57) and multi-professional teamwork which enable healthy social integration and meaningful content area instruction (Anning, Cottrell, Frost, Green & Robinson, 2006).

Despite the documented successes of inclusion, there are wider educational issues arising from schools' incapacities to deal with increasing diversity in student composition that have prompted practices that work against inclusion. Statistics have shown a global dilemma, across the US, UK, Canada, New Zealand, Germany, Japan and many more, that an increasing number of students from minority ethnic groups, low socio-economic backgrounds and migrant families are over-represented in special education when language and cultural differences are translated as disabilities (Borgemenke, 2001; Gabel, Curcic, Powell, Khader & Albee, 2009). Immigrant students are also disproportionally represented in the categories of mental retardation (intellectual disability), emotional or behavioural disorders, and learning disabilities (Coutinho & Oswald, 2000). Gender imbalance in special education is also a widely contested issue as the over-identification of males for special provision far exceeds those received by females, especially in the category of behavioural disorders (OECD, 2005; Yeargin-Allsopp et al., 2007). Based on these trends, the traditional role of special schools to offer special expertise exclusively for students with a high level of special needs has changed to also accommodate those who cannot or will not conform to the expected academic requirements of general classrooms (Graham, 2007b). Such analyses have repeatedly shown that special education can also function as a tool of exclusion from the dominant society (Oliver, 1990; Tomlinson, 1982; Graham & Jahnukainen, 2011).

When students from special schools were transferred into mainstream schools through the integration approach, the lack of organisational, curriculum and instructional modifications developed to accommodate the newly received students with special needs resulted in major dissatisfaction among students and parents (Northway, 1997). However, "integrating people into deficient educational organisations will not suffice" (Carrington, 1999, p. 259), if schools are not equipped with a new set of coping strategies to ensure the needs of those students are properly met. Their learning experiences following integrated placements would not be more positive than before without the necessary integrative efforts. Integration is essentially very different from inclusion although this distinction has become blurred over time

with the lack of awareness and understanding (see chapter 2). In fact, the "inclusion movement" emerged in response to difficulties with the practice of integration following de-institutionalisation in the 1970s, when integration policy began to receive criticism for neglecting the social and political aspects of disablement.

> The realisation that exclusion can be multi-faceted and not necessarily addressed by mere changes in placement highlighted the importance of challenging existing social norms in order to forge the kind of social, economic and cultural contexts that would be more accepting and open to structural change. In other words, inclusion was intended to bring about the political change that integration could not. (Graham & Jahnukainen, 2011, p. 263)

Indicators of an equitable and inclusive education system include: the availability of educational support structures, pedagogical interventions for individualised education, high standards in all neighbourhood schools, inclusive learning for diverse learners, less use of ranking and academic selection, and broader learning outcomes for all students (Perry, 2009). The proportion of GDP spent on education and other public services is a further indicator of a country's commitment to promoting equity (Kochendörfer-Lucius & Pleskovic, 2006; Mandl, Dierx & Ilzkovitz, 2008). Perry (2009) further elaborates that a government that prioritises equality in a society should impart core social values, knowledge and skills to all children regardless of race, gender and/ or socio-economic status to ensure each child has equal opportunity to succeed. Additional support needs to be given to children from disadvantaged backgrounds or with certain impairments to ensure equitable access to learning opportunities.

Regardless of considerable support from a large number of parents, disability activists and academics, the vision of inclusive education has been stymied by logistical, financial and political barriers, all of which have affected the development of inclusive schools (Ferguson, 1995). For example, a study conducted by Rogers (2007) revealed that some parents have reservations about the effectiveness of inclusive settings as the actual "inclusion" is not necessarily occurring in practice when the highly structured testing and examination culture in schools limits the teacher's ability to account for learning differences and provide individualised

education. The dichotomy between inclusive education and testing culture for the purpose of student selection is becoming progressively more evident when politicians harness education for national economic success (Hanushek, Jamison & Woessmann, 2008).

There can be a significant material difference between the rhetoric in policy documents and the reality in schools (Ng, 2008) and policy-making has never been straightforward (Beech, 2009). More often than not, policies are formed through a complicated process to strike a balance between contesting discourses and to reach an agreement between conflicting opinions from numerous stakeholders (Vidovich, 2000). Agreement can be forged through various methods to achieve certain individual or group interests. It is common to observe competing discourses within policy documents, as well as varied implementation effects (Riddell, Adler, Mordaunt & Farmakopoulou, 2000). For instance, the allocation of funding to students with special needs using the formula of funding categories and eligibility requirements "can both include and exclude children" (Kay, Tisdall & Riddell, 2006, p. 363). There is a dilemma between the identification of students for support provision to facilitate their academic participation and also the possible resulting segregative placements for targeted specialised instruction. The rhetoric of inclusive education has also been widely adopted by policymakers despite simultaneous expansion in special education categories and separate provisions, which segregate more than include children (Anastasiou & Kauffman, 2009).

These trends imply that inclusive education cannot gain traction because of the attractions that special education holds for general education policy (Graham & Jahnukainen, 2011). Special education has been misused as an attractive solution to the inability of general education in dealing with the learning problems of at-risk students (Graham & Jahnukainen, 2011). For instance, it provides relief to the classroom disruption caused by children with social, emotional or behavioural difficulties by transferring them into special schools and classes: a trend increasing in New South Wales, Australia, Alberta and Canada, as evidenced by the growth in this category of diagnosis (Alberta Education 2008; Graham & Sweller, 2011). In countries where standardised testing is widely employed to measure school accountability, schools face mounting pressure to set academic success as the foremost priority. Low-performing students who fail to conform due to various socio-

emotional, physical or intellectual difficulties are segregated to save schools from the additional distraction, stress and required human resource (Graham & Jahnukainen, 2011). This "productive" mode of school governance in support of special education is more compatible with neo-liberal approaches to organisational management than the philosophy of inclusive schooling endorsed by UNESCO. Thus, education provision can be increasingly fragmented as the academic pressure imposed on students and the accountability for results experienced by schools increase along with the promotion of competition within and between schools based on neo-liberal outcome-based governance. Harvey (2005) defines neo-liberalism as:

> …a theory of political economic practices that proposes that human well-being can best be advanced by liberating individual entrepreneurial freedom and skills within an institutional framework characterized by strong private property rights, free markets, and free trade. The role of the state is to create and preserve an institutional framework appropriate for such practices.... Furthermore, if markets do not exist (in areas such as land, water, education, health care, social security, or environmental pollution) then they must be created, by state action if necessary. (p. 2)

This form of economic liberalism has emerged in the public service since at least the 1980s, with its discourses penetrating government education policies and governance ever since (Davies, 1996; Simola, Rinne & Kivirauma, 2002). It is a school of thought that originates from the financial sector which heavily subscribes to the "logic of the pure market" (Tabb, 2002, p. 29) and perceives that the welfare state is a costly obstacle to uninhibited economic growth (Davies & Bansel, 2007). As Hackworth (2005) indicates, "the market is seen as the most efficient way and normatively ideal way to allocate goods and solve social problems" (p. 30).

In this new system of public governance, competition is viewed as the best tool to increase quality and efficiency by means of educational marketisation and reduced state intervention that comes with heightened control through benchmark setting, performance accountability, appraisals and measurable outcomes for students and schools (Olssen, 2004). The neo-liberal model of education governance is concerned with expanding the growth of private sectors, decentralised management

and accountability in the educational sphere to improve academic achievement (Beckmann, 2009; Harvey, 2005; Hursh, 2005). In addition, parental choice in an educational "marketplace" where schools compete for student enrolment is presumed to improve the quality of schools (Anastasiou, 2009).

The neo-liberal wave that has swept across education policymaking carries the potential to produce better educational outcomes and results through the style of corporate managerialism by "managing for results" (Weller & Lewis, 1989, p. 1) and "doing more with less" (Yeatman, 1987, p. 341). This also corresponds with the spirit of the Organisation for Economic Co-operation and Development (OECD, 1995) to create a "performance-oriented and less centralised public sector" (p. 8). The aim of this agenda is to improve productivity targets by establishing competition in the public sector to drive better academic results in schools (Taylor, Rizvi, Lingard & Henry, 1997). Evidently, the spread of neo-liberal ideas into the educational sphere has introduced major changes in the conception of education management and the discursive practices in policymaking.

Hursh (2005) and Ball (1998) describe some of the characteristic elements of neo-liberal influence on educational policies and practices such as the expansion of standardised testing, accountability measures, institutional competition, school choice, managerialism, performative steering and curricula fundamentalism (compliance with central targets, strict guidelines and standards). Proponents of large scale standardised assessments argue that competitive tests "will increase educational opportunity and ensure greater assessment objectivity than teachers provide" (Hursh, 2005, p. 494). However, Hursh (2007) later added that policymakers need to be wary about the rapid adoption of neo-liberal approaches to replace the former social democratic approaches as no clear evidence has shown that academic outcomes have improved with neo-liberal education governance. Others have highlighted the effect of economic globalization and market forces, which build pressure towards common policy agendas (Ball, 1998a). Education as a "public and social good" and education as a "strategic commodity", which is inspired by neo-liberal ideas, are two political agendas that are being played out in various countries.

Neo-liberalism has induced globalised effects in education governance that promotes standard-setting measures so that schools and teachers are held accountable

for their students' performance. Government spending on education has been restructured towards economic efficiency in order to maximise schooling outcomes with minimal resources. The pure market logic founded on parental rights in choosing schools has also affected some governments to establish private institutions to cater for the varied needs of education "consumers" (Kilmister, 2004). Tabb (2002) additionally points out that outcome-based steering mechanisms in education are another neo-liberal management ideas which empowers schools with greater autonomy, yet accompanied with increased inspection and benchmarks to ensure schools are producing high achievers who would become the future workforce of the country. These strategies are geared at improving schooling efficiency and productivity but the extent of its influence in unique jurisdictions differs and the degree of its success has also been widely debated.

With the growing influence of neo-liberalism, the traditional principle of equity is threatened by the new competitive schooling environment (Jonathan, 1997). Accountability and distant-steering mechanisms borne out of neo-liberal ideas have directly and indirectly moulded educational institutions into commercial products (Marginson, 1999). Schools and educators face an immense amount of pressure to generate academic excellence from students in high-stakes testing, which is then compared in league tables nationally or internationally. One of the possible side effects is the occurrence of "educational triage" (Gillborn & Youdell, 2000), where students are sorted in educational institutions based on their ability to pass high-stakes assessment, while "rescueable" students are drilled intensively to boost passing rates and therefore reach higher standings in school league tables (Booher-Jennings, 2005). Some schools strive to climb up the league tables in order to survive tough academic competition, and consequentially resources become earmarked for students with "potential," while other less promising students with disabilities or those from disadvantaged backgrounds are segregated or marginalised (Gillborn & Youdell, 2000). Caught between the disparate agendas of neo-liberalism and inclusion, policymakers have to decide how to strike a balance between equity and competition. As neo-liberalism is a pervasive conceptual model, different value systems lead to a range of approaches which translate into different policy effects in various educational jurisdictions (Luke, Graham, Sanderson, Voncina & Weir, 2006).

Globalisation has created a certain degree of convergence where policies in different countries have become progressively similar over time. On closer examination however, policies from different states still maintain a certain distinction, aim and rationale as a result of their distinct cultural and contextual backgrounds, as well as selective local adaptation. As Dale (1999) puts it, "globalization is not a homogeneous process, nor are its effects homogeneous" (p. 3). Some countries retain commitment to their own principles and resist the temptation of widespread policy ideas. In other words, the global systems which bind nation states closer together raise concerns that prompt the adoption of strategies, such as central monitoring or steering from a distance, devolution of power, reduced financial allocation from the government and performative quality assurance. However, these strategies are informed by market economics and can work against the goal of inclusion by creating competition not only between education systems but between school districts, as well as individual schools and students. This being said, different countries are affected and have responded in different ways and this is in large part due to their distinct historical, cultural and contextual backgrounds.

A monolithic conception of what constitutes neo-liberal education policies is, therefore, inaccurate as policies manifest in different degrees, forms and practices at diverse locations (Olssen, Codd & O'Neill, 2004). For instance, the neoliberal accountability paradigm stresses control that builds a culture of distrust and restricts the moral agency of professional teachers with a strong need for output monitoring and target setting. Professional accountability conversely empowers employees to take charge of responsibilities and exercise competent judgments (Olssen et al., 2004). The discussion is thus devoted to identifying the relations between discourse and policymaking in specific socio-cultural and political contexts.

1.3 Using PISA for International Benchmarking

Since education is a vital national asset that contributes to economic stability and growth (Ashton & Green, 1996), the practices of setting benchmarks and surveying regional and global policy development have gained importance in local policy-making processes. At the same time, countries survey their neighbours to stay on top of the competition in the region, and international collaboration is also forged for

mutual progress (Flynn, 1995). Since the 1990s, the Organisation for Economic Cooperation and Development (OECD) has assumed an enhanced role as a global policy actor to stimulate the growth of knowledge-intensive industries and sustain the spread of technological competencies. The OECD promotes an emerging knowledge economy, which accentuates the political importance of educational practices (Meyer, & Benavot, 2013; Marginson, 1999). Additional importance is placed on the mastery of higher order skills such as critical literacy, critical numeracy and cross-curricular competencies. Students are then able to exercise critical thought processes to solve problems and make decisions in everyday life as well as benefit from instruction by comparing, evaluating, justifying and making inferences (Forster, 2004).

The OECD introduced the Program for International Student Assessment (PISA) in the mid-1990s to provide member countries with comparable datasets of student achievement in reading, mathematical and scientific skills. Since the year 2000, PISA has ranked the performance of participating countries on both the learning outcomes and skills of their 15 year old students (OECD, 2011b). PISA has thus provided education policymakers with an additional point of reference when reviewing domestic policies and programs. However, policymakers are not wholly convinced of the reliability of macro-level quantitative data like that produced by PISA; as it does not necessarily provide the kind of evidence that they need to redevelop policies that are fit to purpose within their own educational systems (Graham & Stevens, 2009). Still, the OECD has become a key supranational actor in standard-setting multilaterism with comparative data production and transnational networks promoting new forms of educational governance (Grek, Lawn, Lingard, Ozga, Rinne, Segerholm & Simola, 2009).

In just one decade, as a new global order was beginning to emerge, PISA (OECD, 2000; 2003; 2006; 2009) refocused political attention on the economic value of education for human capital development (OECD, 2010b). The necessity for individual nations to retain their competitive advantage in an international marketplace, challenged by the rise of Asia, has produced a new level of anxiety about the capacity of future citizens to maintain the level of prosperity currently enjoyed in dominant Western liberal democracies amid looming global recession (Graham, 2007b). Governments recognise that the higher order conceptual and processing skills assessed through PISA are crucial to maintain economies reliant

upon value-adding, technology and intellectual capital. A nation's standing in the PISA rankings is measured by student performance in reading, mathematics and science. The PISA expert group also collects and analyses education-related data such as national drop-out rates and the achievement gap between schools, and between students in terms of gender and socio-economic background using the PISA context questionnaires (Gorur, 2009). Analysis of PISA data has drawn attention to policies and practices that produce higher and more equitable educational outcomes (Schleicher, 2009), together with those that produce inequitable outcomes. There is subsequently increased attention on restoring balance in terms of equity, particularly related to low school attainment and dropout rates (Schleicher, 2009).

International comparative research shows that the distribution of educational achievement is highly inequitable in some countries that otherwise have high quality educational systems (McGaw, 2007). Some countries have shown a greater capacity to support their lower-performing students to achieve higher outcomes, with only a small percentage of students grouped in the low proficiency bands; leading to a shorter low-achievement tail which minimises the influence of social class, gender or ethnicity on educational outcomes (Perry, 2009). The two aspects of quality and equity are jointly depicted in four different quadrants in the PISA performance outcomes (high quality/high equity; high quality/low equity; low quality/high equity; low quality/low equity). The PISA results have shown that high levels of performance do not have to come at the expense of equity when there are countries that have high average reading scores and small achievement gaps between students from different socio-economic backgrounds. Countries that fall into this category include Korea, Finland and Canada (OECD, 2004c). Major education exporters such as Australia, UK and the US have failed to top PISA rankings in the three literacy domains, which include reading, mathematics and science, and scholars have worked hard to understand why (DuBois-Maahs, 2013; Jerrim, 2011; Peterson et al., 2011; Thomson et al., 2010).

Countries that are able to raise the education performance of their students while reducing academic disparities are found to effectively provide accessible student support structures and spread available resources across a wide population so that learning obstacles attributable to gender, socio-economic status or ethnic origin are mitigated (OECD, 2008b). Education for all is endorsed by ensuring a basic

minimum standard for reading and writing is attained by all students. This is particularly notable in the case of Finland where only 1% of Finnish 15-year-olds have not acquired fundamental functional reading skills compared to the OECD average of 7% (OECD, 2008b). On the contrary, the selection of pupils based on academic achievement and the freedom of school choice are common practices in England, US, Australia and many more (OECD, 2008b). Social differences between schools can be exacerbated as students from privileged families tend to have the advantage of choosing and paying for their schools of interests as well as the resources to fulfil their academic needs.

1.4 The Case for Comparative Case Studies

This study aims to understand how education policymakers from NSW, Scotland, Finland and Malaysia have reacted to these globalised movements and what impact they have had on the support system designs. The study was aligned with two fellowships held by the principal supervisor: Australian Research Council (ARC) Discovery Postdoctoral Fellowship *(DP1093020; A critical analysis of the increase in diagnosis of special educational needs in NSW government schools)* and the Macquarie University Research Fellowship *(The political economy of special educational needs: an international comparison of educational trends and policy developments)*, which involved New South Wales in Australia, Alberta in Canada, and Finland in the European Union. Initially, NSW and Finland were chosen for comparative analysis as some important differences between these systems had already been noted (Graham & Jahnukainen, 2011). Malaysia was later included as the background knowledge I hold of my home country could be effectively used for the study. After a Joint PhD with the University of Edinburgh was arranged in 2010, Scotland was added to the comparison. Enrolment in the two institutions based in Australia and the UK facilitated the data collection process as Malaysia is not too distant from the Australian continent, while Finland is relatively closer to Scotland in the European region. Scotland promised to be an interesting parallel to the other three systems as it is a distinctly different system to the English, having resisted many of the harsher policy measures introduced there during the 1990s – including school markets and student performance league tables – which have since been adopted in varying forms throughout the world, including Australia.

It was argued in the previous section that the distinct approach to education governance as well as policy decisions have consequence for the academic standards and the level of equity within different education systems. The four jurisdictions under study also take part in PISA with very different outcomes in scores and ranking, which reflect upon the quality of their educational practices and policy effectiveness in raising students' academic attainment. For example, the average performance of Australian 15 year olds in PISA 2000 was above the OECD average, yet 30% of Australian students did not achieve the literacy and numeracy skills necessary to undertake further study (Lokan, Greenwood & Cresswell, 2001). This "long tail" in PISA achievement is overwhelmingly populated by disadvantaged groups: Indigenous students, students with a disability and students from low-income families (McGaw, 2006).

The performance of Australian students in PISA slipped by 13 points in reading literacy from 2000 to 2009 (Thomson, Bortoli, Nicholas, Hillman & Buckley, 2010), and Australia is the only high performing country to show such a large decline. The percentage of variance in reading performance explained by the economic, social and cultural background (ESCS) of the students is comparatively high in the United Kingdom (34%) and Australia (19%) compared to only 2% in Finland (Thomson et al., 2010). Australia is thus ranked as a high quality but average equity country in PISA 2009 (Public Policy Institute, 2011). In New South Wales, the decline in reading literacy performance was 23 score points, which is the equivalent of one-third of a proficiency level or about half a year of schooling. There is similarly a long tail of underachievement associated with location, Indigenous status and socio-economic status in the latest assessment (Thomson, Bortoli, Nicholas, Hillman & Buckley, 2010).

New South Wales (NSW) is chosen as one of the case study sites due to the special characteristics of its education system. A former British colony and strong United States ally, Australia has traditionally adopted educational policies from the US and UK. This is particularly the case in NSW where accountability measures and high-stakes testing were adopted before any other Australian state or territory (Bradley, Draca & Green, 2004). As an Australian state, New South Wales is required to conform to the 1992 Disability Discrimination Act and the 2005 Disability Standards for Education enacted by the Federal legislation (Forlin, Keen, & Barrett,

2008). However, from 1999 to 2007, the enrolment of students in government special schools or SSPs (Schools for Specific Purposes) has steadily increased, although total enrolments in government schools have fallen by 3.5% (Graham & Sweller, 2011). There is also a wide selection of non-government schools in NSW and school enrolments in this sector have risen by 22.2% in the decade since 1995 (ABS, 4221.0, 2005). This is aggravated by recent federal education policies that support the growth of market strategies by increasing funding to non-government schools (Campbell, Proctor & Sherington, 2009), although a significant proportion of this funding is allocated to the 25 independent special schools.

The National Assessment Program – Literacy and Numeracy (NAPLAN) is another Commonwealth initiative that was originally introduced to combat disadvantage and poor educational outcomes. A nationally standardised assessment format is carried out to set learning benchmarks for students in Years 3, 5, 7 and 9 while the My School website profiles the performance data on NAPLAN of all Australian schools. Publication of the NAPLAN results was criticised due to the public embarrassment inflicted upon low performing schools, many of which were in low socioeconomic areas (Australian Education Union, 2010; Lange & Meaney, 2011). The growth of independent schools and the publication of student assessment data are strategies related to neo-liberal thinking while special education expansion can be one of the perverse outcomes. These inquiries make an interesting case study for NSW under the federal rule.

In Scotland, a dual policy focus which promotes both social inclusion (Riddell Committee, 1999; The Scottish Executive, 2000) and raising standards is observed (SOEID, 1998, 1999; Pirrie, Head & Brna, 2006). The Disability Discrimination Act 1995 was adopted across the United Kingdom and the presumption of mainstream education for all children commenced in 2000 (HMIe, 2003a). The Scottish Parliament has also totally erased the term "special educational needs" from the legislation which is substituted with "additional support for learning" (Act 2004). Even though the support of social inclusion is strong, influence of neo-liberal thinking on policy has emerged in recent years. To raise performance, the government has finalised that in 2013 the Standard Grade and Intermediate exam system will be replaced with the National Award (The Scottish Government, 2009). The grade would show the literacy and numeracy proficiency of individual students and select top

performers who can begin studying for the "Highers" (the national school-leaving certificate exams and university entrance qualifications) a year earlier. Inspections and reviews are another approach to quality improvement in Scottish education as written in the Standards in Scotland's Schools Act 2000. As Scottish policies place a lot of emphasis on social inclusion, especially with a dire need to curb growing socioeconomic inequalities, the analysis of policy shifts would show whether neo-liberal discourse has made a big impact in education policymaking.

Meanwhile, Finland has attracted a great deal of international attention due to consistently high student performance in PISA (Simola, 2005). The Finnish "miracle" is sometimes discounted by educational policymakers elsewhere on the basis that Finland is a culturally homogenous society with little poverty, ethnic or linguistic heterogeneity. The Finnish model is therefore viewed in some policy circles as too dissimilar to emulate (Graham & Stevens, 2009). Yet there are other factors contributing to Finland's high performance from which other countries could learn, such as: (1) Finland engages in active social investment through universal early childhood education and a comprehensive education model that is insulated by strong social networks and interconnected agencies (Graham, 2007c); and (2) Finland provides substantial learning support assistance through a part-time special education system based on teacher referral and observation of educational need (Sahlberg, 2007; Kivirauma & Ruoho, 2007; Itkonen & Jahnukainen, 2007; Graham & Jahnukainen, 2011).

However, "school markets" and "choice policies" are becoming more popular in Southern Finland, particularly in the capital, Helsinki (Ylonen, 2009). The minimal financial resources in the North limit parental choice which indirectly causes schools to be rather uniform in standard. This contrasts with more freedom of capital in the south where education markets exist to meet different parental demands. This trend suggests that the various local areas can have their own policy priorities with contrasting policy aims, reflecting, in part, financial considerations and constraints which can have very different outcomes for equality of opportunity. These developments signal a need to sustain inclusive education by investigating how neo-liberal discourse has affected Finnish policy-making.

Malaysia is the last case study of the research. As a former British colony, education policymaking was heavily influenced by the British. This has changed in recent years as Malaysian policymakers refer widely to a range of countries from Korea to the United States. Even though the Department of Special Education was only established in 1995, there has been a shift towards integrating students with special needs into regular schools (Ministry of Education, 2004). However, limited resources, rigid curriculum and the persistence of the medical model hinder the growth of inclusive schools (Adnan & Hafiz, 2001). Malaysia has also been widely criticised by its citizens for being overly exam-oriented to the advantage of privileged students who can cope with fast-paced learning and afford costly tuition fees. Hence, Malaysia is considering the removal of at least two high-stakes assessments in primary and secondary school (Bernama, 2010), while improving the efficiency of current student support provision. These proposals have been met with fierce objection from the opposition parties as assessments are perceived as reliable tools to push student learning outcomes and school performance. The investigation of prominent discourses affecting Malaysian education system aims to shed light on why inclusion is still a distant dream in some jurisdictions.

Drawing on Gillborn and Youdell's (2000) concept of "educational triage," the discourses of educational policymakers will be analysed to determine whether low- or high-performing students are given more weight in the policy-making process, especially in the allocation of extra support in schools. What support structures have been established for students who have fallen behind academically? As a result, the analysis of similarities and differences of education policies in the four sites can assist in "the formulation of generalizable propositions about the workings of school systems and their interactions with their surrounding economies, polities, cultures and social orders" (Arnove & Torres, 2007, p. 4). Cross-national comparison can produce fresh insights on the influences on education policy-making, gaps in knowledge and alternative approaches.

1.5 Purpose of the Study and Research Questions

This research will investigate similarities and differences in the discourses used by key education decision makers in New South Wales, Scotland, Finland and Malaysia when conceptualising the aim and structure of student support services. As Australia has a federal political structure and education is one of the residual powers retained by individual States and Territory, NSW is included as a subnational unit of comparison with its unique educational policies and system of governance that are distinct to a certain extent from other States. This basis is akin to the selection of Scotland with its own power of educational management while being situated within the broader political framework of the UK. While Malaysia consists of 13 States, the federal government holds definitive decision-making authority in major education policies, leaving little space for State modification. Its consistent policy structure across the nation is similar to the situation in Finland that justifies the comparison of these two countries at a national level.

In this research, data generated through interviews with five key policy actors in each of these four regions will be supplemented by comprehensive analysis of changes in special education policy and support service provision over the past 15 years. These datasets will be integrated to build robust case-studies for each of the regions to clearly illustrate how educational support is conceived in different educational jurisdictions around the world. The global circulation of education policy discourse and its relation to the development of local education policies and practices will also be examined. The central research questions with which this research engages therefore are:

> What effect have the two discursive movements, described here as "inclusion" and "neo-liberalism", had on education policy decision-making in relation to special educational needs over time; and how has this influenced the design of student support structures in different educational jurisdictions?
>
> In each case-study jurisdiction, is there evidence of change in policy and practice over the past fifteen years?

Of particular interest is to understand the extent to which international comparisons, such as the OECD's Program for International Student Assessment (PISA) affect local policy-making processes. For example, do policymakers modify policies in response to areas of weak performance in international standing? Where does student support fit in this process, and to what extent does global competition influence local policy settings? In other words, do policymakers rely on international comparative data as a benchmark of best practices to assess the development and effectiveness of past and present policies, or do they deny its importance completely? Do existing comparisons provide useful knowledge of international examples, which propose alternatives for action and/or innovative measures?

1.6 Limitations and Assumptions

This research will take an in-depth look at discourses that have an influence on education policy-making, particularly in the provision of education support services within different case study sites. This study does not aim to either inspect implementation of policies or education support arrangement at the school level in any of the jurisdictions. The scope is to explore the influential discourses affecting education decision-making by conducting a comprehensive multi-layer inquiry that travels through macro, meso and micro levels of analysis. Methods used include analysis of policy papers, statistics, international student assessment results, review of the existing literature and interviews conducted with a sample of education policymakers from the respective countries.

For the purpose of this research, it is assumed that the compilation of policy archives and reports rooted in each educational context generally reflect the reality in schools and local education communities although variations might exist at different localities within a jurisdiction. Policies that are made at central levels, to a certain extent, do influence the practices of local authorities and schools which can result in positive or negative outcomes even with the best of intentions. This limitation is compensated for by taking an ensemble approach to the analysis of discourses by binding context closely with education policies and the viewpoints of policymakers under the three main layers, which will be discussed further in the methodology chapter.

1.7 Conclusion

This first chapter has discussed in detail the research inquiry. The significance in understanding how neo-liberal and inclusion movements influence education policy decision-making and student support designs has also been elaborated. The following chapter further examines ideas associated with inclusion and neo-liberalism to bring greater depth to those concepts in different educational contexts.

Chapter Two

Literature Review

2.1 Introduction

Since their inception in the 1970s, systems of ideas inspired by neo-liberalism and inclusion have evolved considerably along with contemporary developments. These two globalised discourses have been the focus of inquiry of a large body of literature covering their respective tenets, progress and implications. Discourses can bring about powerful effects as the composite political ideals, economic principles and sociocultural values travel through the global space and influence the policymaking sphere. Through this complex network of influence, the neo-liberal and inclusion movements have brought about different changes in policy, system design and social formation across countries. These two major discourses are identified for analysis in this research as they have gained quite a widespread appeal to education policymakers in recent decades at the global and local levels, although the degree they have penetrated policy ideas and the design of student support structures in these four focus jurisdictions is unclear. To effectively gauge the extent of influence each movement has upon education governance in the four jurisdictions under study, deep understanding of their origins and content must first be obtained through comprehensive review of key research literature. This process will assist and inform the analysis of relevant education policies in the case studies and comparative analysis.

As it is through international integration and information technology that the interchange of policy discourses occurs, the impact of globalisation on education policy designs is first examined. This discussion is followed by a historical review of the development of special education and the movement towards inclusion, including the different interpretations of its significance, core attributes and implementation. As neo-liberalism contains a range of features developed from the field of economics, current understanding of its manifestation in the area of educational provision is examined. A brief section is then allocated to the Program for International Student Assessments (PISA), in order to (i) comprehend its impact on national education

systems and (ii) describe how it has become one of the most recognised international benchmarks for learning outcomes and an indicator for human capital by measuring students' ability in knowledge application. As PISA achievement trends reveal the level of educational attainment and equity across various national economies, it is a useful tool to gauge whether peculiar characteristics of student support structures, other contextual factors or the adoption of certain global discourses might have contributed to educational outcomes in each jurisdiction.

2.2 Education Policy-making in a Globalised World

Globalisation and inter-state competition have renewed the strategic direction and development of education policies, as well as the demands for education. The discourses which circulate at the global level have a strong influence on local education policies and practices (Bonal & Rambla, 2008). As a result of international bodies setting agendas that spur global change, such as the International Monetary Fund (IMF) and OECD, education is promoted as a tool for social mobility and national development (Tarabini, 2010). As education outcomes hold the key to economic sustenance, policymakers are eager to investigate the effectiveness of foreign systems while contemplating the relative strengths and weaknesses of local policies. Policy movements thus occur in this process through eight mechanisms of external effects detailed by Dale (1999) as borrowing, learning, teaching, harmonisation, dissemination, standardisation, installing interdependence and imposition. Throughout such complex policy transfers, Dale (1999) further asserts that it is equally important to recognise that national peculiarities still act as the basis of government educational planning even though the parameter of state policies have altered due to globalisation.

Held, McGrew, Goldblatt and Perraton (1999) argue that the illusion of national sovereignty has been shattered since globalisation has constructed "a system of multiple centres of power and different spheres of authority" (p. 33). Within this system, the core functions of state policymaking continue in the implementation of mandates, enactment, stipulations and the funding of policies based on national circumstances, although other cross-national factors also bear influence in the process. Powerful agents such as the World Bank and the OECD might introduce certain

policies which have to be assimilated into local considerations, such as the emphasis on international collaboration, international benchmarks and investment in higher education (OECD, 2009). Dale (2005) refers to the complex interactions between national education systems and these supranational influences as "the pluri-scalar nature of education governance" (p. 117), where governance activities such as special education regulations, funding mechanism and support provision are influenced by a broad set of agents including state, market, family and community at wide-ranging scales from national, sub-national to supra-national levels. Contextual and external factors exert discursive force and effects in a complex manner that results in policy decisions aimed at meeting the needs and agendas of these sources.

Even though countries are not moving towards complete homogeneity, a gradual convergence of discourses and practices is happening as a result of the Globally Structured Educational Agenda (Dale, 2000). With the new demands of globalisation, neo-liberal ideas have had a strong influence on national priorities (Macdonald & Hursh, 2006). For example, neoliberal market theory has encouraged the reduction of government intervention and the development of school markets (Mundy, 1998), however, Carnoy (1999) cautions that this finance and competition driven reform might demote equity-based approaches to education to a secondary position. Given that ideas can be borrowed, copied, amended, tested and cannibalised from other jurisdictions as a matter of policy learning, reference and exchange (Ball, 1998a), policies from different countries could be similar in nature but dissimilar in practice or different in practical details but similar in intention, which could lead to different outcomes altogether.

Halpin and Troyna (1995) observe that countries appear to be following similar patterns, but on a closer look they are not as similar as they first appear. While policymaking is influenced by local ideological belief, political commitment, viability, resources, bureaucratic procedures, time limit and personal interests of key actors, some general policies and approaches are blindly imitated without prior consideration of contextual aptness. In the educational context, Levin (1998) describes this imitation as a "policy epidemic"; whereby policymakers conveniently copy widespread educational models and practices without reflecting on the lessons learned and possible implications. As mentioned before, the globalisation of education has initiated or generated reactions of many kinds, from apparent convergence and

commonalities to distinct particularities. Policy analysis can trace how national and global discourses have merged in policy formation processes through translation and re-contextualisation to comply with local needs such as the contemporary political, social and economic conditions. This knowledge will be useful to understand the varied policy responses shown in the four specific contexts towards these global forces and pressures.

2.3 A Journey towards Inclusion

2.3.1 The Advent of Special Education

In any society, the level of acceptance given to those who are disadvantaged is evidence of its social progress (Winzer, 1993). The securement of educational rights for the disabled population is one of the important areas under scrutiny by human rights organisations worldwide. Special education plays an important role in providing a continuum of services and schooling placements for children who cannot fully benefit from general curriculum and pedagogy due to certain physical, intellectual, emotional or social developmental disorders. Specially trained educators are employed to implement interventions and technology appropriate to the requirements of those students identified as being in need (UNESCO, 1973). This field has experienced tremendous changes over the past few decades.

The instruction of people with disabilities first began in the 18th century, during the Enlightenment, when the British and French aimed to achieve a fair society in which human rights were upheld for all irrespective of social class. After its conception, children with disabilities who were previously excluded from formal schooling finally could receive an education during compulsory school age. Nearing the end of the 18th century, special education was widely acknowledged as a subdivision of general education. Pedagogical intervention was introduced widely: for instance, there was the provision of raised print for the blind and sign language for the deaf, as well as specialised instruction for groups with mental retardation and emotional disturbance (Winzer, 1993). Across different continents from America, Europe, Canada, Australia to the United Kingdom before the 1950s, charity establishments had widespread influence in social welfare and special education provision to the disabled population to foster greater independence for a better quality

of life and to alleviate the burden on society (Neal & Kirp, 1985). Such philanthropic institutions were largely perceived as a humanitarian benefaction for handicapped recipients and were not aligned with the wider schooling process of the common schools.

During the 19th century, health professionals were broadly consulted in this field to develop a list of medical categories covering various physical or psychoneurological conditions experienced by children who could not access general education for the purpose of providing targeted educational intervention (Tomlinson, 1982). The developed categories detailed various scientific definitions, types and degrees of defect and abnormality. This progression of events led to the training and provision of special education teachers for children deemed educable. The advances of psychological knowledge in the 20th century further reinforced the use of clinical diagnoses for different categories of mental disorder, which in turn came to influence decisions about special education placement for even more children who lag behind in reaching developmental milestones. Tomlinson (1982) asserts that special education has become one of the most mysterious areas of education due to the medical diagnosis and confidentiality. The operation of special schools and the experiences of the segregated students are almost completely unknown to "outsiders".

There is nonetheless considerable variation in how education jurisdictions define and categorise students to determine support provision (EADSNE, 2003; 2009). In an attempt to facilitate the comparison of special education classification systems, the OECD has introduced the resource-based ISCED-97 (International Standard Classification of Education) along three main categories — sensory, neurological or motor disabilities; emotional/ behavioural disorder and learning difficulties; as well as disadvantages arising from cultural, socio-economic and/or linguistic factors (European Commission, 2012; OECD, 2000; 2005). The specific definition and coverage of support will be discussed in each case study separately as it carries different meanings in the four education jurisdictions.

While Sapon-Shevin suggests that educational placement in segregated settings denies children the opportunity to participate in the broader community (O'Neil, 1994), Falvey and Givner (2005) voice their support for the special education structures' ability to provide effective and targeted instruction, ease regular classroom

disturbance, and foster relationships between children with disabilities. Other proponents for special education have also justified their stance with cost-benefit analyses, better support provision and outcomes as well as more meaningful learning processes (Kauffman, Gerber & Semmel, 1988; Macmillan, Gresham & Forness, 1996). Critics from the field of inclusive education however maintain that special education employs unreliable assessment criteria. Medical classifications used in special education diagnosis also attach a label of incompetence and abnormality on identified students (Farrell, 2010; Florian, 2007). Thomas (2007) also refers to other publications (OECD, 1994; Wang, Reynolds & Walberg, 1995) and reaffirms that no solid research has validated greater success of the well-resourced special education than the more inclusive mainstream education. The unintended stigma carried by different categorical labels varies in extent and intensity, and many countries have aspired to mitigate such adverse effects by replacing terms such as mental retardation with intellectual disability (Graham, Sweller & Van Bergen, 2010). For example, while emotional disturbance and behaviour disorder project very negative images, dyslexia is more positively viewed (European Commission, 2012; Riddell et al., 2005).

In an interview coordinated by O'Neil (1994), Sapon-Shevin describes special education as a "safety valve that allows schools to keep doing business as usual – labeling, sorting and segregating students" (p. 7). This is problematic on several levels. First, Graham and Jahnukainen (2011) reveal that categorical funding systems incentivise the diagnosis and withdrawal of students who experience learning and behavioural difficulties. Second, and to compound the first issue, students from different cultural backgrounds or with other social disadvantages tend to be over-represented (Harry & Klingner, 2006; Thomas, 2012). This is particularly true for "subjective" special education needs: for example, in the area of mild intellectual and language impairments (Connor & Ferri, 2007). Third, despite their stated purpose, special education programs may fulfil their intentions of individualized support. In New York, for example, Harry and Klingner (2006, p. 171) argue that special education programs have become "dead-end(s)" lacking in individualised planning, resources, or experienced teachers. Such outcomes are possible in any jurisdiction under conditions of poor implementation, funding and management.

2.3.2 The Medical and Social Models

Discourses relating to disabilities, diagnosis, treatment, normalisation and cure are anchored in the medical model: also called the diagnostic, deficit or prescriptive model (Triano, 2000). The medical model has been used within special education for decades, and is still a distinctive feature of modern educational systems. Brantlinger and colleagues (2005, p. 199) suggest however that the medical model "posits disability as a permanent, innate flaw in certain identified children rather than a social construction that depends on context and the nature of school and societal practices". In other words, disability is viewed from the perspective of pathology (Sailor & Roger, 2005), with a dichotomy drawn between "normality and abnormality, success and failure, the functional and the dysfunctional" (Thomas, 2012, p. 10). Within this model, the value of students could be reduced to their defects rather than their potential (Barton, 2003; Corbett, 1996). Farrell (2010) elaborates that the diagnostic component and labelling practice project an image of dependence among the "abnormal" children who are treated with pity, over protectiveness and fear.

Thomas has previously (2007) delineated how scientific disability recognition techniques have pervaded the educational field through adopting "the epistemological and methodological clothes" (p. 251) of medical professionals and psychologists. Employing different diagnostic tests and guidelines, children encountering learning difficulties are identified and grouped into disability criteria and functional levels to facilitate appropriate intervention and instructional process. Thus, children are systematically defined by their impairments as opposed to their specific educational needs. This practice also lacks a focus on unique individual learning difficulties as Capone (2012) explains that diagnostic predictions are constructed based on experimental conclusions of a large sample of students. Reschly also (1996) mentions that diagnostic specifications are not clearly normed and can result in different results for a student across state or school district boundaries. Rather than providing instructional support, Oliver (1996) suggests that special education which accentuates individual differences and neglects the importance of environmental improvement contributes to the longstanding oppression experienced by disabled people.

It is society which disables physically impaired people. Disability is something imposed on top of our impairments, by the way we are unnecessarily isolated and excluded from full participation in society (UPIAS, 1976, p. 3).

The "disabilities" of children founded on the rigid medical and categorical diagnoses and followed by displacement to segregated settings are shaped by a complex form of institutional discrimination (Oliver, 1996). Connor and Ferri (2007) observe that this form of special education features an act of separatism with its exclusive sphere of practices, policies, certifications and personnel. Such placements are viewed as a barrier to equity and social justice (Artiles, 2003). Stemming from the growing consciousness of social rights, the lobbying for a less segregated schooling experience emerged (Gerrard, 1994).

In contrast to the medical model, the social model came to prominence in the late 1960s when awareness grew that vulnerable persons with disabilities were being unfairly separated and marginalised in society. The social model of disability was inspired by the political ideology of the disability movement, which bid for the reformation of the disabling and discriminating society in favour of equality (Barnes & Mercer, 2004; Oliver, 1990). The disability movement initiated widespread political activism based on the rights agenda, which called for an understanding that "external, environmental factors that present barriers to education and learning" have further diminished the abilities and life chances of the disabled (Keil, Miller, & Cobb, 2006, p. 169). The movement demanded infrastructure accessibility, legal rights for the disabled and the consideration of social barriers preventing children with a disability from pursuing an education. Within the social model support is needs-based rather than diagnosis-based.

While some countries have persisted with the medical approach in special education management, Denmark and Sweden have adopted the non-categorical approach to allocate support services based on needs (Riddell, 2006; Riddell et al., 2006). Since the advent of needs-based policies recommended in the Warnock Report (DES, 1978), the UK has also abandoned its' diagnosis-driven identification system. Teachers and educational psychologists now assume the main role of determining

which students who require additional support, with medical professionals offering peripheral assistance.

2.3.3 From Integration to Inclusion

Following dialogue aiming at fostering social cohesion among all children, the concept of integration was initially introduced in Europe before spreading to other parts of the world. The integration movement supports the transfer of students with a disability from separate special educational settings to their local neighbourhood schools. The rationale was to promote healthy peer interaction and enable a more fulfiling learning experience (UNESCO, n.d.). Pijl and Meijer (2012) note that integration requires a huge paradigm of social change, including improvement in attitudes, perceptions, funding policies, building structures, curriculum, and teacher training. While there has been significant effort and change in many education jurisdictions across the world, Christine and Michael (1990) argue that integration is still restricted to the assembly of students with and without a disability within a common compound. They emphasise that the concept does not entail any well-developed process to accommodate the "new-comers" towards becoming equal participants in the school community.

Thus, the integration movement has so far failed to realise the ideals of the social model (Pijl & Meijer, 1991). Although special education systems have been reorganised to allow for integration, the broad structure of general education system remains unchanged. While many studies highlight the positive impact of integration practices (Buckley & Sacks, 1987; Carroll, 1967; Casey, Jones, Kugler & Watkins, 1988; Dandy & Cullen, 1988; Farrell, Dyson, Polat, Hutcheson & Gallannaugh, 2007; Jenkins, Odom & Speltz, 1989; Johnson, T. & Johnson, D., 1981; Staub, 1999), furthermore, others reports have revealed a shift from segregation between schools to segregation within schools. This within-school segregation – often seen in the provision of support classes – further accentuates the difference between students with and without disabilities (Crockett, Myers, Griffin & Hollandsworth, 2007; Dyson, 2007; Griffin, Jones & Kilgore, 2007; Monchy, Pijl & Zandberg, 2004; Tankersley, Niesz, Cook & Woods, 2007). Thus, a clear distinction between integration and inclusion can be seen.

The change of terminology from integration to inclusion occurred in the 1980s, and signified not just a linguistic shift but a renewed social agenda involving structural transformation of general education system for diverse learners (Vislie, 2003; Graham & Jahnukainen, 2011). Support for inclusion has been gaining steady momentum since an inclusive orientation was advocated during the World Conference on Special Needs Education in Spain (UNESCO, 1994). The Salamanca Statement proclaims the support of "schools for all", where differences are celebrated and individualised learning should be provided. It was seconded by representatives of 92 governments and added impetus to the inclusive education movement. While the two terms are often used interchangeably, with some arguments that they have blurred distinctions and many overlapping notions, Loxley and Thomas (2007) stress that inclusive education extends the comprehensive ideal in education "in which tolerance, diversity and equity are striven for" (p. vi).

2.3.4 Why Inclusion… and How?

Inclusion is a vision based on human rights and equality to include and provide all children – irrespective of their gender, abilities, origin, impairment, family background and geographical area – with access to high-quality learning opportunities (Barton, 1997; Thomas, 2012). Inclusion aims to reduce segregation and exclusion while recognising diverse educational needs and creating schools that are flexible and effective in the provision of educational services (Carrington, 1999; Lipsky & Gartner, 1996). An inclusive school provides individualised education by modifying teaching content, approaches, structures and strategies according to the needs of all children (UNESCO, 2009, p. 8).

Ferguson (1995) maintains that inclusive education promotes equal participation and expression for all children in schools and deters exclusionary practices as well as the bifurcation of the "normal" and "special". Within this inclusion framework, all children have the right to be 'included' in their local school. As discussed before, inclusion is very different from integration. While integration is limited to transferring students with special needs into ordinary schools, inclusion turns to the source of segregation and actively aims to desegregate subsystems existing within education institutions (Thomas & Loxley, 2007). Lipsky and Gartner

(1996) explain that inclusion counteracts the belief that some children are less educable than others, instead calling for schools to be restructured, deep-rooted attitudes to be changed, society to be more accepting and teachers to make learning relevant to all. Furthermore, Barton (1997) suggests that the dilemma of difference founded in the medical model is not relevant in the inclusion model as each learner is viewed as having unique needs, potential and areas where they require additional support.

Governments from many parts of the world have taken the initiative to include students with both low- and high-incidence disabilities in inclusive classrooms; with much success (e.g. Richard & Jacqueline, 2005). Following the reauthorisation of the Individuals with Disabilities Education Act (IDEA) in 1990, for example, the US Department of Education in 1999 conducted a six-year longitudinal assessment of more than 14,000 students with disabilities. Across time the students built sustainable relationships with non-disabled peers, improved their social and communication skills, and progressed academically; irrespective of disability category.

In a longitudinal study running from 1996 to 2002, Myklebust (2006) conducted telephone interviews with 760 Norwegian students and their parents. Students identified as having special needs were found to have nearly twice the chance of obtaining vocational or academic competence if supported in general education classrooms rather than in special settings. Finally, in one of the only quasi-experimental studies of its kind, Peetsma, Vergeer, Roeleveld and Karsten (2001) monitored 80 pairs of Dutch students who had been matched for learning, behavioural, and cognitive difficulties. From each pair, one student was enrolled in a mainstream school and one in a special school. Those in mainstream classrooms made significantly stronger academic progress than the other cohort. Outcomes for other students in the mainstream class were also positive, with studies showing that the presence of children with difficulties in regular classrooms does not impede either developmental or academic outcomes of the other students (Artiles, 2003; Curcic, 2009). On the contrary, Mansel and Semmel (1997) report that the non-disabled peers are found to profit through the cultivation of respect, the offering of assistance and mutual understanding.

Bourke (2009) argues that the key to inclusion lies in developing respect and accommodation for individual differences and students' diverse socio-economic and cultural backgrounds within a school community. Much of the groundwork of establishing an inclusive school starts with modifying educational institutions to adopt a broader vision of school community with shared values, having professional teachers and a committed leader as well as setting up multi-disciplinary teams to work closely with students (Barton, 1997; Ferguson, 1995; Lipsky & Gartner, 1996; 1999). All members in a school community take part in making sure that no child is neglected in learning, playing, socializing, communicating and fulfiling their potential. There must also be "equitable distribution of resources, co-operative learning, strength-based approaches to teaching and learning, culturally responsive teaching and rich curricula" (Peters & Oliver, 2009, p. 276).

Zollers, Ramanathan and Moonset (1999) explain that the construction of an inclusive school culture requires persistent effort and support from the government, society, school leaders, teachers, parents and fellow students. Concerted effort from the upper policy-making authorities, to auxiliary agencies and stakeholders and finally the school community is a pre-requisite for successful inclusion. However, Northway (1997) notes that scattered efforts to build inclusive schools are not sustainable if education policies devolved from higher authorities contradict inclusive principles. The clash of values hampers long-term progress, especially when schools are properties of government and teachers are their direct employees. Conversely, well-written education policies founded on inclusive principles will also not be realisable if there are attitudinal and physical barriers in schools (Pivik, McComas & Laflamme, 2002). Peters and Oliver (2009) have succinctly illustrated the concept of school community based on an inclusive education model in Figure 2.1 below. Fully inclusive schools require the collaboration of essential stakeholders at policy, community and school level to undertake transformative school-wide cultural and administrative changes. An inclusive school community ensures equitable distribution of resources to diverse students via an enriched co-operative and empowering educational format, an individualised curriculum and authentic assessments which are carried out by highly capable teachers who hold high expectation for all students. The needs of students take centre stage in the model and school productivity is holistically

defined in terms of social integration, educational excellence and equity, community partnership and the quality of learning.

Figure 2.1: School-community inclusive education model
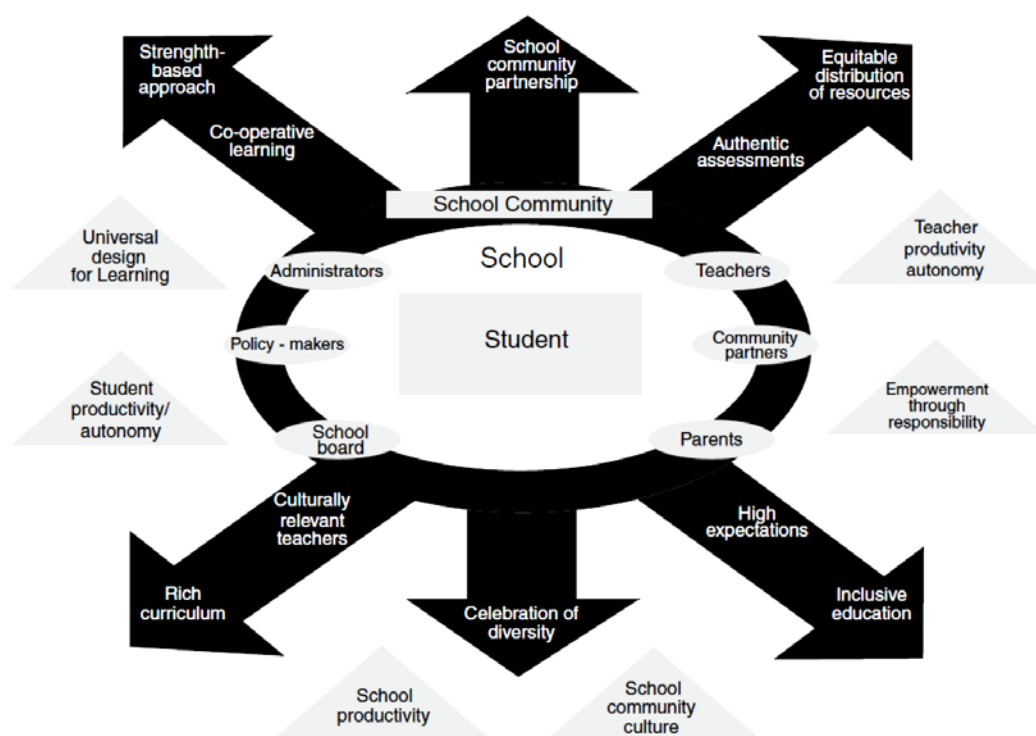
Source: Peters and Oliver, 2009, p.12

Notwithstanding findings of positive student outcomes in inclusive classrooms, concerns are often raised about how students with *severe* needs and multiple disabilities can be sufficiently supported in a regular classroom rather than in special schools and medical institutions with a high concentration of specialised personnel (Kauffman, Gerber & Semmel, 1988; Macmillan, Gresham & Forness, 1996). Ferguson (1995) points out however that inclusion is not about location of provision but the effort to make better interaction, foster a sense of belonging and create equal participation and voices among all students. Therefore, as stated in UNESCO's guidelines (2005), inclusion "implies a radical reform of the school in terms of educational policy and curricular frameworks, which includes educational content, assessment, pedagogy, the systemic grouping of pupils within institutional and curricular structures" (p. 12). In a "pull-out" model, students are removed from

general classrooms to be tutored individually in resource rooms. In the inclusivity model this strategy is transformed to one of "resource rooms for all", so that students without any evident disability can also benefit from the individualised additional support (Ferguson, 1995). Yet, Vislie (2003) concludes from trend analysis that most countries in the Western European region have not experienced any evident improvement in the inclusion of children with special needs. In the next section, challenges facing the inclusion movement are described in more detail.

2.3.5 Shifting Labels - True Inclusion is Still Far Away?

The endeavour to achieve inclusion seems to be in a quandary. While there are demands to retain special education provision, so that specialist amenities and services are accessible to students with severe disabilities, the movement to incorporate all students in general classrooms to avoid exclusion and stigma is also widely supported. Attempts to bring in children with special needs are clouded by controversy when teachers report concerns over "inadequate materials, instruction that may be too fast, lack of support or knowledge about students with disabilities, and concern that one-to-one support for students with disabilities may lead to the neglect of other students" (Curcic, 2009, p. 530).

Disagreement also lingers around the authenticate form of inclusive practices (Vislie, 2003). For example, many schools lack comprehension of the true meaning of inclusion and instead practice assimilation by getting students with and without disabilities on the same site to co-exist; however, there is no pedagogical intervention and no meaningful student interaction between the two groups (Berger & Heller, 2001; Harry, 2005). This defeats the purpose of inclusion as distinction is made between the ordinary students and those who try to "fit in" (Ferguson, 1995) to the regular acceptable norms, leading to internal exclusion (Ainscow, 2000). Likewise, the purpose of having an aide, aimed at facilitating peer interaction and lesson participation, is defeated if a student with a disability placed in a regular classroom does not actively participate in the lessons but works on a separate task. While the integration of students with a disability in mainstream schools has been largely implemented in most countries, the goals of inclusion to reconceptualise education provision are still far from being realised.

Inclusion and special education, as well as their relationships, have also been the subject of contentious debates. The fulfilment of educational rights to achieve inclusion is not well defined and can be variously interpreted on the basis of location of provision, the quality of instruction and/or the level of interaction between students with a disability and their peers (Florian, 2008). Warnock, Norwich and Terzi (2010) equally speak of the diverse views on how inclusive practices manifest in educational contexts. While Thomas (2012) states that separate educational facilities are intrinsically inferior in nature, Hornby (2001) argues that alienation of students with a disability can also happen in the mainstream if the necessary modifications and support are not provided. Many vocal academics remain reserved about the prospect of full inclusion (Kauffman & Hallahan, 1994; Puddington, 1998). Terzi (2010) argues that for some children special schools could be "the best or indeed the only option" (p. 129).

It is important to note that the views of inclusive education differ between advocates too. Supporters of full inclusion endorse well-planned placements of *all* children in regular classrooms; while other inclusion advocates call for the vast *majority* of children receiving education in mainstream schools with a focus on feasibility and overall benefits for a child. Full inclusionists view that the dual system of general and special education should be merged. Others maintain that the pivotal factors determining placement should depend on the learning needs of a child and hence special schools also fall under the broad inclusive project of meeting intensive support requirements (Cigman, 2007). Warnock (2005) on the other hand emphasises "a common enterprise of learning" (p. 32) where student needs can be met in different settings; however, ways in which the general education environment can be made more disability-friendly is not discussed.

The discussions above have outlined the development, challenges, implementation hurdles and different interpretations of inclusion. Whilst the literature indicates that a dearth of expertise and low teaching efficacy have hindered the successful assimilation of inclusive principles within the general education system, many researchers have also spoken of the resistance and lack of enthusiasm at the school level (Bunch, Lupart & Brown, 1997; Connor & Ferri, 2007; Ferri & Connor, 2006; Knight, 1999; McLeskey et al., 2001). Dunne (2009) explicates that neo-liberal education policies bear a strong effect on school practices leading to the resistive

reaction towards inclusion, especially when "the context in which inclusion operates may be characterised as a neo-liberal one" (p. 45). These "internal contradictions within policy formulations" (Grace, 1991, p. 26) highlight the complex dilemmas in policy decisions and practice.

2.4 Impact of Neo-liberalism in Education

Another globalised discourse that has risen almost simultaneously with inclusion is neo-liberalism. Neo-liberal influence rapidly gained momentum through conservative policies promoted by the Thatcher and Reagan governments in Great Britain and the US respectively (Duggan, 2003). Neo-liberal discourse has two implications for education. First, human capital is consistently underscored in education policy mandates and performance management strategies (Fitzsimons, 2002; Kotz, 2002). Second, competition is viewed as the most effective tool for educational improvement (Dale, 2006; George, 1999; Olssen & Peters, 2005). Indeed, since the 1970s - when neo-liberal economic theorists first extolled the virtues of the liberated market - some countries have used a neo-liberal economic approach towards educational management in order to address financial crises, inefficient public sector bureaucracy, and falling standards (Apple, 2000).

New features based on the performative concept have since been applied to educational governance in different countries to various degrees, of which Lingard and Sellar (2012b) identify as standardised curriculum and national standards, emphasis on literacy and numeracy skills, results-based accountability and pro-market reforms. Ball (1998) also speaks of "the politics of the sign" (p. 122). He asserts that signs of neo-liberalism can be found in education policies worldwide including a tighter connection between schooling, employment, productivity and trade; the focus on student outcomes in employment-related skills and competencies; direct central control over curriculum content and assessment; reduction of government intervention and funding in education, and an increasing community input. Those signs are not short of contradictions themselves. In addition, educational institutions seem to enjoy greater autonomy, yet there are clearer requirements of performance standards articulated by the state in accordance with human capital development (Davies & Bansel, 2007).

> We can see these two political agendas (education as a public good or a competitive private good) being played out in a variety of countries in terms of an ensemble of generic policies- parental choice and institutional competition, site-based autonomy, managerialism, performative steering and curricula fundamentalism- which nonetheless have local variations, twists and nuances-hybridity-and different degrees of application-intensity. (Ball, 1998a, p. 125)

The last decade has seen the dwindling role of some governments in financially supporting the public sector (Hursh, 2005, p.5). Although social democratic countries have maintained public state interest in guaranteeing equality of access, furthermore an analysis of education development in England and Wales, America, Australia, New Zealand and Sweden has revealed that "within the range of political rationales, it is the neo-liberal alternative which dominates, as does a particular emphasis on market mechanisms" (Whitty et al, 1998, p. 35). If welfare policies actively deter social inequalities through communal programs and fair reallocation of resources and power, the neo-liberal post-welfare policies view inequality as individuals' inadequacy to secure their position as industrious members in the marketplace (Hursh, 2005).

As neo-liberal practice in the global financial sector has increasingly penetrated educational policies and designs in various jurisdictions to different extents, this section aims to explore the emerging characteristics of neo-liberalism in the educational arena, as well as the current debates of its impact on students with disabilities and from disadvantaged backgrounds. Bingham and Biesta (2010) summarise three major attributes in recent educational reforms which are borne out of the neo-liberal ideal, namely competition, marketisation and accountability. The following discussion refers to their broad categorisation of neo-liberalism beginning with the contemplation of educational market and school choice.

2.4.1 School Choice and Marketisation

The neo-liberal economic approach emphasises the generation of maximum profit in the public sector with minimal government expenditure (Hursh, 2005). "Educational democracy" (Ball, 1998a, p. 126) is achieved through consumer choice where "buying

an education becomes a substitute for getting an education" (Kenway, Bigum & Fitzclarence, 1993, p. 116). Musset (2012) notes that school choice policies have been proposed in over two-thirds of OECD countries in the last 25 years, generally aiming at heightening the quality of education, diversifying public and private providers and promoting school innovation for parents to execute their rights to choose (OECD, 2006). Ball (1993) also mentions certain views that have been expressed in favour of a marketised education system, where bureaucracy and homogenisation of public schools by central regulations hinder responsiveness to parental demands. Such market mechanisms are argued to bring about equal access to a good education with the choice to opt for better schools, disregarding the fact that residential mobility and private schools are only within the financial reach of well-to-do families.

The marketisation of education results in huge enrolment gaps between the high-performing and the "unattractive" schools when students from better socio-economic backgrounds are more able to pick favourable schools. Schools with good achievement records are also rewarded with more government funding and resource allocation. This enrolment trend is taking its toll in New South Wales as favourable schools tend to opt for promising students while rejecting those who might pose academic and social problems (Campbell, Proctor & Sherington, 2009). This is in contrast with low-performing schools struggling to fill out enrolment vacancies (Campbell et al., 2009). Social class segregation is thus aggravated by parental choice and competitive bidding for the best schools creating obvious "winners" and "losers" (Ball, 1990, 2003; Bowe, Ball & Gold, 1992; Gewirtz, Ball & Bowe, 1995).

Moore and Davenport (1990) investigated the process of student recruitment and selection in schools within four US cities and discovered conscious bias in filtering out students with learning difficulties, poor English proficiency and behavioural problems. In the UK, parental demands for the most sought after schools have seen some schools undersubscribed and some oversubscribed (Ball, 1993). In New Zealand, school choice has caused an influx of student movement from lower socio-economic neighbourhoods into areas with popular schools (Gordon, 1995; Waslander & Thrupp, 1995). Finally, an investigation into the effects of quasi-market school selection in the United States, Sweden, England, Wales, Australia and New Zealand conducted by Whitty, Power and Halpin (1998) has also shown that racialised school hierarchies are the corollary of parental preferences and school

choice. In fact, academic choices are secondary to social choices as schools located in middle-class areas with predominantly white or non-immigrant populations are the most sought after (Gordon & Whitty, 1997). Apple voiced similar concern that UK education policies shape schools to be:

> ... increasingly looking for ways to attract 'motivated' parents with 'able' children. In this way, schools are able to enhance their relative position in local systems of competition. This represents a subtle, but crucial shift in emphasis ... from student needs to student performance and from what the school does for the student to what the student does for the school. This is also accompanied too uncomfortably often by a shift of resources away from students who are labelled as having special needs or learning difficulties, with some of these needed resources now being shifted to marketing and public relations. 'Special needs' students are not only expensive, but deflate test scores on those all important league tables. (Apple, 1999, p. 8)

Instead of diversifying schools through more choices for parents, schools are found to be increasingly internally homogenous as they strive to comply with the "sellable" image of uniformity, discipline and high performance to uprate their market value (Gordon & Whitty, 1997). Within the educational climate of quasi-marketisation, special education is constructed as a favourable niche area of excellence in service provision for children with disabilities, which has attracted more resources in segregated settings such as special schools and integrated classrooms that significantly reduces available funds for mainstream placements (Loxley & Thomas, 2001).

2.4.2 Standards-Based Reform and Competition

Having discussed the neo-liberal phenomenon of educational marketisation, another component embedded within the new economic model of public management is the institution of prescribed standards and competition to achieve better results. Government control of the education sector now pivots on "systems of regulation, incentive and sanctions" (Marginson, 1999, p. 25) by steering from a distance so that

education institutions are "caused to behave" in line with national interests. Such regulatory mechanisms can take the form of standardised assessments, school performance reports as well as stronger bureaucratic structures (Hursh, 2005). Proponents of neo-liberalism believe that academic competition in public schools accelerates school improvement and ensures the fair distribution of performance-related rewards irrespective of individual background, based on the principle of the survival of the fittest (Plehwe, Walpen & Neunhöffer, 2006). As a result, prescribed performance standards, large-scale national testing, school league tables and international assessments used for cross-country comparisons are on the rise (Levin, 1998). However, the AusAID Education Resource Facility (2010) asserts that the design and execution of high-quality testing consume a large amount of money which could be better spent for support services, facilities and teacher training.

Ravitch (2010) states that new federal mandates targeting national reading and mathematics benchmarks in America have been instated with the No Child Left Behind legislation (NCLB) in 2001. She focuses on the misuse of test results to compare performance between schools and identify schools with failing test scores for closure. High-performing schools receive financial rewards and recognition while low-performing schools might be publicly shamed in league tables (Hursh, 2005). This further privileges upper income families as the children have better chances of admission into elite primary and secondary schools and excel in high-stakes assessments. When the NCLB program obliges participation of all children in statewide educational assessments, more awarded credentials have been recorded for children with disabilities. Nevertheless, Florian and McLaughlin (2008) observe negative complications such as the emergence of new classifications and increasing eligibility evaluation, alongside manipulation of enrolment figures and test scores at the school level (Dee & Jacob, 2010).

Others have also cautioned that standardised tests of achievement could misrepresent real learning with regurgitative test-taking abilities leading to unhealthy test preparation practices (Cizek, 2005; Darling-Hammond, 2010; Jones et al., 1999; Koretz, 2005; Koretz et al., 2001; Lingard & Sellar, 2012a; Nichols & Berliner, 2007; Taubman 2009). Stobart (2008) further points out that, in spite of certain short-term performance gains, prolonged reliance on testing leads to a reductive education system. High-stakes assessments also carry detrimental consequences for students

who experience difficulties with learning, those who are unmotivated to study for examinations, or those from culturally and linguistically diverse groups who find it difficult to follow test questions designed for the average population. Individual differences and talents are often neglected (Peters & Oliver, 2009), thus exacerbating problems with engagement. When children from under-privileged backgrounds and those with disabilities do not have equal stakes in academic competition, selective tracking, segregated instruction and exclusion become the by-products (Marks, 2006).

Inadvertently, inequalities between schools are exacerbated as the competitive examination system places pressure on teachers. There is little space for administrative and pedagogical difference as curriculum, state-wide testing and regular inspections dictate the scope of syllabus and the list of competencies to be evaluated based on national standards (Ranson, 2006, p.466). As secondary schools are appraised based on the percentage of students with passing grades, teachers are more inclined to focus on potential students who stand a chance of achieving a pass mark while those who are disadvantaged are not given due attention (Gillborn & Youdell, 2000; see p. 9). Standardised tests also entail sorting students in different ability groups and educational tracks within schools or worse, transferring weak performers to other institutions. These practices, termed "educational triage" by UK researchers Gillborn and Youdell (2000), strengthen the link between socioeconomic status and educational outcomes (Gamoran, 2000; Marks, Cresswell, & Ainley, 2006; OECD, 2009; Perry, 2009).

2.4.3 Accountability: A New Modality of Central Control and Intervention

Accountability denotes expectation and requirements for staff to justify their actions, decisions or performance against a set of objectives or plans laid down by higher hierarchy of an institution (Ranson, 2003). It first took root in commercialism but has since been widely adopted in the public sector. Accountability is a measure of quality assurance and performance management initiated by the government to ensure civil servants abide by the stated objectives, reach national targets and fulfil the needs of the community in their employment. The government may offer reward to those who reach performance goals or impose some form of penalty to those who do not conform to the laws and objectives set by the central authorities (Stapenhurst & O'Brien, 2006). At times of economic instability, focus on output and standardised

quality assurance are seen as the most efficient driving force for organisational improvement without excessive cost and involvement from the central government (Hursh, 2005).

Accountability in education is instigated with a form of indirect steering which attempts to maximise academic performance in schools by distributing governmental guidelines and carrying out regular school inspection[1]. Cowie and Croxford (2007) indicate that intelligent forms of accountability, which rely on collaboration, teamwork and professional trust, are still lacking in many countries. They further suggest that inspection outcomes should be extended to values, citizenship, life skills, inclusion and diversity, rather than school attainment only. Nonetheless, corporate-driven accountability cultures in education do encourage the setting of academic targets, competition between schools through league tables and above all the normalisation of conduct of teachers and schools (Ball, 1998a). This competitive performativity inflicts much stress on school employees as they are obliged to abide by stringent bureaucratic regulations, meet demands of enormous paperwork load, face frequent inspections, rush through assigned curriculum syllabus with students and answer to school performance (Ball, 1999; Keddie, Mills & Pendergast, 2011). This paradox has been described as "simultaneously loose and tight" (Peters & Waterman, 1982, p. 318) and "controlled de-control" (Du Gay, 1996, p. 61) with "a new paradigm of public governance" (Kikert, 1991, p. 1).

Some Western countries introduced accountability within schools in the mid-1980s to promote self-management and thereby drive greater efficiency, productivity and self-sufficiency in line with market forces (Chubb & Moe, 1990). Schools thus receive centrally-prescribed directives across the board from detailed curricular content of each grade for various subjects; competences expected to be taught by the end of school year; standards for development; program planning and implementation; assessment grades and tools; code of conduct; student and school record guidelines; annual performance report and even the model for school board protocol, just to state a few (Cooley & Shen, 2003; Sirotnik, 2004). As opposed to steering schools from a distance through central prescriptives and accountability

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[1] School inspection is not necessarily indicative of neo-liberal thinking, as it can be the response of a social welfare regime. In Scotland, for example, school inspection is used to assure quality provision for children (McGlynn & Stalker, 1995).

mechanisms, welfare states generally offer more generous financial assistance and supply of facilities to ensure educational goals can be accomplished besides getting actively involved in planning and policy implementation (Ball, 1998b).

In contrast, neo-liberal proponents focus on "intervention in management practices, the control of decentralised processes and the evaluation of the success of policies" (Gordon & Whitty, 1997, p. 455), with governments pulling the strings from above. Government intervention has evolved towards lesser involvement but greater control and demands through strong centralist policies, planning and performance evaluation. The publication of school league tables in England and America is also aimed at stimulating "positive" competition by showing how well different schools reach national standards; while this inter-school comparison is intended to push the standards higher (Lingard, 2011). With all these control mechanisms in place, education is unlikely to transform into a fully privatised system or "marketised" public sector (Gordon & Whitty, 1997) but the modality of intervention and evaluation would lean towards distant steering from policymakers and education authorities.

Many academics argue that neo-liberal economic measures have in fact exacerbated the student achievement gap and quality of schooling whilst inducing unhealthy pressure on both teachers and pupils (Artiles, 2003; Beckmann & Cooper, 2004; Marks, 2006; Norwich, 2008; Peters & Oliver, 2009). Wößmann, Lüdemann, Schütz and West (2007) however affirm that accountability measures such as external examination, teaching evaluation and school comparison are conducive to increased performance. Halinen (2006b) alternatively highlights that Finland has shown consistent educational excellence and equity in international student assessments without the need for high-stakes testing and annual school inspection. Instead of liberating schools from excessive bureaucracy, Hill (2003) reasons that results-based management through rigorous central scrutiny has unfavourably caused greater pedagogic restriction. This restriction in turn lowers teacher professionalism, heightens fear of failure and changes the core purpose of education, from shaping the minds of individuals into topping in achievement and ranking (Walker & Stott 2000, p. 67). Chitty and Dunford (1999) also conclude that the mounting pressure on schools has dramatically increased student exclusion rate in England as schools need

"to protect their reputations for discipline and good order locally" (Trowler, 1998, p. 19).

Thrupp (1998) refers to accountability practices of the Education Review Office (ERO) in New Zealand and the Office for Standards in Education (OFSTED) in England and reveals that those systems cultivate the politics of blame to hold schools and incompetent teachers entirely responsible for failing scores irrespective of the wider socio-economic influence. In another study involving questionnaire survey and in-depth interviews of a large sample to determine the implementation effects of OFSTED, Brimblecombea, Ormstonb and Shaw (1995) document lowered self-esteem, growth of anxiety levels and burnout as well as increased workload among teachers. Ravitch (2010) spoke of an even more drastic repercussion in the case of school inability to meet expected standards in America. The low-performing schools are obliged to opt one of the five pre-determined punitive options, which could result in staff replacement, charter conversion, privatisation, state seizure or major reorganisation. Finally, Cole (2006) recounts the compounding perverse effects of such tight central standard-based control impacting students with disabilities including dropping completion rates, dispossession from mainstream schools, demotivation to learn due to narrow assessment criteria and being targeted as scapegoats for school failure. Together these authors show that neo-liberal approaches to education governance have brought about many unintended adverse consequences.

In the strive for efficiency and excellence through competition and accountability, neo-liberal ideology fails to address the fact that "not everyone has an equal 'stake' in the success of the new economic order" (Ball, 1998a, p. 120). The old politics of equality in education can be affected by the neo-liberal transformation. Although policy documents still talk about equity goals and individual social mobility, economic emphasis is by far more dominant (Marginson, 1999). The elevation of performative management and educational marketisation in the increasingly interconnected world has strengthened the competition of national economies to surpass each other in building the local talent pool and world-class educational institutions (Bourdieu, 2003). Promoting international competitive standards to enhance labour market dynamics and trade, the OECD introduced PISA to "constitute the globe as a commensurate space of measurement" (Rizvi & Lingard, 2010, p. 99).

2.4.4 International Student Assessment

The fierce competition between countries is not limited to wealth, political power, technology and development, but also in education where they race to climb up the ranking in international student assessments. Indicators of an advanced education system include a large percentage of high achievers, a small achievement gap and minimal student variance among and within schools across regions, which reflect skilful human capital and economic stability (OECD, 2007a; 2009). To identify what constitutes a productive world-class education system, the OECD has designed a tool to rate the status quo of education systems in terms of excellence, equity, international standing and competitiveness.

Developed in the 1990s, PISA (Program for International Student Assessment) provides learning outcomes data of 15 year olds in three core domains including reading, mathematical and scientific literacies and is conducted every three years. Results of PISA are also analysed to discover how student motivation, family socio-economic background, local contextual elements, teacher professionalism and school factors contribute to national performance and are broadly reported in the media. The role of education support provision in contributing to educational equity and excellence is also examined in many OECD publications (OECD, 2004a; 2007b; 2008b). The intention is to provide "efficient, scientific and technical means to develop educational policies which achieve optimal outcomes" (Berg & Timmermans, 2000, p. 31; Carmichael, Wilson, Finn, Winkler & Palmieri, 2009), and to "work out future scenarios and offer policy direction" (Gorur, 2009, p. 1). With the participation of European countries and beyond, PISA sets the global benchmark as a powerful tool of universal education governance that steers education policymaking (Grek, Lawn & Ozga, 2009).

It is no mean feat to standardise the international student assessments and to collect associated data in each participant country. Much technical criticism of certain methodological issues and the validity of findings have been received (Bracey, 2008; Goldstein, 2004). There is always basis to dispute the reliability of large-scale assessments but some findings derived from PISA for more than a decade have shown some solid indicators of high-quality education systems. Schleicher (2009) conducted a cross-country analysis based on PISA results and found that some countries have

maintained consistent and predictable student attainment with little variation in performance between schools. Nevertheless, Kjærnsli and Roe (2011) inform on the large scale exemption of students with disabilities from PISA in most participant countries (OECD & EC, 2009). The PISA guidelines disseminated by the OECD specify that such exclusionary measures are allowed and the real performance of the broad student cohort can be distorted to varying degrees based on the exemption rate of different countries.

PISA results hold great importance for educational policymakers as success that stems from local practices that work and effective policies that enhance teaching and learning and an education system that is built on professionalism, support and teamwork are worth learning about. It enables policymakers to evaluate both strengths and weaknesses in their own national policies and practices, in order to understand why some countries achieve better and more equitable learning outcomes (OECD, 2004b; 2004d).

2.5 Conclusion

The influential discourses and the prominent shifts in special education development have been discussed in this chapter. While the medical and social model approaches to disability have both influenced the conception of student support services worldwide, different jurisdictions have assimilated those principles to varying degrees in accordance with contextual circumstances and the wider political culture. Similarly, the neo-liberal model of development appears to have had greater impact in certain societies depending on governance principles, historical legacy and other factors. While the discourse of inclusion has pervaded policymaking and gained global endorsement, the actual deployment into school settings has progressed to a lesser extent.

In particular, the neo-liberal discursive trend, which promulgates market-led social restructuring, can have a counteractive impact on the inclusion movement aiming towards social cohesion and equality. While these two discourses are immersed in an epidemic of education policy (Levin, 1998), it is crucial to explore the patterns of influence, scale and implications they have had in the four distinct societies, especially on issues such as equity, access and quality of education

provision. As discussed in Chapter 1, the selection of the four sites - New South Wales, Scotland, Finland and Malaysia - makes an interesting combination to show the different development of special and inclusive education in their specific contexts. Their acceptance and resistance of the neo-liberal doctrine in relation to educational policymaking will also showcase relevant causes and effects. The methodology employed to gain insights into this line of inquiry is discussed in the following chapter.

Chapter Three

Methodology

3.1 Introduction

This chapter describes the methods used to carry out the current research. The study employed a cross-national comparative research design based on the "Russian doll" approach (Chong & Graham, 2012) to investigate the effects of two dominant discourses – inclusion and marketisation – on education policy-making and the provision of student support internationally. To compare the four jurisdictions in question – that is, New South Wales, Scotland, Finland and Malaysia - four multi-level nested case studies were built. Each case study situated the perceptions of policymakers and shifts in education policy in both local and global contexts.

Halliday (2002) describes discourse as a unit of language which is larger than a sentence and is firmly anchored in a specific context. The types of discourse can range from political, economic, medical, culinary, and so on. Each discourse has distinctive linguistic features and essential concepts that are consistently circulated in public and professional dialogue. For instance, the inclusion discourse would contain notions of human rights, compassion, respect for diversity, proactive support, organisational change, flexibility and equality in schooling access, participation and opportunities (Booth, 2005); while the neo-liberal discourse would contain notions of free markets, distant steering, managerialism, high-stakes central inspection and accountability, standards, marketisation and competition. The analysis of data was carried out with this understanding of each discourse.
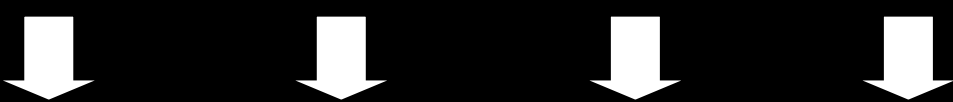
3.2 Research Design

International comparison requires in-depth understanding of the systems under study as similar terms might carry different meanings in another context. The system structures, policy and operational frameworks, national goals and bureaucratic language are also very dissimilar in different locations. This chapter outlines a conceptual framework founded on the Russian doll approach of multi-level nested

case studies to better understand local responses to the inclusive education movement and the neo-liberal market agenda (Chong & Graham, 2012). Crossley and Jarvis (2000) point out the "potential of more varied and multilevel units of analysis, including global, intra-national and micro-level comparisons" (p. 263). Multi-level case studies offer the epistemological advantage of showing how systems, structures, or processes manifest on the ground. The approach was particularly useful in examining specific tensions, reactions and assimilation that occur in a particular context.

Dale's (2005) concept of pluri-scalar analysis recommends supranational, national and sub-national levels of analysis; while the importance of adopting a "case for the case" approach was drawn from Crossley and Vulliamy (1984). Crossley and Vulliamy (1984) note that each case study should be examined comprehensively in its rich social, cultural and historical context. Furthermore, the nested macro, meso and micro layers embedded in each case study had a systematic funnelling effect that probed from the wider context, deeper into the policy structure through to the perceptions of policymakers. Table 3.1 below displays the targeted research questions and methods employed in the three levels:

Table 3.1: A conceptual framework to build "nested" case studies for vertical and horizontal comparison across and between international contexts

The "Russian Doll" Approach			
Taking a "Russian Doll" approach to international comparison in education by augmenting Crossley and Vulliamy's (1984) "case for the case" approach with Dale's (2005) concept of pluri-scalar analysis (Chong & Graham, 2012), this project will analyse what discourses bear the most influence in the conceptualisation and design of student support services across four international contexts.			
CASE 1 *New South Wales*	CASE 2 *Scotland*	CASE 3 *Finland*	CASE 4 *Malaysia*
⬇	⬇	⬇	⬇
PHASE I: "CASE FOR THE CASE" ANALYSIS (Crossley and Vulliamy, 1984)			
Stage (a) Macro-analysis: Structure from without			
What does education mean here and who/what is it for? How has educational provision shifted over time and what has this meant in terms of parallel organisational structures (special/general/inclusive)?		Methods: Build "nested" case-studies through comprehensive review of the literature and historical analysis of social, cultural and political forces that have shaped the philosophy and organisation of the education system over time.	

Stage (b) Meso-analysis: Structure from within	
Do changes in policy discourse reveal shifts in procedure and practice; which discourse/s are prevalent at what time; and, in what direction do these appear to be heading? Is there evidence of growing concern over particular student groups? If so, how are these groups defined? Which students are targeted for support, has this changed in recent years and, if so, why?	Methods: Development of a "case for the case" policy library and timeline to determine what discursive traces are evident in past policy documents, and how these do/do not reflect the macro forces identified in Phase 1.

Stage (c) Micro-analysis: Mining the evolution of student support, rationale & practice	
How are these policy-text discourses reflected in the "live" discourses used by policy makers from various departments within the education system and does their prevalence differ? *How do policy makers themselves define student support and target groups? Where is the bulk of student support directed and to whom?*	Methods: Analysis of semi-structured interviews with policy makers from each jurisdiction. Juxtaposition of interview discourses with "text" based policy discourses to determine what themes "bleed out" over time and which remain constant.

PHASE II: CROSS-CASE ANALYSIS			
CASE 1 *New South Wales*	CASE 2 *Scotland*	CASE 3 *Finland*	CASE 4 *Malaysia*
Identification of appropriate "objects of comparison" and points of "convergence" indicating supra-national influence and globalising discourses (Dale, 2005).			

The framing of macro to micro analysis was depicted in a hierarchical form to better illustrate the analytical process taking place for the individual case studies prior to cross-case analysis. The nested data structures were explicitly modelled in the hierarchical arrangement to facilitate the analysis of complex data sets as discourses influencing student support structures circulated at both international and local contexts (macro), manifested as ideas, strategies and measures in policy documents (meso) and surfaced   in the speech of interviewed policymakers from the four educational jurisdictions. The "Russian" doll approach could have been represented as expanding or nested circles as the meso-level policy data was directly influenced by and was embedded as a subset within the wider macro-level political and socioeconomic environment; which also held true for how micro-level policy discussion was based on the broader policy structure. However, as each level was more refined than the level above, it was the intention for the study to tighten the discussions into stronger themes further down each level. This goal could be achieved

more readily by methodically presenting the analysis in a hierarchical scheme which had a well-defined role for each level.

The multi-level nested model (see Table 3.1) enabled both "vertical" and "horizontal" analyses across the three levels to study the phenomena of policy making in all its complexity. The vertical analysis cut through the geographical, demographic and societal dimensions of each case study to ensure "ecological validity" (Crossley & Vulliamy, 1984). It provided data on the political, social, economic, and cultural variables within a context in detail which were then related to education policy development and school support services. These contextual influences are usually the main factors taken into consideration by policymakers when designing policies to serve as solutions to certain local problems (Watson, 1999). On the other hand, the "horizontal" analysis probed into similarities and differences across the four education jurisdictions based on a few central themes. The analysis of issues under study proceeds in successive steps beginning with the structure 'from without' at the macro level, to the structure 'from within' at the meso level, and finally to flesh out the fine details at the micro level of analysis (Chong & Graham, 2012).

The macro level primarily focused on the national and supranational agendas in an effort to comprehend local and international socio-political forces affecting education policy-making and development. Constraining research methodology within a country is likely to cause "methodological nationalism" (Dale & Robertson, 2009). This level considered how neo-liberal ideology and hegemonic forces impacted equity-driven reforms, as well as how international league tables such as PISA and the Trends in International Mathematics and Science Study (TIMSS) influenced policy-making. It also aimed to understand how special and inclusive education models were conceptualised in the four settings and the discourses at play. Information was drawn from a comprehensive review of relevant literature and historical analysis. A multidisciplinary approach was employed to extract data from various social science disciplines—sociology, politics, economics, geography, cultural studies, anthropology and history (Altbach & Kelly, 1988). Basing analysis in context for each case prevented the "misapplication of findings and the (often unrealised and misunderstood) policy-oriented potential" (Grant, 1977, p. 76). The macro level was the contextual platform on which the meso level was based for the four case studies.

The meso layer of analysis explored the actual policy frameworks over time by building an extensive policy library for each of the four case studies. The development of past to present policies was captured through the construction of four policy libraries spanning a 15-year timeline. The policy library paved the way to "trace the conceptualisation of ideas and the formation of knowledge over time and space to produce an individual, historically contingent social, cultural and educational discourse" (Novoa & Yariv-Mashal, 2003, p. 435).

As mentioned in the limitations of the study in chapter one, policy implementation or practice at the school level could not be carried out due to the time limit, number of jurisdictions and complexity of inquiry under study. It would be more possible to include school-level practices as the micro level in a stand-alone study that did not attempt to examine supranational forces. Hence, "micro" in this study referred to individual viewpoints and the attention to detail in terms of methodological approach. Twenty semi-structured interviews with 5 policy makers from each region were conducted to provide a "real time" perspective of policy development. While the meso level analysis of policy documents was broadly thematic, the study benefitted from a closer scrutiny of individual words and phrases used in the "micro" analysis of interview transcripts. The level was viewed as part and parcel of the larger structure of the Russian doll approach by placing expert opinions and experiences on an equal footing with official policy documents. The discourses obtained from the text-based policy archive were then compared to the "live" policy discourses used by policymakers to determine how well they corresponded to each other. This method enabled the use of a variety of sources and data, also known as triangulation, to enhance the validity of findings.

After the three-tiered vertical analysis was completed, cross-case analysis was conducted to identify trends and prominent themes. In so doing, this approach enabled better understanding of the intricate processes of policy-making and the detection of competing educational discourses and their effects on policy development and system design (Chong & Graham, 2012). It tied context closely to the research inquiry, established the link with globalisation and fulfiled the potential for conceptual or practical application, especially in increasing the understanding of other systems (Chong & Graham, 2012).

3.3 The Selection of Documents

The sampling process for the macro and meso level started with searching for official and public documents. Literature searches were carried out in order to obtain international and national documents that provided relevant information on the political scenario, socioeconomic contexts, education policies and support services in the four jurisdictions. First, an electronic search was conducted of all peer-reviewed journals and public official documents published between 1995 and 2011 using online databases including ERIC, Scopus, Informaworld, Taylor and Francis, Google Scholar, electronic books and government archives and websites.

Combinations of a few keyword entries such as "historical development", "education policies", "special education", "inclusive education", "disability" and "neo-liberal development" were applied in the electronic searches to ensure that an equal breadth of literature base was covered in each region. Supplementary internet searches were additionally conducted to obtain more related information peculiar to each jurisdiction. As a result, official documents, public policy proposals, manuscripts, press releases, government publications and UNESCO reports were collected as primary sources of information to build a solid policy library for each jurisdiction. Furthermore, historical and policy-related journal articles and PISA reviews served as secondary sources. Interviews with policymakers were also regarded as first hand information in support of primary and secondary data. The documents were selected based on their relevance to the research objectives.

3.4 Ethical Approval

A set of ethical guidelines must be addressed in order to provide protection for the participants involved in this research. Ethical approval was sought from both institutions through the relevant Human Research Ethics Committees. Some ethical protection for participants included voluntary participation, consent forms for interview participants and confidentiality of interviewee identity. The research was approved by the Macquarie University Human Research Ethics Committee (Approval No. 5201001137(D)[1]), Moray House School of Education Research Ethics Committee and the Malaysian Research Promotion and Co-ordination Committee,

Economic Planning Unit, Prime Minister's Department (No: 40/200/19/2692) with a research pass.

Ethical review was not required in Finland as advised by several employees of the ethics committee secretariat whom I contacted as the study did not contain any features specified in the official document of National Advisory Board on Research Ethics nor involving scientific research methods such as hypothesis testing and laboratory experiments. Prior to the recruitment of research participants, relevant departmental permission to recruit participants was obtained within each jurisdiction and was forwarded to each ethics committee. All interviews were audio-taped following reassurance to participants that their responses would be anonymised. Codes were used to conceal the identity of participants. Data were also managed appropriately so that the consent forms, recorded audio files and transcripts were copied and filed safely.

3.5 Procedures and the Selection of Participants

The selection of interview participants was based on purposeful sampling targeting key education decision makers who were involved and experienced in policy-making to be able to comment on the historical development and underlying philosophy of the education policies and student support services in their jurisdiction. The postal addresses and contact details of potential participants were sourced through relevant departmental databases. Research information statements and invitation letters were sent via post to potential participants. The letter contained the title of the research, ethics committee approval reference numbers, project aims, researcher contacts, interview protocol and questions, a statement regarding ethical protection, and a consent form (see Appendix E). The participants were informed that they could decline or withdraw at any time without having to give a reason and without any consequences. A follow up phone call was made to discuss the research and confirm participation. Written consent was obtained before the commencement of data collection and reconfirmed before each interview.

Participants included senior staff members in charge of education policy development. It is crucial for the research to invite participants from a range of education departments such as student support, curriculum, school administration,

workforce management and education assessment in the four regions as their decisions and actions directly affect students with special education needs. For instance, curriculum design has strong implications on the inclusion of students with additional support needs, optimally that which allows for flexibility and creativity in instructional modification to reach holistic educational objectives and student development for diverse learners. Problems were encountered during the phase of recruitment in NSW as a few potential participants from the Curriculum Directorate, which were separately invited for interview, gave the same response of rejecting our invitation and redirected us to the Disability Programs Directorate.

This incident only occurred for this site as Malaysian, Finnish and Scottish policymakers from a range of departments and directorates did not express any disconnectedness from the topic and were willing to participate and contribute to the debate. While there is no separate management between general and special education in Finland, distinct special education units exist in Malaysia and Scotland. In Scotland, many prospective participants also turned down interview invitation as educational departments were hectically preparing for the Scottish election with major staff reshuffle. Through persistence, adequate participants with policymaking and advisory roles were successfully recruited from the Scottish government, executive bodies and national agencies.

3.6 Interview Schedule

Approximately 20 semi-structured qualitative interviews of 40-90 minutes duration were conducted with education department personnel from policy development, management, implementation and evaluation at central, regional and local authority levels. Interviews with policymakers commenced in New South Wales, then Malaysia, Finland and finally Scotland. There were five participants per region. As this project is aligned with another study (Australian Research Council Discovery Project, DP1093020) led by my principal supervisor, Dr Linda Graham, all five interviews with New South Wales policymakers were co-conducted and the data is shared for research and publication purposes. Table 3.2 shows the data collection itinerary, date and each participant profile.

Table 3.2: New South Wales interview participants

Date	Participant Codes	Organization	Unit	Interview Duration
18/10/2010	N1	Department of Education and Communities	Office of the Director-General	102 minutes
22/10/2010	N2	Department of Education and Communities	Disability Programs Directorate	117 minutes
28/10/2010	N3	Department of Education and Communities	Disability Programs Directorate	100 minutes
11/11/2010	N4	Department of Education and Communities	Planning and Innovation	97 minutes
17/11/2010	N5	Department of Education and Communities	Student Engagement, Evaluation Bureau	80 minutes

Table 3.3: Malaysian interview participants

Date	Participant Codes	Organization	Unit	Interview Duration
17/12/2010	M1	Ministry of Education	Curriculum Development Division	66 minutes
17/12/2010	M2	Ministry of Education	Special education division	62 minutes
21/12/2010	M3	Ministry of Education	Competency Development And Assessment Division	102 minutes
21/12/2010	M4	Ministry of Education	Special education division	76 minutes
6/1/2011	M5	Ministry of Education	School management division	32 minutes

Table 3.4: Finnish interview participants

Date	Participant Codes	Organization	Unit	Interview Duration
1/4/2011	F1	Finnish National Board of Education	International Relations	58 minutes
5/4/2011	F2	Ministry of Education and Culture	Department of Education and Science Policy	52 minutes
6/4/2011	F3	Finnish National Board of Education	Curriculum Development Unit	6 6 minutes
8/4/2011	F4	Finnish National Board of Education	General Education Department and Curriculum Development Unit	83 minutes
8/4/2011	F5	Ministry of Education and Culture	Department for Education and Science Policy	72 minutes

Table 3.5: Scottish interview participants

Date	Participant Codes	Organization	Unit	Interview Duration
3/5/2011	S1	The Scottish Government	Education and Learning Support	44 minutes
4/5/2011	S2 & S3	Learning and Teaching Scotland	International, Research and Innovation	44 minutes
4/5/2011	S4	Scottish Commissioner for Children and Young People	_	59 minutes
5/5/2011	S5	Children in Scotland	_	78 minutes
25/7/2011	S6	The Scottish Government	Additional Support for Learning, Learning Directorate	49 minutes

3.7 Interview Themes and Questions

Several factors were taken into consideration while developing core interview themes to ensure consistency and comparability of interview data among the four jurisdictions. The study is linked to another ARC project (DP1093020: *A critical analysis of the increase in diagnosis of special educational needs in New South Wales government schools*) with Dr Linda Graham as the Chief Investigator. Thus during interviews for the associated ARC project, the questions posed to policymakers and administrators from the NSW Department of Education and Communities contributed to some of the following interview topics. In addition, the exhaustive review of relevant literature, the analysis of policy shift over time and above all the research questions of the study also informed the interview themes.

During the semi-structured interviews, education policymakers from all four regions were asked to comment on (1) the purpose and aims of education in the 21st century, (2) how globalization affected education policy-making and where they thought the majority of their education policy initiatives originated. Then, further questions were posed as to (3) what extent education provision was the responsibility of government, and (4) what had been done to increase equity in education from the point of view of education department personnel. Moving on to more specific questions that would shed light on special education provision, participants were

asked to (5) define learning support, integration, inclusion and inclusive education, and which of these did policymakers support and why. Pertinent to the question earlier, they were asked to explain (6) the aims of education support services in the country and the existent policies that supported those aims, and (7) how had support for student learning progressed over time, what were the available learning support services and the nature of the eligibility threshold. Participants were then invited to speak about (8) the policies made to increase participation and reduce exclusion of disadvantaged children, and (9) how the government provided education to students from migrant families with different culture and non-English speaking background.

Looking into discourses that might have influenced policy-making, participants were asked to discuss whether (10) the dilemma between standards/ market agenda and inclusion agenda occurred in education and how education policymakers dealt with that. They were then asked to describe (11) the extent to which international comparisons, such as the OECD's Program for International Student Assessment (PISA) affected local policy-making processes. As Finland was a consistent top performer in PISA, participants were questioned whether they would (12) take Finland as a role model to improve the local education system. Last but not least, they were asked to share (13) their views on inclusive education and the barriers to full inclusion.

In these semi-structured interviews, a group of questions relevant to the research objectives were predetermined which revolved around the central themes listed above. However, some individually tailored questions were posed to different policymakers to gain clarification or probe their perceptions based on their positions in the departments.

3.8 Data Analysis

Critical analyses of both policy and live interview texts were based on Strauss & Corbin's grounded theory approach (1990) which involved manual categorisation, coding and interpretation of data sets. Policy documents and interview transcripts were treated as rich sources of information to identify themes relevant to the conceptualisation of student support design in the four jurisdictions. While the same data analysis procedures were employed, policy analysis additionally involved

determining the set of goals, actions and social change that is intended to be brought about in relation to educational inclusion, equality of rights and disability empowerment. If higher schooling standards were targeted in the policies, whether the neo-liberal approach of competitiveness and outcome-based steering or the inclusive approach of distributional equity and proactive support was adopted would be analysed. On the other hand, the interactive component of interview data provided the opportunity of evaluating the efficiency, barriers, dilemmas and constraints of policy implementation. The examination of data was conducted in the light of the Russian doll approach so that national policy frameworks determined from the meso-level analysis and interview discourses obtained from the micro-level analysis were associated with macro-level contextual factors.

The initial stage of data analysis was applying codes to the data sets using an inductive approach (Ryan & Bernard, 2003). As Yin (1994) maintains that "data analysis consists of examining, categorizing, tabulating, or otherwise recombining the evidence to address the initial propositions of a study" (p. 99); identification of themes were conducted through multiple readings of raw data and also based on the research topic to determine emerging categories which were embedded in policy and interview discourses. Once salient themes and key phrases were highlighted, a search was conducted for themes in policy documents and interview transcripts that remained unmarked. Repetitions, transitions, similarities and differences, and theory-related categories were each noted (Ryan & Bernard, 2003). Identification through repetition involved searching for those topics or "recurring regularities" (Guba, 1978, p. 53) "that occur and reoccur" (Bogdan & Taylor, 1975, p. 83) as people frequently "circle through the same network of ideas" (D'Andrade, 1991, p. 287).

Prior understanding of influential discourses gained through the literature review process was also put into use to determine and induce themes based on a priori approach, which Strauss and Corbin (1990) called "theoretical sensitivity" (p. 41–47). Themes were determined based on relevance, the connection between data and the research questions and according to some of the recurring issues in the literature review. Themes were then analysed to determine their pervasiveness across different policy texts and participants (Talja, 1999). Attention was also paid to naturally occurring shifts in speech such as pauses, turn taking, interruptions, tone changes and transitioning phrases which could be markers of themes (Silverman, 1993, p. 114–

143). As each interview participant could have "many different voices" (Gilbert & Mulkay, 1984, p. 2), interviews were critically scrutinised in order to identify patterns of consistency and deviation.

After which, cutting and sorting ensued by grouping together answers from different participants and relevant themes from several policy texts and reports. Also, the identified quotes or expressions were arranged "into piles at different levels of abstraction to identify themes, subthemes, and metathemes" (Ryan & Bernard, 2003, p. 103). This also helped to winnow valuable themes and determine their connection with each other. Strauss and Corbin (1990) pointed out that the relationship between expressions and themes are "conceptual labels placed on discrete happenings, events, and other instances of phenomena… which pertain to a similar phenomenon" (p. 61). The main task, which followed was to interpret policy and interview data through a macrosociological lens (Talja, 1999) and observe how words originating from certain linguistic resources were used by speakers or within policy documents according to different intentions and purposes (Wetherell & Potter, 1988, p. 171). The hybrid nature of inclusive educational policies was also dealt with by considering the specific context of each jurisdiction. Some of the meta-themes and sub-themes identified from the data sets are summarised in the following table:

Sites	Meta-themes	Sub-themes
NSW	Integration approach	Integration funding support
		Functional assessments through Every Student, Every School
	Neo-liberal marketisation	The expansion of private schools
		Selective schools and opportunity placements
		National literacy and numeracy benchmarks and the publication of results on My School website
Scotland	Inclusive education	The presumption of mainstreaming
		Additional support and staged intervention
		Accessibility strategies
	Implementation gap	Rising socio-economic inequalities
		Inadequate funds
	Recent neo-liberal developments	Catchment preferences and reputed schools
		Greater accountability for student performance in the Curriculum for Excellence
		Small between-school differences with high quality education provision

Finland	Inclusive education	Proactive learning support and individualised education
		Highly-qualified teachers and multi-disciplinary team
	Neo-liberal resistance	Tripartite framework and social democracy
		School-based assessments in basic education (Intelligent accountability)
		Resisting educational marketisation
Malaysia	Medical model	Disability categories and job-matching approach
		The notion of educability
		Diagnostic testing and integrated class placements
	Neo-liberal education governance	Results-based management
		High-stakes assessments and accountability
		School clusters and ranking

The analytical process decribed above was not linear in practice as constant references to the concepts of inclusion and neo-liberalism specific to each context had to be made, as well as identifying the political and cultural ideas embedded within policies and transcripts. Critical interpretation of themes was also required as the portrayal of students with additional needs by interview participants revealed a lot about societal values and the level of educational inclusion in the four distinct systems. Another issue was the high level of confidentiality within Malaysian education departments, especially when the direction of student support development and the rights of students with a disability were raised. Thus, careful scrutiny of interview data was carried out to bridge information gaps through linking associated ideas expressed by the policymakers.

Finally, data analysis was further developed by including a comparison between text-based discourses with the "live" discourses from interviews. The comparison between interview data and primary sources had the value of generating triangulation for each dataset. Those themes that emerged from policy documents and interview data were pieced together to form a comprehensive picture of the development of education support services to uncover convergent lines of inquiry and influential discourses. It was aimed at finding out the relation between components and themes within data when they fit together in a meaningful way. The themes were examined in a holistic fashion followed by justified interpretation. The next stage of

analysis involved constant comparative analysis between the data sets of each case-study site (Strauss & Corbin, 1990). As this research utilised a comparative case study approach, both within-case and cross-case analysis of the four regions were employed in order to categorise their similarities and differences and to discover emerging patterns in education support provision. In so doing, the analysis addresses the development and provision of education support in these four sites and its connection with global academic standing, student achievement, national contexts and equity.

3.9 Setting the Context: *New South Wales, Scotland, Finland and Malaysia*

Education jurisdictions worldwide have witnessed the effects of globalisation and some converging policy trends, curricular content and schooling structure. Comparison enables the examination of similarities and differences across diverse education systems and provides the opportunity to delve into the differential effects of local context and supranational forces. In this comparative research, the student support structures of New South Wales, Scotland, Finland and Malaysia were contrasted to analyse how inclusion and neo-liberal agendas have travelled and morphed over time and across space. The four sites were selected due to their mix of different cultures, philosophical traditions and types of governance. This selection also enabled the investigation of discursive interactions shaping education policy reforms and support services from an international perspective. Through the inclusion of Malaysia, it also enabled the project to counteract Western dominance in educational research and address a knowledge gap relating to non-English speaking countries. This combination of sites generates an appealing comparison and a rich analysis as reforms are always contingent upon national contexts with different educational traditions, "sometimes overlapping but ultimately unique" (McLean, 1995, p. v).

3.9.1 New South Wales

The population in Australia has reached 22.8 million (ABS, 2012) with over 7 million residing in the state of New South Wales alone. As a relatively young and lightly populated nation, Australia has for many years referred to and at times derived

educational policies and practices from its former ruler of the British Monarchy and from the United States of America (Safran, 1989). The state of New South Wales holds the authoritative power to legislate local education policies without any interference from the federal and local governments as per the Commonwealth Constitution. However, the role of federal government has gradually spread, as the parliament can "grant financial assistance to any state on such terms and conditions as the Parliament thinks fit" (Section 96 of the Australian Constitution). Federalism in Australia is unique among the studied jurisdictions; the research hopes to determine the effect of federal education policies upon NSW under the influence of prominent global agendas.

NSW is one of the highest performing states in PISA and was the first Australian state to introduce standardised testing in Years 3, 5 and 7 back in the 1990s, as well as competitive school markets. These policy decisions emphasising competitive productivity contribute to the wider discussion on neo-liberal development which makes NSW an interesting case study. Public sector management of NSW is also one of the most transparent out of all Australian states and territories which will facilitate the review of policy decisions and statistical publications for the study. In addition, some worrying trends in NSW require further research.

McRae (1996) pointed out that, despite the 30% fall in special school enrolments between 1985 and 1995 after the launch of the Disability Discrimination Act in 1992, inclusion has stalled after 1986 with significant increases in special education diagnosis and the use of support classes which were said to be operating as surrogate special schools (Dempsey & Foreman, 1997; Dempsey, 2007; Graham & Sweller, 2011). The Funding Support Program was first introduced in 1996 as the State Integration Program to attend to the mounting number of students identified in the low-support category but since then there has been an aggregation of diagnosis designed to tip children in the low-support needs category into the high support needs category (Graham & Jahnukainen, 2011). Principals and counsellors were found to advise parents to inflate their child's impairment (Graham & Spandagou, 2011).

Australia has consistently performed above the OECD average in various literacies in PISA 2006 and 2009 but between-school differences remain high compared to countries with high educational equity such as Finland and Korea. To

increase overall performance, the National Literacy Plan outlined in Literacy for All highlights the need for early diagnosis and intervention (DEST, 2005). Nonetheless, the Australian Federation of Specific Learning Difficulty Associations (2007) states that more often than not children must first show evidence of failure to qualify for additional learning support. Consequently, children with learning difficulties could advance through grades and high school without being identified or offered remedial intervention. Such an inflexible diagnostic structure clearly compromises early remediation and a deeper understanding can be built through juxtaposing with the Finnish proactive student support structures.

3.9.2 Scotland

The population of Scotland was estimated at 5.2 million in 2010; with a large proportion concentrated in the major cities of Glasgow, Edinburgh and Dundee as well as in Aberdeen (National Records of Scotland, 2011). Despite its union with England, Scotland enjoys independent decision-making authority in education which enables policymakers to enact their own legislative proposals, build the local curriculum framework and qualifications assessment (Bryce & Humes, 1999). Following the 1997 referendum, the Scottish Parliament became the vehicle of policy-making for the entire education system under the Scotland Act 1998 (Scottish Executive, 1999). The Scottish education system is worth a closer inspection as it has successfully preserved a distinct social democratic culture and national identity as well as resisted the neighbouring English selective grammar schools and school league tables.

The transfer of all children with mental impairment from all clinical environments to schools occurred following the Education Act 1974. In 1978, the report by HM Inspectors of Schools (currently known as HMIE) and the Warnock Report (DES, 1978) inaugurated the official inspection and school records of primary and secondary special education. The strive towards the welfare of these children came to fruition when the Scottish Parliament decreed the Standards in Scotland's Schools Act 2000 which endorses inclusion and the presumption of mainstreaming. The Additional Support for Learning Act 2004 is another important breakthrough as the new term — "additional support needs" highly differs from the previous rigid

categorisation of special needs (The Scottish Parliament, 2004). Any student who cannot learn effectively in mainstream classrooms is perceived to require additional support, although special schools are still accessible for several types of needs. The Act requires schools to ensure the adequacy and quality of support based on the updated Code of Practice in 2010 (Scottish Government, 2010h).

Nevertheless, there are no clear-cut regulations or imposition laid down by the Scottish Government on how to fulfil the additional needs of pupils. Moreover, the individual accounts given by school dropouts present a coherent picture that inclusive policies are not working as intended in the Scottish mainstream schools (Hilton, 2006). A thorough analysis based on the three-tiered Russian doll approach will hopefully elucidate whether neo-liberal thinking has affected Scottish education development or even hampered its inclusive development.

3.9.3 Finland

The population of Finland reached 5.4 million in 2010. More than 64% of Finns reside in towns and cities and the most populated municipality is Helsinki with 1.4 million inhabitants (Helsinki Region Statistics, 2011). Compared to Malaysia and New South Wales, Finland is ethnically homogenous and most people use Finnish and Swedish as official languages. The nation gained independence in 1917 after a long period of colonisation, first by the Swedes from the 13th to the early 19th century followed by the Russians from 1809 to 1917 (Singleton & Upton, 1998). Even though the Finnish social security system has been maintained, Lehtonen and Aho (2000) argue that from the deep economic slump in early 1990s the country had experienced economic modernisation and a fast recovery from recession. Finland then obtained European Union membership, which served as a stepping stone towards greater participation in the new globalised economy (Simola et al., 2002).

Yet, a general consensus concerning the importance of equity in education has persisted in Finland throughout those changes (Grubb, Marit, Neumüller & Field, 2005). The fee-free education policy was made in 1919 and the School System Act, which introduced the nine-year comprehensive school, was passed in 1968 (Aho, Pitkänen & Sahlberg, 2006). The Finnish policy development which runs contrary to significant educational marketisation observed in Australia needs to be explored

further, in particular how its strong economic progress can be obtained without introducing competitive markets within public sector services. Streaming and ability tracking are not practised in primary and secondary schools to prevent exclusion and stigmatisation; instead the support of students with diverse needs is given primacy (Peters & Oliver, 2009). Finland also pursued the international trend towards inclusion in its education policies (Cohen, 1985; Fulcher, 1986).

The Basic Education Act was put into effect in 1998 which pledges a safe learning environment, stronger parental cooperation and pupils' entitlement to counselling, welfare and support services (Finnish National Board of Education, 2010). This Act is reinforced by the Constitution of Finland which emphasises equal treatment of all citizens irrespective of their differences to build a common school for all. Perry (2009) also highlights that the individualised teaching and remedial support are the most likely explanations of the Finnish success in PISA, especially when Finland has many fewer low-performing students than the equally homogenous Norwegian population. The rationale behind such an extensive support system is to provide sufficient help to individual students based on the comprehensive schooling model of "Education for All" (Graham & Jahnukainen, 2011). The inclusion of Finland as one of the case studies is important to show that its neo-liberal policy resistance and the emphasis on educational equity have contributed to its consistent high PISA performance above other jurisdictions under study (Rinne et al., 2002).

3.9.4 Malaysia

The Federation of Malaysia is made up of Peninsular and East Malaysia, which in total consists of 13 states. The estimated population is 28.7 million, with almost 80% living in Peninsular Malaysia (Index Mundi, July 2011). In contrast with Finland and Scotland, Malaysia has a culturally diverse population, with many Indian and Chinese workers migrating to the Malay Peninsula during British colonisation in the 19th and 20th centuries and then settling permanently (Andaya, 2001). Independence was gained in 1957 from the British Empire which assisted the development of core education policies and secular schooling system which remain relevant today, although local adaptation and vast policy reference to other foreign countries have

happened ever since. With a GDP per capita of US$14,200 in 2009 (Index Mundi, 2011), Malaysia has one of the fastest growing economies in Asia.

Before the Second World War, non-profit religious and voluntary organisations provided protection and custodial care to help the disabled in Malaysia (Abdul Rahman, 2008). In 1946, the Department of Social Welfare was established to train those with impairments to be independent and to function socially and economically in daily living. The law for special education provision was first enacted under the Education Act 1996 and the Special Education Department was founded in 1995. The provision of educational and human rights for people with disabilities is relatively late in Malaysia and it would be interesting to evaluate how far progress has been made in this area through policy analysis. As eligibility for special education placement in Malaysia depends wholly on medical certification (Haq, 2000), this practice can be contrasted with other nations with more inclusive educational model that provides support to students whenever the need arises.

Special education is specifically for students with visual, hearing and severe physical disabilities while the integration programs are for students with moderate or severe learning difficulties who are unable to cope with learning within mainstream classrooms. The Integrated Special Education Program commenced in 1981 based on the 'least restrictive environment' policy by incorporating special education classes in mainstream schools to encourage social interaction of those children with their mainstream peers (Ministry of Education, 2004). This service provides another comparative aspect to the integrative effort established in other jurisdictions under study. Malaysia is very successful in producing high-achieving scholars but the student achievement gap is increasingly widening (Ministry of Education, 2004). In addition to inadequate assistance given to students with learning difficulties, making a comparison of the learning support given to Malaysian students to the other three jurisdictions would hopefully propel more equitable initiatives.

According to UNESCO Institute for Statistics in July 2002, the literacy rate in Malaysia was 87.4% with the illiterate population reaching up to 1.8 million people. In the past few years, Malaysia has shown considerable improvement in several socio-economic indicators like per capita income, health, education, social well-being and housing (Abdul Aziz & Ismail, 2002). As a developing country, it aspires to become a

self-sufficient industrialised nation in 2020 with economic wealth, world-class education, high standards of social welfare and political stability. However, the Malaysian political agenda prioritises the economic aspects far more than the quality of social welfare. This situation can be observed through groups who were sidelined, excluded and are unable to have proper social lives (Dora, 2000). Welfare assistance and indemnities are provided at a minimum rate and in many instances, life and educational prospects are bleak if a child with disability comes from a poor family who could not afford private education or a better living environment (Dora, 2000). Compared to the privileges of the Western world, Malaysian children born with physical or mental impairments experience much more financial difficulties and have little options for inclusive learning opportunities.

Buchmann and Hannum (2001) consider that many developing countries still have not achieved enough state strength to counter governmental barriers on their own. Those countries might have "severely limited economic and organizational resources, a lack of legitimacy, and peripheral status in the world system – in their attempts to shape educational opportunities or to boost school demand" (p. 80). With the existing constraints, they strongly believe that international organisations and Western policy ideas often bear great influence on education policymaking within developing countries. The analysis of Malaysian policy documents and interview data aims to understand in what way educational policymakers have responded to international trends influenced by inclusion and neo-liberalism.

3.10 Conclusion

This international comparison employs a multi-level nested case study approach to analyse policy documents, relevant articles and interview data with key policymakers in order to examine the provision of student support services and the influential discourses which bear an impact on educational policymaking in these four jurisdictions. The Russian doll approach, which consisted of the multi-level nested model, was able to cover historical trends, social structures, and national as well as international forces that shaped education policy-making at each site. The analytical process bound the contexts, policies and perceptions of policymakers together to better understand emerging trends, similarities and differences across nations. The

subsequent case studies adhere to the general framework of the multi-level nested case study approach to better understand the influence of inclusion and neo-liberal discourses on policy development and student support designs in four unique contexts.

Chapter Four

New South Wales Case Study

4.1 Introduction

In the Australian federation of six states and two territories, New South Wales (NSW) comprises one-third of the country's population as the largest state with over 7.32 million people (CoA, 2011a). NSW has a history of strong economic performance, accounting for 33% of Australia's GDP with a value of $420 billion in 2010-11, which was larger than the whole Malaysian economy (CoA, 2011b; Lemma, 2006). It is leading the charge towards a knowledge-based economy with 58% of the working age cohort holding post-school qualifications as the highest proportion in the country (NSW Government, 2012). The income gap between the richest and poorest 10% of the Australian population was recorded at 12.5% in the Human Development Report which was much higher than Finland (5.6%), but lower than the United Kingdom (13.8%) and Malaysia (22.1%) (UNDP, 2009). Although more than 80% of Australians inhabit metropolitan areas, a large number are still settled in sparsely populated rural outskirts making education service delivery difficult; especially for children with low-incidence disabilities (Parmenter, 1979; Ritchie, 1985).

Although NSW has the lowest poverty rate of all Australian states (9.8%), a high level of social disadvantage, unemployment and crime rate concentrates in certain communities. For instance, 40% of children living in the postcode of Lightning Ridge suffer from poverty (Lloyd, Harding, Greenwell, 2001; Vinson, 2007). In addition, the Household Expenditure Survey (HES) also reveals a higher risk of hardship and poverty among households with disability (Bond, 2009). Such deprivation extends to the Indigenous communities and it is particularly pertinent to NSW in which 29% of the total Aboriginal population in Australia resides (ABS, 2009). Although representing just 2.2% of the state's population; their share is increasing at a higher rate than the broader population (NSW Government, 2006a). The disproportionate representation of Aborigines in "special" education and the high 53% dropout rate of Indigenous groups from Year 7 to Year 12 have recently come under the spotlight (CoA, 2005; Graham, 2012).These statistics reflect the high

incidence of additional needs which NSW has to deal with and education is one of the most useful tools to break the circle of poverty among children from disadvantaged backgrounds and with a disability.

4.2 The Macro Level: Historical Background

Prior to the 1940s, initiatives to educate children with a disability came mainly from the private sector until government-operated special schools for 'educable' children started to flourish between the 1940s to 1970s (Loreman, Deppeler & Harvey, 2005). In 1973, the Karmel Report on *Schools in Australia* endorsed the right of a child to integration and regular class placements. This report created several significant changes such as a more systematic "special" education provision by the NSW Department of Education in 1974 and the allocation of Commonwealth funding to government and private schools for integration purposes (Forlin, 2006). Sharing similar cultural roots under the British Empire, the United States and the United Kingdom bear significant influence on Australian education policymaking. In 1978, the release of the Individuals with Disabilities Education Act in the US and the Warnock Report in the UK prompted increased societal acceptance of the disabled together with the implementation of integration policy on a larger scale across different states (Carroll, Forlin, & Jobling, 2003; Graham & Jahnukainen, 2011; Safran, 2001).

The following decade witnessed a growing integration policy discourse. The Doherty Report in 1982 emphasised the right of a child to a full and appropriate education. It was followed by the Special Education Policy in 1988 which pronounced that "educational placements for students with disabilities in the regular neighbourhood school where this is possible and practicable and in the best interests of the student" (McRae, 1996, p. 19). The NSW Disability Services Act in 1993 further promoted the need to "move from the provision of predominantly segregated educational settings" (NSW DSE, 1993, p. 4) in line with the endorsement of UNESCO's 1994 Salamanca Statement.

The department has been a strong proponent of "A Fair Go for All" as early as 1996 by targeting "resource provision to groups and areas of greatest need" (DET, 1996, p. 24) so that children have equal learning opportunities irrespective of their

cultural background, ethnic groups and ability levels. The Disadvantaged Schools Program which commenced in 1973 and ended in 1997 was "the most concrete manifestation of the [Whitlam] Commonwealth government's commitment to equality in Australia", targeting and supporting schools identified as socioeconomically disadvantaged (Johnston, 1993, p. 106). After its dissolution in 1997, the NSW liberal government was the only education system that did not completely disband equity-based funding although it is also currently in the process of dismantlement (Sweller, Graham & Van Bergen, 2012).

4.2.1 Education Governance and the Schooling Structure

Australia practices a system of parliamentary democracy with a federal political structure. Schooling is not included in Section 51 of the Australian Constitution and thus is a residual power of the States and Territory. Each State and Territory has a minister and department responsible for education policy, programs, funding, curriculum and assessment (DEEWR, 2008). Federalism has enabled policy diversity and innovative measures across different states, resulting in considerable variation in student support structures (CAF, 2007; Forlin, 2001). Federal financial relations with the states are stipulated under the Intergovernmental Agreement which lays down the foundations for joint collaboration and implementation of crucial national socio-economic policies and service provision. Public education is however centrally administered by the state authorities and collaborative ties have been established between states, territories and the Commonwealth since the 1989 Hobart Declaration to regulate agreed national goals for schooling. In the Department of Education and Communities (DEC) in NSW, the Access and Equity portfolio constitutes Student Welfare, Disability Programs, Equity Programs/ Distance Education, Aboriginal Education and Training and Early Childhood and Interagency Programs. Education provision is shared between comprehensive and selective government schools, as well as the private sector such as the Catholic and independent schools (DEEWR, 2008).

In 2012, of over 1.1 million K-12 schooling population in New South Wales, student enrolment in state schools has shrunk to 67% (760741 students) with the rapid expansion of non-government schools (NSW DEC, 2012c). 18% of the whole school age cohort attends Catholic schools followed by more than 15% in the independent

schools (Australian Schools Directory, 2012). Independent schools vary in the mission of establishment, fee structures and amounts charged; and thus service a wide range of communities from low to higher socioeconomic groups (Australian Government, 2010). The DEC regulates the operation of the NSW government school system which consists of six years of K-6 elementary schooling and another six years of 7-12 secondary schooling. The Education Act 1990 enforces compulsory schooling until age 15 but the Education Amendment Act 2009 has lifted the minimum school-leaving age to 17.

Since 2008, NSW government has carried out the annual statewide National Assessment Program - Literacy and Numeracy (NAPLAN) which all students in Years 3, 5, 7 and 9 are obliged to participate to drive up standards, set benchmark target and enable interstate comparison. While NAPLAN is designed for instructional improvement without intended consequences on students (ACARA, 2012), the opportunity class placement and selective high schools tests have instilled competition to screen for "the cream of the crop" for elite government schools. The NSW Higher School Certificate examination which is taken at the end of year 12 for university entrance combines HSC results with accumulative subject scores. In comparison, the Malaysian education system contains much more strenuous, high-stakes and purely summative examinations which include at least 5 or 7 subjects in national and national-type primary schools that ascends rapidly to 8 subjects in Year 9 and 10 subjects in Year 11, and all entail ability streaming and selection.

4.2.2 The Political Context and International Scene

Since the 1980s, policy structures throughout Australia have been strongly affected by neo-liberal market theory, notably in NSW. After the enactment of the 1992 National Competition Policy, a sustained withdrawal of the state from service provision has taken place to encourage private sector growth for enhanced economic competitiveness (Van Gramberg & Bassett, 2005). The concept of managerialism extends to the education sector which has seen a massive expansion of private school markets replacing the traditional educational communities and even government schools are granted increased decision-making power in staffing and budgeting (Dimmock & Bain, 1991). The growth of the private education sector is directly

linked with the enabling policy support and annual subsidy increment given by the federal government. The ability of the upper-income family to purchase a quality education aggravates inequality and social injustice between privileged and disadvantaged communities.

The Australian government system is influenced by economic liberalism based on the concept of welfare capitalism, market dominance and private provision (Esping-Andersen, 1990). By the end of 1980s, Australia had transformed into one of the most economically liberal OECD countries from its previous purely interventionist model (Henderson, 1989; 1995); and was swept by financial deregulation that altered "a highly repressed financial system into one of the world's freest in the space of eight months" (Institute of International Finance 1990, p. 10). Kelly (1992) portrays the 1980s as the start of a neo-liberal era in Australia with widening income discrepancy and growing affluence of those from higher socio-economic groups. This combined capitalist economic and welfare model leads to the distribution of less comprehensive cash benefits compared to the United Kingdom and the Nordic countries (Castles, 1994; Stebbing & Spies-Butcher, 2010). Only 14% of Australian annual income is dispensed as welfare benefits relative to the OECD average of 22% (OECD, 2008a).

In the period of 1998-2003, NSW experienced the largest reduction of welfare spending of any Australian States and Territories with the smallest amount granted to the elderly and people with disabilities (NCOSS, 2005). The Commonwealth could not impose but could strongly incentivise state actions, such as establishes nationally agreed approaches for the Parties to work together. As the federal government constricts policy steering space of individual states including NSW, which has recently intensified with the movement of introducing a national curriculum and standards unification, the effect of federal imposition on local state policies is discussed throughout the chapter. The whole nation is currently engrossed with minimum benchmark and high standards especially following the competitive ranking of PISA.

4.2.3 Participation in International Student Assessments

Australian students have consistently performed well above the OECD median score in all assessment domains of PISA. Nevertheless, it was the only high performing country in PISA 2009 to experience a significant slip in reading literacy down to the 9th position with an achievement gap wider than the OECD average (Thomson et al., 2010). The slope which shows the impact caused by the ESCS index (economic, social and cultural status) of students on literacy performance is moderately steep in Australia. This situates Australia in the quadrant of high quality but 13% of overall performance variance and 70% of between-school differences are attributable to the students' socioeconomic background. While Hong Kong, Finland and Canada exemplify excellent performance and high equity, Australian children with a higher socio-economic status are two to three years ahead of low SES students in reading proficiency (Thomson et al., 2010).

NSW has the highest student and school participation rate which produces data of the highest validity. In PISA 2009, NSW was ranked behind Australian Capital Territories, Western Australia and Queensland in reading and mathematical domains; moreover had among the largest gap between the lowest- and highest-achieving students at the 5th and 95th percentiles scale points out of 8 Australian states and territories (4th largest gap in reading and mathematical literacy; 2nd in science). The proportion of underperforming students in score bands below level 2 for reading literacy has increased by 4% from PISA 2000 to 2009 and the three aforementioned Australian jurisdictions also outperform NSW among students from the highest level of socioeconomic background (Thomson et al., 2010). Around 31% of disadvantaged Australian 15-year-olds perform in the top quarter across students from all countries, which is equivalent to the OECD average but far behind China, Korea, Singapore, Finland and Canada (CAF, 2007; OECD, 2010a). In addition, 25% of early school-leavers come from 5% of disadvantaged postcodes areas (Bond, 2009). Analysis at the macro level further shows that Aboriginal and students with a disability largely perform below national standards in schools. All Australian States and Territories face similar problems of unsatisfactory school attendance and lower academic achievement among their Indigenous students. In NSW, as many as 20% of Year 9 Indigenous students in 2011 were absent from schools, which accentuated the already

high 20% failure rates of Aboriginal students who sat for the Year 9 NAPLAN numeracy assessment (Hughes & Hughes, 2012).

NSW's consistent ranking slippage in all three domains between 2000 and 2009 as well as the declining percentage rate of upper level PISA performance, which is much faster than the expanding tail, have generated serious concerns (COAG Reform Council, 2011)[2]. McGaw (2010a) interprets this as a result of more attention being given to minimum achievement levels than advanced reading skills in schools. The ascending position and performance of other Asian players, such as Korea and Shanghai since their first participation in PISA in 2006 and 2009 respectively, pose a threat to Australian economic sustenance in the Asia Pacific labour market. Sifting through annual reports published by the NSW government from 1996 to 2011, while the priority of improving literacy and numeracy standards has been at the forefront since the 1990s (DET, 1996;98), a noticeable shift is observed from the general goal of improving educational standards for all students to more recent specification of targeted outcomes in percentage numbers. Although "high expectations" and "closing the gaps" are both targeted goals of the NSW policymakers (DET, 2011, p. 8), the focus on expanding the top two achievement bands for literacy and numeracy through NAPLAN is apparent, with the aim of securing 10% of total student population in those bands by 2012 and 12% by 2016 (DET, 2007; 2009; 2010).

4.2.4 Conclusion

This macro background establishes basic understanding of the broader political, socio-economic and educational context in New South Wales. The following meso and micro levels build on this understanding to explicate the relationship between the national and educational context, student support provision and the discourses of inclusion and neo-liberalism.

4.3 The Meso Level – Policy Development

This section presents the analysis of the NSW policy library. Education policy documents are first examined chronologically and then thematically to derive the

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[2] Refer to section 8.6A) in chapter 8 for exact figures

significant discursive trends in the education system. The analysis first looks into the shifts in the purpose and priority of education and funding pattern in NSW over time. After that, changes in the concept of inclusion in NSW are discussed prior to examining the development of legislation related to student support services. As this research focuses on dominant discourses influencing education policy decision-making, the analysis will show how the concept of inclusion is driving special educational change. This analysis will then be weighed with the examination of neo-liberal discourses in policy documents in order to determine which discourse has a more significant impact in the NSW education context.

4.3.1 The Purpose of Education

The analysis of educational goals is to be able to assist in the understanding of the core tenets influencing decision-making and policy changes. The Adelaide Declaration on the National Goals for Schooling in the 21st Century in 1999 is one of the most prominent documents that spells out the common and agreed educational objectives of the Commonwealth, states and territories (Van Kraayenoord, 2007). The Declaration emphasises that "schooling should be socially just" (MCEECDYA, 2009) and equally important is the development of a civic-minded young generation who acquire marketable technological skills (DEEWR, 2008). The importance given to social justice is also reflected in the NSW Charter for Education and Training which lays out education as "the foundation of an informed and just society, the key to overcoming social inequalities" (NSW DET, 2004, preamble).

While this social justice approach serves as a means to realise inclusive education, the 2007 review of the Declaration has adopted the "fair go" approach to ensure that children from disadvantaged backgrounds and Indigenous groups attain required benchmark standards to secure Australia's future economic competitiveness and prosperity (CAF, 2007). The focus has slightly shifted to delivering equitable educational opportunity so that all children can be adequately prepared to contribute economically to the nation in the labour market. The Strategic Initiatives for Public Schools of NSW released in 1999 also stresses the need to "give everyone a fair go" but with a more strategic accountability framework based on "system-wide planning,

monitoring and reporting" to enhance the work of schools (MCEECDYA, 1999, p. 16).

NSW has also signed the 2008 Melbourne Declaration on the goals of education. This new Declaration is influenced to a large extent by the PISA results and aims to resolve the disproportionality of minority students from disadvantaged social background or with an identified disability in the lower achievement bands (Bond, 2009). It has a strong focus on equity to "ensure that socioeconomic disadvantage ceases to be a significant determinant of educational outcomes" and "promote personalised learning that aims to fulfil the diverse capabilities of each young Australian" (MCEETYA, 2008, p. 7). The primary purposes of education stated by the NSW government have fused the priority of inclusion with the need for economic stability in contemporary society.

4.3.2 Important Concepts in NSW Legislation

With reference to the DEC Disability Criteria (NSW DET, 2012a), "students with disabilities" include those with a diagnosed intellectual disability, vision disability, hearing disability, physical disability and psychological disability/mental health (emotional disorder, behavioural disorder, autism spectrum disorders). The NSW DEC reduced the initial seven disability categories (McRae, 1996) to five by merging three subjective conditions of behaviour disorder, conduct disorder and emotional disturbance under psychological disability (Graham & Jahnukainen, 2011). Students identified under these categories could be placed in special schools and classes or in regular classrooms under the Integration Funding Support. While many countries have replaced the term "disability" with "special needs" since the 1978 Warnock Report, NSW has retained the disability model to facilitate the diagnostic procedure of determining students with the most significant need for access to additional funding support through the Disability Program. Students with "special needs" in the NSW context require instructional support due to certain behaviour disorder and/or learning difficulties but do not meet the formal disability criteria (NSW DET, 2012b; GPSC2, 2010), and they can be supported through *Every Student, Every School* or other welfare services.

In agreement with the Salamanca Statement, inclusion discourse in DEC policy statements has grown to cater for the learning needs of diverse students (Dixon & Verenikina, 2007). The Government's Special Education Initiative defines inclusion in terms of "addressing the specific support needs" and "meeting the challenges of personalised learning" (AONSW, 2006, p. 7). The philosophy of inclusion has also underpinned several funding policy changes and educational provision[3] in NSW but there remains a policy/practice divide due to implementation barriers[4]. Graham and Jahnukainen (2011) observe the shifting discourses in NSW policy documents which recently readopted "integration" and "responses to diversity" in place of "inclusion". These changes reveal that the discourse of integration is more prominent in the NSW policy space although a continuum of placement options is maintained to cater for parental choice to safeguard "the right schooling option for your child, taking into account your choice, your child's specific additional learning and support needs and proximity to local specialist services" (NSW DEC, 2012e).

4.3.3 Legislation and Development of Student Support Provisions

Following the NSW Education Act 1990 which highlighted school diversity and educational equality, the Board of Studies had put forward a universal curriculum and abolished the previous specialised curriculum which marginalised students with disabilities. The reliance on teachers' abilities to modify curriculum content for individualised learning was a positive step towards inclusion (GPSC2, 2010). This responsibility was strengthened through the Commonwealth Disability Discrimination Act 1992 which imposed legal duties on schools to make "reasonable accommodation" for students with a disability (CoA, 2002, p. 23). Although these Acts provide a framework to support equality of treatment for students with disabilities, the wide implementation leeway, ambiguous standards and loose policy accountability create a big loophole for segregative placements (NCIS, 2002). Despite the appeal for inclusive public education and equitable distribution of educational resources in the 1996 McRae Integration/ Inclusion/ Feasibility Study, structural barriers that inhibit meaningful participation of students with disabilities in mainstream learning remain (Connaughton, 1996; CoA, 2002).

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[3] Refer to Section 4.3.4 on funding allocations
[4] Refer to Section 4.3.5 on enrolment trends

The segregated support system has been maintained through special schools and support classes in mainstream schools. This system continues the long-practised medical approach to diagnosing suspected physical, intellectual and socio-emotional deficiencies of a student to determine eligibility for educational support against the DEC Disability Criteria. The differentiation of support classes catering for students with specific types of disabilities is a further reflection of medical classification, ranging from three distinct levels of intellectual disability (mild, moderate and severe) to physical, visual, hearing, reading, language and emotional disabilities. While the admission of children with "special" needs into mainstream schools remains restricted, more power has been handed to the Director-General in transferring students with "potential and/or demonstrated violent behaviour" to segregated settings (NSW DET, 2010b, p. 1; Graham & Jahnukainen, 2011).

Although integrated placements in special classes have risen, students with disabilities still experience prejudice and social exclusion in mainstream schools (Lindsay, 2004; UNESCO, 2001; Vinson, 2002). The NSW government stepped up its effort to overcome these obstacles by introducing the Integration Funding Support for students with a disability to join their peers in mainstream classrooms while the recently abolished Learning Assistance Program (LAP) drew in annual federal grants to fund the provision of additional support to students with learning difficulties without the requirement of a confirmed medical disability (NSW DET, 2006; NSW Government, 2011b). The School Learning Support Team was established to provide support at the school level through collaborative planning (GPSC2, 2010). The Smarter Schools National Partnerships also work towards the same goal by targeting 27% of NSW schools for systematic innovation of in-school learning support and teachers' professional development to gain improved outcomes for Aboriginal and low SES students (Australian Government, 2011; NSW DET, 2010a).

Individualised targeted provision for students with mental health disorders has experienced a triple growth in NSW since 2003, a policymaker from the Office of the Director-General (N1) voiced his concern that the categorical funding system created perverse incentives for schools to over-identify children with a disability for extra funds. A new trial called *Every student, Every School* has been implemented in 2012 in response to such concerns by replacing the practice of medical diagnosis with a functional assessment tool for evaluating and documenting students' needs in various

school-related practical tasks (NSW DEC, 2012b). It is a bold step taken to revamp the previous medical diagnostic categories in substitution with a more flexible form of support allocation that employs a broader, individualised and holistic approach to learning needs covering communication, writing, reading and socio-emotional aspects. The intensified focus on professional teacher training and the supply of more specialist teachers as well as teacher aides to over 400 schools across NSW are aimed at improving the education of children with disabilities in regular schools to fulfil the Commonwealth Disability Standards for Education 2005. Making specialist teacher available in schools is conducive to the development of inclusive education as an easily accessible and useful source of pedagogic advice, consultation and collaborative teaching to the benefit of regular classroom teachers and students.

Besides reducing bureaucracy and enhancing school-level efficiency, students who previously failed to meet the compartmentalised disability criteria could benefit from the allocation of support based on needs without a medical diagnosis. This new Learning and Support Framework lays down a specific funding threshold, which brings into effect the continuation of Integration Funding Support for students with moderate, high or complex learning and support needs, but halts any individual-targeted provision to students whose lower level of needs qualify for less than $6000 in education support. This new funding mechanism involves the distribution of a lump sum from the state education budget, along with a smaller portion by the Commonwealth, to individual schools. Schools are entrusted with the autonomy to decide where, to whom and how general funds should be apportioned, through accountability based on professional trust of principals and the school learning support team.

The government disburses more funds for schools which are located in a community with higher prevalence of disabilities as well as those at the bottom 10% of NAPLAN ranking in students' learning outcomes. This new funding formula has resulted in a change of the amount each school receives, which could be an increase of financial assistance to small schools in rural localities while larger schools might see a reduction. Some initial complaints have been forwarded by parents and teachers on independent forums about the loss of valuable aides for children with lower level needs (Forbes, 2012). As with every new implementation, unforeseen reactions could occur and adjustments are required for improvement. While the effects and

development remain to be seen with many other contextual factors at play, this new model of support shows an attempt to counter the proliferation of medical diagnoses at schools, provide school-level support through specialist staff and respond to the functional needs of students more effectively.

4.3.4 Funding Allocations and Targeted Areas

Australia's public spending on education was recorded at 5.2% of GDP in 2011. Financial resources for public schools remain low and ranks 26th out of 27 OECD countries in the distribution of government funding towards public education (Graham, 2007a). Education support for students with additional needs is undeniably one of the priority areas of the DEC as there has been a 261% increase in NSW "special" education expenditure from $471million in 2000/01 to $1.7 billion in 2011/2012 (NSW DEC, 2012d; NSW Government, 2011b). Such spending commitment to social care reflects a left-leaning NSW liberal party.

Figure 4.1: Historical trend in annual enrolment of students with a confirmed disability (receiving support through the Integration Funding Support program, Learning Assistance Program, or specialist support classes)
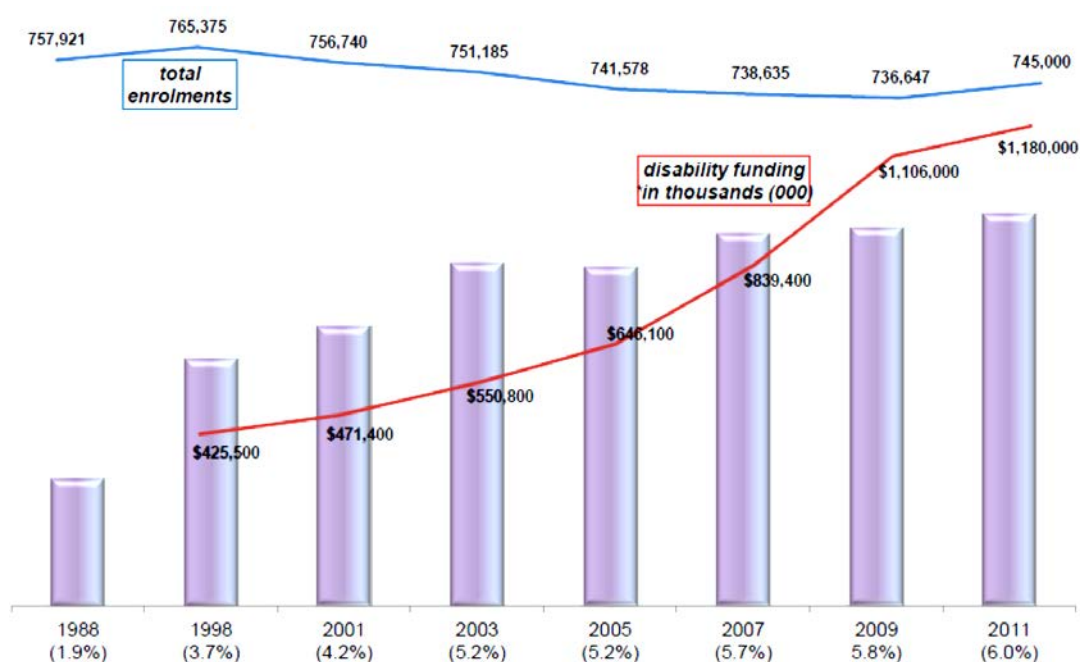
Source: NSW Government, 2011a, p. 2

Official statistics from the DEC are used in the making of the figure above which illustrates rising trends of disability funding and student enrolment percentage in public support services[5]. Over 23 years, changes in eligibility criteria and reporting practices have contributed to such a development. The DEC shows considerable support to promote inclusion based on its two funding policies – the Integration Funding Support and the Learning Assistance Program which just ended in 2012. Funding Support was known as the State Integration Funding before 2000 which has financed education provision of children diagnosed with a disability in regular classes since the mid 90s (Parkins, 2002). Budget allocation for Funding Support has increased by 650% between 1996 and 2002, which indicates a huge rise in disability diagnosis taking place in mainstream schools.

Differing from the Integration Funding Support program, which utilises these impairment classifications for individually targeted funding (NSW DET, 2000), the Learning Assistance Program launched in 2004 distributes resources using a census-based formula to assist children with low support needs in basic areas of learning (GPSC2, 2010). This model complies with the inclusive principles as the determination of support requirement lies with the school learning support team for collaborative planning of school-level student support without involving diagnostic procedures or medical categorisation. Due to its lack of success, the government has replaced LAP with *Every Student, Every School* which is detailed in the preceding section. Nevertheless, government funding of special schools and support classes still employ the categorical approach based on the degree of disability.

Aside from channeling funds into disability programs, the NSW government attempts to improve academic and engagement outcomes of students in low SES schools through the Priority Action Schools Scheme. On the other hand, the non-recurrent funding of the Indigenous Education Programs has constrained effective support provision as non-governmental agencies are relied upon instead for the educational subsistence of the Aboriginal students (Bond, 2009). Under the National Partnerships as well, many of the listed equity programs are launched on a temporary basis without guaranteed continuation of support for the targeted students (NSW DEC, 2011). As a whole, the special education budget along with other equity

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[5] Graham & Jahnukainen (2011) and Graham & Sweller (2011) found students with a confirmed disability constituting 6.7% of total student population in 2007. The DEC underreported their figures to the inquiry by excluding students in behaviour schools.

programs have been unable to completely cover the required expenses to sustain full participation of students with additional support needs in the education system (GPSC2, 2010; Ralston, 2009).

Essentially, given that the directorate has to weigh up economies of scale as with appropriate budgeting, the schooling system requires more effective use of government resources as 95% of Funding Support is spent on teacher aides (Vinson Report, Graham & Sweller, 2011). This reflects a disproportionate usage of available funds as other essential areas are widely reported to be lacking fundamental resources, such as the inadequate provision of curriculum and integrated support in mainstream classrooms, facilities and subject specific teaching staffs, professional services and school counsellors (McBride, 2010). While learning support is one of the components of the productivity and social inclusion agenda in the Council of Australian Government, the private education sector and school performance assessment receive a much larger proportion of federal allocation (Butland, 2011). While NSW Government has consistently allocated 7-8% of its annual education budget to non-government schools, public schools still receive the remaining 92.7% bulk (Australian Government, 2010; Productivity Commission, 2005).

The SES funding model, in place since 2001 until the end of 2012, funds non-government schools in rates ranging from 13.7 to 70% of the average government school recurrent costs (AGSRC) based on their score on the socioeconomic scale (Harrington, 2011). Significant increases in this Commonwealth funding to non-government schools do not correspond with the substantial rise of tuition fees in some of the most prestigious private schools in New South Wales, which shows an unsuccessful effort to make those schools more inclusive and accessible to more parent consumers (Exfin International, 2012). The excess of funds in those private schools coming from costly fees and federal allocation enables salary increment for their teachers and improvement of educational services which further strengthens the phenomenon of quality education for students from higher socio-economic groups. In recent years, even Catholic schools have become unaffordable although relatively much lower in fee than the independent schools (Price, 2007). At the national level, the recent green light given to Gonski's school funding proposition by the Australian Prime Minister, Julia Gillard, signals a clear commitment to channelling resources based on student's needs.

Under the new National Plan for School Improvement, on top of the benchmark funding allocated for every student based on the new Schooling Resource Standard (SRS), additional loading is applied to schools which are large or situated in rural areas as well as those with students from Indigenous groups, lower socio-economic status and/or with weak English proficiency (Australian Government, 2012). Private schools continue to receive a portion of the full SRS depending on their revenue growth and the Gillard government has lately announced an annual 5% increase of Commonwealth grants (Taylor, 2012). The overhaul of the funding system would occur as the SES model expires but full transition will only be finalised in 2020, so the state of affairs is laden with uncertainty. The extra financial input to students with additional support needs is an urgent measure to remedy the widening achievement gap in Australia and its international standing in PISA. "To win the economic race, we must first win the education race" (Johnston & Marszalek, 2012, paragraph 15), the government has thus renewed their commitment to provide personalised learning and additional support to individual students in the strive for excellence as a top five world-class education system in literacy, numeracy and science by 2025 (Ferrari, 2012).

4.3.5 Enrolment Trends

Funding increase to education support goes hand in hand with the escalating disability diagnosis and special education enrolment. Over the last 14 years, official statistics by the government have revealed a significant 62% growth in the percentage of students receiving support provisions from the Disability Program of NSW from 3.7% in 1998 to 6.0% in 2011 (NSW Government, 2011a). The movement towards the integration of students with a disability commenced in the 1970s and led to a dramatic increase in the enrolment of students with a disability in state-run mainstream schools (Andrews, Elkins, Berry & Burge, 1979). When the enrolment in government special schools dropped by 30% in the period from 1986 to 1994 (Dempsey & Foreman, 1997; Graham & Sweller, 2011), it was possible to believe that the call for educational placements in regular neighbourhood schools by the 1988 Special Education Policy and the 1993 NSW Disability Services Act had paid off. However, McRae (1996) reported that "surrogate" special schools (p. 23) in the form of segregated support classes in regular schools have mushroomed since 1986 which more accurately

explain the initial decline of special school enrolment. Although integration has occurred, inclusion has not.

Table 4.1: Percentage of student enrolment in NSW public support services

% of Total Enrolment	2005	2006	2007	2008	2009	2010	2011
Special School	0.56	0.56	0.58	0.60	0.61	0.63	0.64
Special Class	1.69	1.66	1.67	1.75	1.86	1.93	1.96
Integration Funding Support	1.50	1.66	1.8	1.93	2.05	2.09	2.13
Total enrolment	741,578.3	740,415	738,635.7	735,779	736,647	742,141	745,540.2

Source: NSW Government, 2011a, p. 5, NSW Government, 2005-2011

Figure 4.2: Enrolment percentage of students with a confirmed disability in different educational settings within NSW government schools, 2005 – 2011
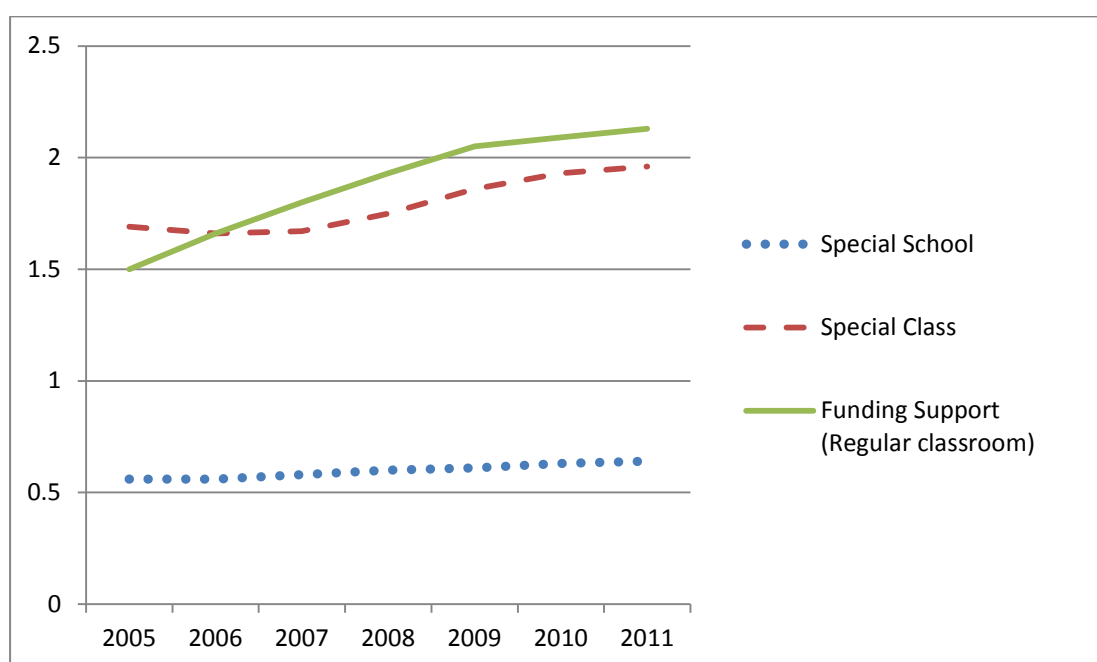
The downward trend of special school enrolments has taken a turn since 1999 and has gradually climbed up to 0.6% of total student population. This figure has been rather stable since 2005 and constitutes 14% of the special education student cohort in 2011. Graham and Sweller (2011) elaborate that the increase occurred despite a 3.5%

decrease in government school enrolments during the 1997-2007 period. As shown in the graph above, support class placements and funding support provision in regular classes have also been escalating at an even higher rate. Students with social and emotional disorders have disproportionately occupied the expanding support classes, while special schools are increasingly taking in students identified with behavioural problems (Graham & Sweller, 2011). This trend reveals stratification and accumulation of students based on the types of disabilities in certain settings, with behavioural disruption being the most unacceptable in mainstream schools, while the number of students with visual, hearing and physical impairments has not fluctuated much over the years.

The Learning Assistance Program (LAP) introduced in 2004 has also failed to serve its purpose of reducing disability diagnosis through in-school remedial support. Statistics show that disability funding climbs up after 2004 while the use of LAP concurrently goes down (Graham & Jahnukainen, 2011). The categorical funding mechanism has acted as a voucher system which reinforces the cargo cult mentality that drives diagnosis in schools (Graham & Jahnukainen, 2011; Graham & Sweller, 2011). Even more unsettling is the noticeable climb seen in the enrolment rate of students over the period of ten years in the categories of behaviour disorder which has grown by 585%, followed by emotional disturbance (348%) and autism (280%) (Graham & Sweller, 2011). In fact, there has not been an influx of segregated children into support classes and regular classrooms but the reversal; representing a backward step from the goal of integration and inclusion. At present, a functional assessment tool is under trial which involves teachers working with parents to profile a child based on 46 items in order to understand his or her needs as well as the overall impact a particular issue has on daily learning. Clearer specification of assessment criteria also compensates for the many non-normative or objective medical categories of the previous LAP model and the detachment of mild support requirements and funding has the potential to curb the trend of overdiagnosis.

4.3.6 Reflecting on Policy Development

The government's measures to promote inclusion have met with limited success as opposed to the mounting motivation to diagnose and segregate students with

additional support needs. The provision of individually targeted funding has acted as an incentive to pin a disability category on students with learning difficulties. Instead of improving individualised support through an inclusive school culture, the growth in the demand of support classes indicates a strong preference to withdraw students from the regular classroom, especially those who experience emotional or behavioural difficulties. Even though Australia has adopted the Salamanca Statement, the emphasis on inclusion has taken a back seat as the 2006 performance audit reveals that the NSW government has not expressed a lucid stance in clarifying "the relative merits of enrolment in a regular class versus enrolment in a special class" (AONSW, 2006, p. 9). The retrospective medical approach still prevails over the educational model within a specialist disability service system, although the support framework underlined by *Every Student, Every School* (NSW DEC, 2012b) could reduce the dependence on medical assessments and further the previous initiatives of the Learning Assistance Program. NSW still lacks a preventative framework to effectively meet the support needs of children in mainstream classrooms for "the best interests of the child" (Dempsey, Foreman & Jenkinson, 2002; NSW DOE, 1988, p. 19).

4.3.7 Neo-liberal Influence

While the aim of inclusion is to eradicate social exclusion within the education system, the global neo-liberal agenda anchored in the principles of the free market and competition has influenced the Australian context since the 1980s. The link between education and economic prosperity has grown stronger than ever in Australia along with the importance of equipping the young generation with marketable skills to "reap the benefits of globalisation" (CAF, 2007, p. 6). In NSW, educational strategies have been modified to develop a globally competitive human capital which is capable of "meeting the challenges of the changing nature of work and future skill needs" (AR2000, p. 11). The NSW government aims to achieve this goal by means of reinforcing accountability measures in education through "developing performance and student-based allocation and reporting systems" (DET, 1998, p. 89), as well as monitoring "students' performance, and reporting on education and training outcome to students, parents and the community" (DET, 1999, p. 20).

The use of results-based governance is evident through performance-based provision and reporting to the parent-clients which has intensified since 2000 with funding being directed for "major enhancements relating to increased testing and performance measurement" (DET, 2000, p. 15). Students also face greater pressure to conform to "a standards framework of skills bands" from as early as 1997 (DET, p. 5) through the specified "subject course performance descriptors" (DET, 1998, p. 97). In the Annual Report 2010, the department asserted the significance of "valuable performance data [that] informs future policy and programs" (DET, 2010, p. 23).

a) High-stakes Assessment and Streaming

NSW has the longest history of large cohort testing among the educational jurisdictions across Australia, starting from the introduction of the Basic Skills Tests in 1989. From the initial goal of evaluating students' learning outcomes, standard-setting examinations have since expanded to cover a wider range of skills, grades and domains which are scaled against a national benchmark to hold students and teachers accountable for each state's academic performance. As a federal initiative, the emphasis on literacy and numeracy benchmarks in the National Assessment Program – Literacy and Numeracy (NAPLAN), with the comparison of like-schools results on the My School website, has contributed to increasingly heavy academic demands and superficial learning in schools (Polesel, Dulfer & Turnbull, 2012).

Along with increased media coverage, My School has inadvertently become a resource for parental reference to compare performances when choosing schools. Lingard (2010, p.130) also underlines possible risk of the "potential for the 'naming' and 'shaming' of poorly performing schools, which most likely will be situated in poor communities and which would fail to recognise the very strong relationship between socioeconomic status (SES) and student performance". The dominant neo-liberal approach to public administration at the national level has to a large extent restricted the "manoeuvring space available to local states" (Broomhill, 2011, p. 137). Educational governance has shifted from the monitoring of input to a strong evaluation framework which uses performance data to inform future policy and programs (DET, 1998 – 2010; DSE, 1997).

The reporting of student performance at individual, school, regional and state levels has pitted students and schools against each other in competition for academic recognition and led to the accentuation of between-school differences (Lingard, 2010). The practice of high-stakes national testing in years 3, 5, 7 and 9 and the comparison of like schools are argued to be futile in providing reliable information for instructional improvement. Information concluded from such aggregate level data to compare schools that are categorised under the same profile of low or high socioeconomic status is misleading as they are very dissimilar in terms of student population, locality and culture (McGaw, 2010b). Even though value-added components such as relative effective indicators of similar schools are incorporated into the performance analysis of NAPLAN through the use of an Index of Socio-educational Advantage (ICSEA), inclusive strategies and culture are not evaluated as part of the essentials of school effectiveness. Academic performance remains the central emphasis. Under the intense pressure of school comparison, the indignity of unachieved standards, low ranking and school ineffectiveness are degradingly associated with low-performing students who have additional needs or from disadvantaged background (Lingard, 2010).

b) School-choice Policies

The neo-liberal market theory proposes the removal of state intervention and regulation for unencumbered private sector participation to improve system performance. Along with the increased parental demand for Catholic schools and better quality education, this strategy has been taken up in NSW since the mid-1970s by directing state and federal funds to non-government schools (Hogan, 1984). The era of comprehensive schools with strong social and ethnic integration through the 60s and 70s has given way to an exponential growth of private sector enrolment since 1978 (Campbell & Sherrington, 2003; Kalantsiz & Cope, 1992). Australia currently has the highest percentage of school-aged students (34%) enrolled in private schools among all OECD countries (Graham & Jahnukainen, 2011; Keating & Lamb, 2004). McGaw (2004) also highlights that the funding system which considerably subsidises private schools while fully financing state government schools is unique only to this country. Government-funded private providers now account for more than a third of NSW schools which include "low-fee Christian schools, ethno-linguistic schools,

Catholic schools, as well as high-fee selective schools, against which public schools must now compete" (Vickers, 2004, p. 13).

The Howard government (1996-2007) introduced the SES funding formula which saw an increase in Commonwealth allocation to non-government schools. Australia's current centre-right political climate is evidenced by the generous funding support to non-government schools which amounts to two-thirds of Commonwealth Government funding in the federal budget 2010/11 (Devereaux, 2007; Graham, 2007a). The inequitable budget allocation is inconsistent with the higher funding needs of public schools which educate around 67% of the nation's children (Bonnor & Caro, 2007). The recurrent and growing financial support given to independent schools since 2001 based on the SES funding model shows unwavering federal endorsement of neo-liberal private economy. It is stipulated that the annual subsidy received by those schools must be equivalent to or above their socioeconomic status rate calculated from the mean residential demographics of the enrolled students (OECD, 2010a). As elaborated in the funding allocation section previously, many equity projects undertaken in the National Partnerships are not guaranteed continued funding.

Nevertheless, this contrasts with the differing priorities of the NSW government which disburses 92.7% of its annual education budget to public schools. While government schools face high levels of accountability pressure, huge amounts of public funding have been given to autonomous private schools with no accountability strings attached and no obligation to report spending efficiency and outcomes (Butland, 2011; NSW Government, 2011a). Only a low amount of Commonwealth government assistance is given to privately enrolled students with a disability which acts as a major disincentive for private schools to admit those students, which has contributed to the larger percentage of students with a disability (76.8%/ 90,000) who are enrolled in government schools (Butland, 2011; DEEWR, 2006; NSW Government, 2011a). The NSW private education sector has attracted students from higher socio-economic groups which leaves those who lack the financial means settling for public schools.

Nonetheless, comprehensive schooling has been threatened by the state government's decision to expand the exclusive academically selective high schools

and opportunity classes[6]. Competition and differentiation are strengthened by pooling "highly-achieving, academically talented students" into the present 46 fully and partially selective high schools (NSW DEC, 2012d). While the state's endorsement of academic selectivity and premium school placements have further residualised government comprehensive schools (Sweller, Graham & Van Bergen, 2012), the federal decision to financially support and politically promotes the establishment of school markets has brought about the segregatory effect of education commercialism where higher SES students are able to pay for private education while children from poor families and with a disability have no choice but to attend their local government school.

4.3.8 Conclusion

The growing trend of school marketisation in NSW compounds social distinction and creates "a hierarchy of prestige" among high-fee non-government schools and inadequately resourced public schools in disadvantaged neighbourhoods (Vickers, 2004, p. 19). Schools are further marketed to parents through the publication of state-wide testing results which dichotomise high- and low-ranking schools (AEU, 2010). The adverse effects of these neo-liberal measures, which were introduced by the former centre-left learning Labor government, are evident as student's socioeconomic background is a significant factor of PISA performance[7]. While the future of inclusion is uncertain, the continued support of educational liberalisation, marketisation and competition appear to already have a strong foothold in the NSW.

4.4 The Micro Level: Interview Discourses

The following micro level analysis readdresses the influence of inclusion and neo-liberal agendas which have been analysed in the meso level. The contextual data which were elaborated in the macro level provides the groundwork for readers to understand the issues in the subsequent levels. The issues are also discussed at the policy-making level through the voice of NSW policymakers. As the data in this final

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[6] Opportunity Classes are established throughout NSW for academically gifted and talented primary school children in Years 5 and 6.

[7] Refer to section 4.2.3 on PISA

level is based on individual perspectives of five policymakers (as shown in the table below), different reactions and feedback to the current educational practices and student support design are able to enrich the dialogue on influential discourses. Interpretation of the discourses is also made to relate the data to the research questions.

Table 4.2 NSW interview participants profile

Date	Participant Codes	Organization	Unit	Interview Duration
18th October 2010	N1	Department of Education and Training	Office of the Director-General	90 minutes
22nd October 2010	N2	Department of Education and Training	Disability Programs Directorate	117 minutes
28th October 2010	N3	Department of Education and Training	Disability Programs Directorate	100 minutes
11th November 2010	N4	Department of Education and Training	Planning and Innovation	97 minutes
17th November 2010	N5	Department of Education and Training	Student Engagement, Evaluation Bureau	80 minutes

4.4.1 The Medical Dominance: Disability as the main benchmark for student support

The most prominent theme emerging from the interview data is the medical model of disability. As the word "disability" was frequently used in connection with the word "diagnose", this combination reflects the general practice of diagnostic evaluation based on the NSW disability criteria for resource allocation to students requiring additional support. N1 elaborated that the individualised funding support mechanism is predicated on a diagnosis to profile a child's primary needs in one of the five eligible disability criteria. While the identification of students with complex and moderate support needs for individually targeted financial support has been sustained, recent policy change following the publication of *Every Student, Every School* (ESES)

has altered the funding mechanism for students with mild learning difficulties in regular classrooms.

The discussion with the policymakers occurred prior to the change and was instrumental in capturing their concerns in relation to the adverse effects of disability diagnosis predicated upon the medical model. These thought processes led to the decision for the adoption of ESES. N3 from the Disability Programs Directorate spoke of the flat-lining trend of "hard disability types" over time, yet the diagnosis of autism spectrum and mental health disorders in NSW had massively escalated in recent years. He revealed that the detection of visible physical, visual and hearing impairments were generally more objective, whereas subjective types of additional needs such as behaviour disorder, autism and emotional disturbance were much harder to confirm as "different standards applied subjectively, and the implications could be very different on the child".

> Obviously there are some cases which are authentic, but things as autism spectrum there's this grey area where because of the funding lever – the lobby group particularly – you've seen this explosion in diagnosis. (N1)

N1 from the Office of the Director-General clarified that the proliferation of diagnosis was partly explained by the improvements in medical science to identify children with delayed language communication development and neuro-sensory issues. Across NSW, he elaborated that most of the supported children had "hidden" disabilities which only emerged when developmental milestones were not reached. Around 40% of children with a diagnosis of autism were identified after the age of five as the disorder was only picked up in the early years of learning. The funding framework characterised by disability categories had acted as a "perverse incentive" for disability diagnosis and medical practitioners were "pressured" to profile a child's learning difficulties under one of the specified categories to "trigger access to funding for assistance" (N1; N3). They equally observed the inclination of schools to bid for disability confirmation which opened up a broader range of educational options for a child. Consequently, N1 detailed that linking "disabilities" with a dollar value had led to the uprising trend of "desirable diagnoses". One of the shortcomings of utilising such disability categories was the tendency to profile a child with a disconnected list

of needs according to the eligible sources of support. The holistic needs of a child could be overlooked especially when the cause of learning difficulties was much broader than a medical condition.

> If an Aboriginal kid has a non-English speaking background, comes from a low socioeconomic home and is deaf, but is gifted and talented! We fund the child's Aboriginality, non-English speaking background and low-socioeconomic needs, disability and giftedness all separately. Where we require that to come together is in the school. The resources all sort of trickle in like little streams into a pot in the school, but the school doesn't look at it in a holistic way about what this kid actually needs, because they're pinned – well, the kid's black, so we've got to give him Harmony Day. Their mind set that these little streams of funding are parallel which all deliver different things rather than joining them together to become a mechanism to fulfil his needs. (N3)

The policymakers believed that to some extent diagnosis had been used to absolve teachers of their inability to teach students effectively. N1 explained that this practice dated back to the 19th century when teachers were proned to perceive that children experiencing learning difficulties or developmental delay were affected by some sub-normal conditions, with the construction of "purblindness" in England as an apt example. Instead of evaluating ways to deliver instructions that are better adapted to the learners' needs, there is still a tendency for teachers and other professionals to view a challenging learning situation as a result of students' "deficit" even up to these days.

> It's been my experience that educational psychologists, or psychiatrists, often have the view that *the* problem when a kid can't read is dyslexia from the perspective of a neurological background … whereas in fact it's broader than that. (N1)

Other alarming trends included the growth of diagnoses in behavioural disorder and "special" behaviour schools; the huge discrepancy in disability rates between boys and girls and the disproportionate over-representation of Aborigines in special

education (Graham, Sweller & Van Bergen, 2010; Graham, 2012). N1 cautioned that "special" education offered to some NSW children in segregated settings could have been adopted by some schools which lack the capability to respond successfully to students with additional support needs as the convenient solution. The 2010 Parliamentary Inquiry has disclosed the mindsets of some schools which opt for "diagnosis and labelling" rather than "capacity building" and professional development to cope with learner diversity (N3). The expert advisory panel formed to advise the government around supporting children with learning difficulties also confidently highlights that students' academic incompetence is a "product of poor teaching" (N2). While some children might be able to survive poor instruction, a huge number remain illiterate because the lessons fail to take into account their learning needs.

> And my experience with some schools, particularly with kids where they get noticed in here [DEC Head Office] ..., the focus then seems to be, "Well, let's get rid of the kid." But what's disappointing then is that the school is not saying, "What have we learnt from this, and what could we do differently?" It's like, "Well, we don't have to think now, because the problem's gone." In actual fact the problem was actually not the kid; it was the school. (N2)

Thus, N3 affirmed that decoupling disability assessment from resourcing was crucial to "avoid a national voucher scheme for disability based on individual kids, because the minute we do that, you've drawn a line around a group of kids and excluded a whole lot more" (N3). With the categorical resource distribution structure, the choice patterns for mental health diagnosis were prevalent, yet the government lacked the mechanisms to avoid those practices. Those issues expressed by the policymakers compelled for a new strategy to detach the earmarking of government funds with every identified learning difficulty. The new functional assessment tool introduced through *Every Student, Every School* serves this purpose by setting a funding threshold of $6000 to curb the surge of disability diagnoses in the vast grey area between serious and mild mental health disorders. Only students requiring educational support subsistence beyond the stated amount are eligible for integration support or disability funding. Since funding is not tied to the functional assessment, thus any

child can be functionally profiled to demonstrate their learning needs so that available resources can be effectively sought within the school or drawn from external help without the requirement of a diagnosis. The tool is also able to show the integrated strengths and weaknesses of a child so that schools could hollistically provide appropriate modifications.

4.4.2 Inclusion Embedded in a Continuum of Support Services

The introduction of Integration Funding Support in 2000 for students with disabilities to participate in the activities of regular classrooms demonstrates the government's intent to promote inclusion. The government took a bigger step towards that goal by launching the Learning Assistance Program in 2004 which shed the requirement of a medical diagnosis in offering immediate learning support. Schools were entrusted with the responsibility of making optimal use of the LAP funds to obtain teacher aide, equipment and learning material for students when such needs arise. N2 clarified that even within the Disability Programs Directorate a range of views could be observed. It was hard to gauge whether the directorate officers had good understanding of the difference between integration and inclusive education, and one term could carry a dissimilar meaning to each individual. Despite these positive efforts, inclusive school culture has not been successfully cultivated as diagnosis-based funding support has shown to be a much more popular choice than the needs-oriented LAP.

> We give you the money but you've got to make a decision about the money (LAP). That's much harder than "Oh, this kid looks different, let's go and get him diagnosed so I can get a thousand dollars and so another thousand dollars" (Funding support). (N3)

The replacement of LAP with *Every Student, Every School* comes at an opportune time that prevents the attraction of diagnosis for extra school funding through a fixed eligibility threshold. The NSW government endorses the recognition of diverse needs through the provision of a range of support placements. The maintenance of a continuum of services also stems from the different demands made by parent lobbyists and political groups. N2 from the Disability Programs Directorate reasoned that intense advocacy for regular schools to accommodate children with additional

needs has been concurrently conflicted by the other opposing requests for support classes and special schools. The current flexible policy position by the department, as clarified by N2, is to enable parents to "choose what they would like". If the government remains committed to the single philosophy of inclusion and dictates mainstream placements, "there are some people who won't be happy with it" (N2). However, he rephrased that not all parents have choice.

> Their kid has to go to a regular class because there may not be a special school nearby, or a support class nearby. Some parents, particularly in metropolitan areas, have got a greater variety of choice, so they could elect to have their child educated in a regular class or a special class or a special school. (N2)

Apart from respecting the wishes of various stakeholders, the government is wary that inclusion might "submerge" some children with a more urgent need for support when they become "lost within that broader community" (N1). Inclusion is only a good policy provided that the special needs, capacities and abilities of the children are appropriately addressed. For students whose "needs and capacities can really only be met in a sort of institution" (N1), the government has to make "professional judgments" to balance the need for inclusion as well as the need for specialised support. Full inclusion is thus not the aspiration of the government as opposed to instilling an inclusive school culture along the "normalisation continuum" (N2). It becomes incumbent on the school principal to ensure that inclusive practices are well-implemented, even in "special" settings. N3 stressed the importance of providing children with meaningful age-appropriate learning experiences and children with moderate intellectual disability should not participate "in a Year Nine lesson doing Shakespeare because everybody else that's fifteen is engaged in this thing called Shakespeare". Curriculum modification for individual needs in fact made learning more dignified as long as it did not demean individuals because of their difference.

> If the poor children are so very, very, very disabled with a really extreme disability, and if ... these children need to be in a special place, make sure that all the values and principles you'd expect in a school are flourishing there. Don't lock them away. Don't treat them as retards" (N1).

Incompatible with those justified statements, government special schools and support classes increasingly cater for students with emotional and behavioural disorders. The training of self-management skills for these children is not necessarily better when provided in segregated settings. Conversely, N2 pointed out that some schools tended to remove non-compliant students from classrooms so that lessons could carry on without disruptions caused by their challenging behaviours. In addition, segregative practices have persisted in some integrated support units in NSW which reinforce the stigma of disability and abnormality within schools.

> The way the kids in the support unit are being treated is just awful, and what this parent was saying, "Now, this is actually really, really damaging for everyone in this environment." She said, "Those kids in the support unit were actually better (off) in a special school." Her concern is that it's more damaging for the kids in a regular class to see the way these other people with disabilities are being treated. So if it's not done well, then you're actually strengthening that stereotype that they're weirdos...because they had this new outdoor area built and the message was: if kids from the special unit are in there, you're not allowed in there. (N2)

Based on the evaluation of policy statements and effects, inclusion is still overshadowed by the prevalence of the individual deficit model and most segregated settings have not adopted an inclusive approach to student support. It has been deeply ingrained in the mindset of many educators that children with "special" needs must be looked after by "special" people. Negative perception towards disability is also present at the departmental level. According to N1, issues relating to children with a disability are often indiscriminately referred to the Disability Program Consultant without prior judgment on the other curricular, health or social needs involved, as his or her disability is presumed to be the cause. Uniform understanding of the importance of inclusion must penetrate all levels of the education system to gain traction.

> I was shocked and really concerned that that was the attitude: "We don't have to worry, because there's actually someone out there – we don't know who, but somebody will come and help that classroom teacher!"

That's not reality. So, they do believe that these kids don't fit, that they shouldn't be there, that somehow they're going to be fixed by someone else. "It's not our problem". (N2)

In an ideal world, a directorate like this shouldn't have to exist, because it would be inbuilt into the philosophy or the understanding around how everyone does their work. (N2)

Multidisciplinary collaboration has to be enhanced in NSW schools and education department to jointly fulfil different aspects of a child's needs in an integrated manner. In order to function as an effective organisation, the department has recently adopted a new strategy called "working together" within and between all directorates as well as with parents, government agencies and non-government providers. Overall, the NSW education system still lacks efficient intervention procedures and a strong network of support to prevent school failure and discriminatory practices. Schools still perceive students' deficiencies as the cause of learning difficulties instead of reflecting on organisational improvement to accommodate diverse learners. The following section discusses the neo-liberal elements within NSW policies and performance strategies that inhibit the growth of inclusive school culture.

N2 also emphasised that the department could create conducive learning environments for children only with a range of other supports offered by relevant stakeholders dynamically. Ultimately, this strategy strived to instil the same level of understanding with regard to policy rationale, implementation needs and educational goals across all stakeholders, as opposed to having different attitudes and beliefs especially around disability issues. He confided that even with reasonable policies put in place, often results were not delivered at the implementation phase due to the loose connection and communication between stakeholders. N5 also shared similar concern that policy process often came from higher authority through the request of information from various directorates and offices but feedback and decisions were seldom relayed back.

4.4.3 Neo-liberalism as an Inhibitor to Inclusion

It will be elaborated here how these two discourses bear an opposite effect to each other which inhibits inclusion policies from exercising a more lasting influence in the school system. As detailed in the macro and meso levels, the NSW policymaking process has been linked with the former federal Labor government's priorities to push for fairer school information through annual school reports, assessment programs, enhanced standardised tests and examinations. The broader political environment has created this consistent agenda for years in public service which now drives the government's emphasis on literacy and numeracy proficiency as well as higher levels of professional learning. N2 clarified that accountability was embedded in this hierarchical structure where 78 School Education Directors in total were given the authority to supervise a patch of 20-30 schools respectively and were required to report to the regional directors of their progress. Schools were constantly monitored and audited by these directors. Standard-setting measures have expanded vastly through the federal implementation of the Smarter Schools National Partnerships which rewards states and school principals meeting the predetermined ambitious targets. Local and nationally-agreed literacy and numeracy targets have been established which transcend the public sector to include Catholic and independent schools. A reward system is in place to financially recompense beneficiary states which succeed in reaching the targeted benchmark.

> It is making attainment as an agenda, front and centre, for us. However, we
> do have really high targets in place. (N4)

The standards-based education reform extends to the curriculum framework which has an outcome-based approach. The curriculum design has not taken into account the whole broad cohort of school children even though the department has the duty to "cater for the top and bottom cognitively" (N1). The focus of classroom teaching is increasingly narrowed down to the areas scoped in standardised examinations so that all students could become "test-savvy" by the time they get to the Year 12 High School Certificate. To more accurately compare state-by-state and international performances, PISA is used as a barometer in NSW to "set up systems and

instruments that are world's best practice" (N3). Given that NSW major agendas have always lingered on "attainment, retention, university outcomes and the Bradley targets" (N4), the percentile drop at the high bands in PISA has caused great concern among policymakers even though Australian performance is above OECD average. The slight slip at the upper scales of Australian students' reading proficiency level is explained by N1 as the side effects of overemphasising basic literacy skills to the neglect of higher literacy skills.

While PISA only affected schools indirectly in the first few cycles of assessments, N3 asserted that it has now featured in day-to-day decision-making in NSW very prominently, especially in identifying new targets and policy directions. He elaborated that the priorities of state and the Commonwealth government were to find out Australian standing in the league table, strengths and weaknesses, the quality of national education as well as leadership and school capability in order to "set up systems and instruments that are world's best practice". N4 pointed out that ACARA's (Australian Curriculum, Assessment and Reporting Authority) national curriculum planning and NAPLAN design were strongly informed by the PISA model, with a strong emphasis on the expansion of highest band student population and minimum standard of learning outcomes. The new five-year strategic plan of the Department has taken on increased effort to drive improved performance outcomes and narrow the existing achievement gap.

The National Program of Literacy and Numeracy (NAPLAN) is the domestic measure of performance to compare the literacy and numeracy skills of children across state borders even when without a national curriculum. As a form of distant performative steering, students' individual proficiency level and school overall results are profiled against the national minimum benchmark. New South Wales has repeatedly demonstrated a high level of performance even with the lowest exemption rate across the nation. NAPLAN is also seen as a diagnostic test to identify students who fall below the expected standards for further mandatory assessments carried out by support teachers. However, there are reservations about the true diagnostic value of NAPLAN and concerns regarding the transformation of NAPLAN into a high-stakes test by publishing the results openly on My School website.

If you want to use it diagnostically, you don't sit the test in May and give them the results in August. That's futile. If you are going to use it diagnostically, [you'd] use it diagnostically the next day, wouldn't you? The next week. Or at least in the same month. (N4)

The public policy of information transparency and comprehensive reporting of school performance have been taken to a new height with the publication of school performance aggregates on My School. The intense competition between schools is viewed as "misleading and potentially harmful" (N4). The obsession of standards and ranking in the current assessment scheme has a stifling effect on efforts to promote inclusion as schools frown upon the presence of slow learners who might pull down school performance score. Many principals respond positively to the idea of increasing special resources and including children with additional needs, but resist the admission of those students in their own schools. N1 also brought up the issue of disproportionate representation of children from significantly disadvantaged areas and of Aboriginal origin in the lower achievement bands of PISA and NAPLAN, which could concentrate in a class or schools that only contained such "remnant hard core" group. N4 was more concerned that those children would be perceived as "that kid (that) dragged us down" in the presence of those high-stake testing.

The stigma associated with disability is harmfully individualised and linked to poor school results. Even though value-added components such as the concept of like-schools are included in the NAPLAN data, the inclusiveness of schools is not an important priority relative to school performance. This whole package of information profiling individual schools serves as the comprehensive database for parents to search for the "best" school in an educational marketplace. The effects are detrimental especially for students with additional support needs who become the victim of this ranking contest.

The school might want that [enrolment] figure [of students with disabilities] to look large because maybe that will be a filter for interpreting that performance. However, there may be interest in that figure being smaller, because it makes your school look like, you know, I

can send my child there and they're not going to be at risk of being in a class which will be diverted, or over-run, by these integrators. (N4)

The use of these performance measures has exacerbated social segregation and educational inequality as students are evaluated and differentiated according to academic ability. While high-performing selective and private schools emerge as the top choice in the educational market at one end, low-status schools in deprived neighbourhoods are left with a bad reputation from bottom-ranking educational performance. The overrepresentation of low SES students and Aboriginal students in disadvantaged schools shows how school marketisation can aggravate exclusion. While the public inquiry statistics revealed that 80% of students with a disability were in government schools, N3 remarked that non-government schools by and large did not recognise the additional learning needs of children. As a result, parents who had their children enrolled in non-government schools made use of the Centre for Effective Reading in Dalwood as a special education program because it serviced public and private schools. While Finland had been able to provide high standard of service in all schools, N3 added that Japan and Korea had been excluding a huge number of low-performing children who were "sub-normal" in PISA. Finland which had largely rejected market-driven mechanisms impressed N4 in its effective "formula" of comprehensive schooling and proactive support structures carried out by capable teachers that lifts performance across students from a wide range of socio-economic backgrounds.

> In our bleaker moments we console ourselves that Finland's population doesn't look a bit like Australia's. They don't have the diversity, they don't have the same kinds of equity group challenges that we have. However, having said that, they do some really constructive and interesting things in terms of teacher training, for a start, and the personalised approach to supporting students who start to show signs that they're at risk, and we don't do that in a systematic way. Nothing compared to them. I'd be surprised if they slide, because they seem to have a formula that's delivering. (N4)

The PISA results have also raised concerns relating to the different quality standards between schools in NSW, revealing that NSW has yet to successfully tackle educational inequality in all schools.

> We've got some wonderful schools and some really struggling suburbs. Western Sydney's really complicated, because they've in fact got the very best schools, and they've got some of the worst schools in our system. So if you look at the results – like, these results for western Sydney would tell you that they're average. They're really close to the state average, because the top balances the tail. They're all correlated. But that just speaks to the complexity of the system. (N5)

4.5 Conclusion

NSW has embraced the psycho-medical model as the gate-keeper to ring fence student support (Graham & Jahnukainen, 2011). The goal of the inclusion movement to enable students with disabilities to successfully participate in mainstream learning has met with limited success. Contradicting the illusion of large scale integration, support classes are in reality mostly occupied by regular students who have adopted the disability status. The trend of inner segregation is more prominent when the withdrawal and transfer of "normal" students into "special" support classes largely exceed the integration of "disabled" students in the mainstream setting. The funding mechanism which is tied to categorical disability diagnosis has incentivised schools to assign a child a disability category without considering his or her holistic educational needs. These exclusionary practices have created the worst impact on minority students and students with emotional and behavioural difficulties. Inclusive school culture has not been realised in NSW when special education still serves as the alternative for students who are abandoned by general education. The NSW government has maintained a strong policy position endorsing a continuum of support services and a parallel school system as opposed to full inclusion.

Neo-liberal ideologies have long influenced NSW policies which inadvertently act as a detrimental counterbalance to the government's inclusion policies. Within this competing framework, neo-liberal demands work against educational equity through the publication of NAPLAN results, school choice, accountability measures and

performative monitoring that substantially raise the stakes of academic competition. Privileged students in NSW are in a much better position to obtain a quality education within high SES schools and to excel in standardised examinations than disadvantaged students. Those policies were implemented to settle different claims and contextual needs between equality, rights to choose, better efficiency and higher standards which have resulted in some unintended effects arising from inter-policy struggle due to dissimilar principles or means.

The dilemma of educational priorities exist in this context and are represented by intra-departmental differences on educational "priorities and the most appropriate ways forward, but we enjoy those battles" (N4). The Australian government has persistently supported school marketisation and a strategic performance-based reward system that has widened the social divide instead of mitigating the influence of student's background on educational outcomes. The NSW disability model also works favourably with the neo-liberal competitive strategy as low-performing and non-compliant students could be separated from the "productive" students into support classrooms and special schools.

Chapter Five

Scottish Case Study

5.1 Introduction

Scotland's total population stood at 5.3 million in 2011 and is concentrated in the Central Belt constituted by major cities including Glasgow, Edinburgh, Dundee and Aberdeen (General Register Office of Scotland, 2012). The 2001 census reported that the Scottish population is made up of 88% White Scottish, 7.4% British, 1.0% Irish, 1.5% "Other White", 1.4% Asian (Indian, Pakistani, Bangladeshi, Chinese or Other South Asian) and 0.7% others (General Register Office for Scotland, 2001). The official language of government is Scottish English although about 1% of the population speaks Gaelic. Immigration from Eastern Europe has dramatically increased following the formation of the European Union in 2004 which has removed border control between member countries (Eurydice, 2008/09). As a result, roughly 32,000 workers of mainly Polish and other Eastern European origins within the ages of 18- 34 moved to Scotland from 2004 to 2006 (Eurydice, 2008/09). Following this trend, the number of children with English as a second language rose sharply.

Scotland has a high income economy with a Gross Domestic Product of £131,163 million for the fiscal year 2009/10 which represent 9.33% of the UK total although with only 8.4% of the UK population (Scottish Government, 2010f). It is a well-educated nation with approximately 60% of its working age population having attained upper secondary or higher education (National Statistics UK, 2007). The employment rate in Scotland is recorded at 71.2%, 0.7% higher than the UK employment rate (Scottish Government, 2012a). The United Nations Development Program (2006) reveals that Scotland has higher social cohesion and less inequality compared to Australia and the rest of the United Kingdom but Nordic countries have progressed further in this aspect.

This equality principle extends to education where comprehensive schooling is important to ensure that high academic attainment is as evenly distributed as possible. The concept of community-centred schools is firmly established in Scotland which

supports indiscriminate acceptance of children within the neighbourhood catchment area as a fundamental right (Croxford, 2000). Scotland promotes a social security welfare state based on the Westminster system, nevertheless with a greater degree of universalism than the rest of the UK through the implementation of equality initiatives such as the New Deal for Unemployed People as well as no prescription charges, exemption of higher education student fees and free personal care of the elderly (Haydecker, 2010; Scottish Government, 2003a). Three principal elements are practised in line with its social democratic theme such as the guarantee of minimum standards in terms of minimum income, social protection and service provision (Mooney & Scott, 2005).

Although school exclusion has decreased 54% from the peak of 58742 cases in 2006/07 to 26844 in 2010/11, pupils with additional support needs are 4 times more likely to be excluded (Pupil Inclusion Network Scotland, 2012; Scottish Government, 2011b). Likewise across the UK, the strong correlation between social class and education achievement can also be observed in Scotland where a child from low socio-economic background has lower chance of succeeding in schools and the situation deteriorates when the child attends a school which is located in a disadvantaged area due to low academic expectations and parental involvement (Croxford, 2001; Perry & Francis, 2010). This issue is exacerbated by the fact that Scotland is seventh-ranked among 30 OECD countries with respect to household earnings inequality, with a less equal income distribution than Australia and Finland although better than the rest of the UK[8] (Hills et al., 2010; OECD, 2008b); and 20% of the child population lives in relative poverty (Scottish Executive, 2001).

The Department for Work and Pension's Family Resources Survey (2009) examined income distribution across lower and higher wage earning groups which showed that economic inequality had grown since 2004/2005. The widening rich-poor gap in the UK is becoming a cause of concern as it is worse than almost three quarters of OECD countries, with a social mobility rate that is much lower than countries like Australia, Canada and Denmark (OECD, 2008b). The measurement of national

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[8] The Gini co-efficient for *Scotland* in 2005/06 is 0.31, Australia 0.307, Finland 0.26 and Malaysia 0.47 (Grainger
& Stewart, 2007; Tanton, 2009)

income inequality[9] in the mid-2000s shows that United Kingdom marks 0.331 point compared to Finland (0.254), Australia (0.315), Norway (0.276) and Iceland (0.257). It shows that the Nordic and western European countries have much lower poverty and higher social spending than the UK (OECD, 2012b). In the pursuit of better social equality, the Scottish Parliament has launched the Closing the Achievement Gap program and the agenda of building a wealthier and fairer society (Eurydice, 2008/09). The historical development of educational provision for students with additional requirements is also relevant to the discussion of educational equality in Scotland.

5.2 The Macro Level: Historical Background

Education for Scottish children with a disability can be traced back to the 18th century when Samuel Johnson wrote: "There is one subject of philosophical curiosity to be found in Edinburgh which no other city has to show; a college of the deaf and dumb, who are taught to speak, to write, to practice arithmetic by a gentleman whose name is Braidwood" (Murphy, 1825, p. 488). Thompson (2010) notes that there are three phases in the development of student support in Scotland from the handicap, medical to inclusion model. From 1950 to 1974, the government structured three categories of handicap from the "educable" (special school or class), the "ineducable but trainable" (occupational centre) and the "ineducable and untrainable" in mental deficiency hospitals. This compartmentalised model based on stigmatising categories of handicap and educability was directly linked with placement in a particular special placement or provision without considering other relevant causes or placement alternatives for the holistic benefits of a child.

The Education of Mentally Handicapped Children Act was put in place in 1974 to remove the terms of "ineducable and untrainable" which set the beginning of the second phase which lasted until 1999 (Scottish Government, 1974). According to this law, all children had a right to education and should have access to teachers including those in mental deficiency hospitals and day care centres. Nevertheless, the medical model still predominated public and professional understanding of

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[9] Income inequality is based on the Gini coefficient by measuring how evenly the income is spread in a country. 0 corresponds with zero inequality (everyone has the same income) and 1 shows full inequality where one person obtains all the wealth (Chen, Tsaur & Rhai, 1982).

"handicapped" children as requiring "treatment" (Keil, Miller & Cobb, 2006). In 1980, the Education (Scotland) Act was passed after the recommendations made by the Committee of Enquiry on Special Educational Needs in the 1978 Warnock report were well-received across the UK (Department of Education and Science, 1978; Goacher, Evans, Welton & Wedell, 1988). Based on this report, children should be perceived as having special educational needs (SEN) instead of being labeled as "handicapped". The aim was to abolish categories of diagnosed handicap which determined the kind of special provision and placement; so that other educational requirements of a child which could be caused by external factors were taken into consideration as well (Gavine, 2001). A legal education plan known as the Record of Needs was introduced to ensure adequate individualised support was given to the neediest children. Of the 20% of school-age children who were identified with SEN, only 2% required a Record of Needs in 1980 and they were integrated into Scottish mainstream schools where possible (Thompson, 2010). Legislation created with reference to the Warnock report has been used extensively with minor amendments until the year 2000 throughout the UK (Gavine, 2001).

The third phase in Scotland's educational development commenced with the ruling of the Standards in Scotland's Schools Act 2000[10], which pronounces "the presumption of mainstreaming" (Riddell, 2009, p. 7, SEED, 2006b, p. 1; Scottish Executive, 2002, p. 1) for all children unless exceptional circumstances apply. Education authorities are obliged by this Act to place all children, including those with a disability, in mainstream schools. This is a major policy shift from integration to inclusion which is strengthened by the official statement of the Inspectorate of Education which advocates that "inclusion is not easy, but it's also not optional" (Donaldson, 2004). The Education (Additional Support for Learning) Scotland Act 2004, which details the duties of education authorities to identify and address additional needs, is another measure that promotes the inclusion agenda. These Acts will be analysed in the meso chapter to determine their effectiveness on promoting educational inclusion based on enrolment trends of students with additional support needs. The types of schools and the schooling structure are discussed in the following section for a better understanding of the Scottish education system and to contextualise the subsequent enrolment data and discursive analyses.

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[10] More details on Scotland's Schools Act 2000 in the beginning of section 5.3.3

5.2.1 Education Governance and the Schooling Structure

All state-funded schools in Scotland have been comprehensive and co-educational since 1960 and only 14% are Roman Catholic schools while the rest are non-religious (Riddell, 2009). The current 2,722 state schools are run by education committees under the monitoring of the local authorities as prescribed by the Education Act 1946. Within the national system, there are eight grant-aided schools which have established some administrative pacts with the local education committee and are financially supported by the Scottish Government (Scottish Parliament, 2007). Seven of these schools are special schools[11] which are regulated by government statutory schemes in terms of cost structures, financial operation, daily management and teacher qualification to ensure the delivery of partially private educational provision to children with additional needs at a reasonable fee (Bell, Fowler & Little, 1973). Outside this public educational framework, there are 104 fee-paying and privately-managed independent schools, accounting for approximately 4% of total student population[12], which do not receive any funds from the government but are classed as charity organisations granted with generous tax relief.

5.2.2 The Political Context and International Scene

Scotland practises parliamentary democracy with a constitutional monarch as part of the United Kingdom of Great Britain and Northern Ireland (Lyon, 2003). The devolution of education decision-making power to Scotland from Westminster has allowed the independent development of education policies which are found to contrast sharply to those of the central UK government (Bryce & Humes, 2003; Walford, 2005). The main difference lies in the importance given to comprehensive schooling as opposed to the heterogenous system in the rest of Britain, with England in particular having many different types of school, some of which select on the grounds of academic attainment. Regional administration in Scotland was abolished in 1996 (Fairley, 1995). Through statutory powers, the Scottish Parliament is able to steer the operations of local authorities. The responsibilities of school management,

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[11] Refer section 5.3.6 for educational placements of students with additional support needs in state schools

[12] Refer section 5.3.8b for enrolment trends in public and private schools

staff employment, provision and financing as well as policy implementation were passed on to 32 local authorities following a major revamp (Fairley, 1995).

The 2007 Concordat produced the Single Outcome Agreements which were jointly endorsed by Ministers and the Convention of Scottish Local Authorities (CoSLA) (Eurydice, 2009). The Concordat specifies the relationship between central and local government founded on partnership and mutual respect. Local authorities are encouraged to liaise closely with ministers in making education policies and implementing the National Performance Framework (Scottish Government, 2007b). The Scottish Inspectorate of Schools is an arm's length agency charged with inspecting local educational services to ensure that adequate standards are maintained. This approach is complimented by the OECD and World Bank as corresponding to international developments as local needs are prioritised in education governance in the pursuit of national aims (OECD, 2007b).

Scotland also participates in the UK National Commission for UNESCO which strives to promote Education for All (EFA) with the provision of comprehensive education. Three goals are targeted to be achieved before 2015, including the provision of universal primary education, the improvement of adult literacy levels by 50% and gender equality in education (UK National Commission for UNESCO). The UK has also signed the endorsement of the United Nations Convention on the Rights of the Child (UNCRC) but it has not been legally recognised by Scottish law. Nonetheless, the Scottish Government supports the goals of the convention to guarantee the basic human rights of children as well as their full participation in family, cultural and social life (LeBlanc, 1995). These developments show the Scottish aspiration to educational equity and PISA serves as a useful tool to demonstrate how successful that has happened at the local and international levels.

5.2.3 Participation in International Student Assessments

In PISA 2000, Scotland performed better than the UK average (SEED, 2002), however, that was followed by a decline in performance. This decline saw Scotland achieve similar results to England and Northern Ireland in reading, mathematical and scientific literacy, although Scottish students still perform better than students in Wales and above the OECD average (SEED, 2004; Scottish Government, 2007a;

Scottish Government, 2010e). Based on the PISA data analysis in 2007, the OECD *Reviews of National Policies for Education* (2007b) found that Scotland was one of the high-performing countries with a strong commitment to equitable comprehensive schooling among other participating countries. However, several concerns were highlighted including the expanding achievement gap between the highest and lowest scorers in the final years of primary education through the early secondary years. The influence of socio-economic status on learning outcomes was also higher in Scotland (18.1%) than Canada and Finland which only had 11% of total variance related to SES (OECD, 2007b).

A key outcome of the wide consultation process is that Scotland needs "greater management freedom […] as part of a compact with local government which establishes expectations in exchange for autonomy, and encourages and protects innovation and risk-taking through an authoritative mandate" (OECD, 2007b, p. 16). Some of the recommendations proposed by the OECD Education Policy Committee, in relation to introducing minimum national standards, are influenced by neo-liberal thinking and they bear a direct influence in the recent education reforms undertaken by the Scottish Government, especially in the design of Curriculum for Excellence (SEED, 2006a).

5.2.4 Conclusion

The Scottish education system has taken pride in sustaining its long tradition of equal opportunities by providing free, compulsory education for 5-16 year olds based on a broad-based curriculum as a fundamental right (Eurydice, 2009/10). This core principle has been maintained through consensual political thinking as stated in many reports and policy documents although it has not been regulated by law. Unaffected by the process of devolution, Scotland has been able to maintain comprehensive schooling with a strong welfare culture. Nevertheless, the country faces growing challenges to tackle the disproportionate social distribution of attainment which is more obvious than other high-performing countries. This suggests that the strong equity principle has not met with widespread success especially in improving the educational outcomes of the lowest-attaining 20% in PISA. The following meso and micro level analysis builds on this understanding to explicate the relationship between context, student support provision and dominant discourses.

5.3 The Meso Level – Policy Development

This section discusses the analysis of policy library. Policy documents are first examined chronologically and then thematically to identify significant discursive trends in Scottish education system. The analysis first looks into shifts in the purpose and priority of education in Scotland, and the funding patterns over time. Changes in the concept of inclusion in Scotland are then discussed prior to examining the development of legislation related to student support services. As this research focuses on dominant discourses influencing policy decision-making, the analysis will consider the extent to which the concept of inclusion is driving special educational change. This will then be weighed with the examination of neo-liberal discourses in policy documents in order to determine which discourse has a more significant impact in the Scottish education.

5.3.1 The Purpose of Education

The Standards in Scotland's Schools Act (2000) delineates that education should be tailored according to age, ability and aptitude, and aim to develop the "personality, talents and mental and physical abilities of children and young persons to their fullest potential" (Scottish Executive, 2002, p. 1). The Scottish Executive also pronounces their vision to realise "a Scotland in which every child matters, where every child, regardless of his or her family background, has the best possible start in life" (Scottish Executive, 2000; Scottish Executive, 2004b, p. 6). The discourse of equity manifests clearly in the continued emphases on equal individual holistic growth and success. Simultaneously, a renewed emphasis on the economic importance of educational performance has also emerged stronger than ever as a highly educated workforce is required to exploit the growing international markets and to support knowledge-based industrial revolution. The goal to achieve a "smarter Scotland" has brought up initiatives to modernise its curriculum design and assessment format (Scottish Executive, 2008). The 2011-12 Scottish Spending Plans and Draft Budget states clearly that:

Scotland's long term economic success depends on having highly skilled people who can confidently capitalise on opportunities, adapt to changing demands, create and develop new knowledge and harness the potential of technological advances. (Scottish Government, 2010g, p. 128)

A new national performance framework has been introduced which outlines 15 national outcomes to strive towards one central purpose: "To focus government and public services on creating a more successful country, with opportunities for all of Scotland to flourish, through increasing economic sustainable growth" (Scottish Government, 2007b, p. 2). It is evident that education has been aligned with government economic strategies through the articulation of three national outcomes: "We realise our full economic potential with more and better employment opportunities for our people" (p. 14); "we are better educated, more skilled and more successful, renowned for our research and innovation" (p. 23); and "our young people are successful learners, confident individuals, effective contributors and responsible citizens" (p. 22). Arnott and Ozga (2012) claim that the targeted national outcomes appear to be "rather direct translation of OECD priorities into education policy" (p. 151) and key terms foregrounded in the fight against inequalities was employed to garner public support.

Nevertheless, the emphasis placed on social fairness is irrefutable with inclusive success criteria that have been built into the performance framework since 2008. The government pronounces their aspirations to ensure "our children have the best start in life and are ready to succeed" (p. 20); "we have tackled the significant inequalities in Scottish society (p. 28)"; and "we have improved the life chances of children, young people and families at risk"; and "our public services are high quality, continually improving, efficient and responsive to local people's needs" (p. 29). The double agenda of raising achievement and alleviating inequality are articulated very clearly in those policies so that all children regardless of their background and abilities are educated as equally as possible in order to produce a generation of effective economic contributors in their future employment. However, efforts to reduce the achievement gap have to date been unsuccessful as inequality in educational achievement at age 15 is slightly greater in Scotland than England (Hills et al, 2010).

5.3.2 Important Concepts in Scottish Legislation

In Scotland, the term "additional support needs" (ASN) has replaced "special education" in 2004 as a result of the Additional Support for Learning Act. The term is intended to indicate the requirement of an additional or a different form of educational provision for a child or young person to benefit from school education. Additional support is given to children whose need for provision is beyond that normally available in mainstream schools in their locality (Gavine, 2001). The support aims to develop the personality, talents, mental and physical abilities of the child or young person to their fullest potential (Scottish Executive, 2003; Scottish Government, 2009c). The concept of ASN aims at covering broader forms of barriers that could prevent children benefitting from school education and "may be seen as an attempt to revert to a unitary category embracing all children with disabilities, disadvantages, and difficulties" (Riddell, 2008, p. 115). Disability categories have since been replaced by the types of provision based on the education model (Gavine, 2001), although the Scottish Government continues to request schools to report on the number of students with ASN in different categories based on their principal difficulties for the annual statistical publication of school census data.

Inclusion and integration are two distinct concepts used in the Scottish policy discourse (Scottish Executive, 2005c, Section 2.3). The 1978 Warnock Report first introduced "integration" as a movement to incorporate children with special educational needs into the mainstream learning environment (Department of Education and Science, 1978). The focus then expanded to improve the quality of education so that it can be fully inclusive of children irrespective of their backgrounds and abilities (Parliament UK, 2006). In a government report entitled "Count Us In - Achieving inclusion in Scottish schools" (HMIE, 2002), an inclusive school is elaborated as having a healthy ethos of achievement and high expectations for all students; appreciating diverse talents and abilities; being proactive in removing learning barriers; going against discrimination; and forging understanding within the community (Learning and Teaching Scotland, 2006).

5.3.3 Legislation and Development of Student Support Provisions

The benefits of including children with additional support needs alongside their peers in mainstream schools have long been recognised by the Scottish government. In 2000, the Standards in Scotland's Schools Act was passed which endorses the presumption of mainstreaming unless three specified conditions apply (Scottish Parliament, 2000). The Act only allows the placement of children in special provision if (a) mainstream learning would not be suited to the ability or aptitude of the child; (b) the provision of efficient education with other children is affected; or (c) unreasonable public expenditure is incurred (Riddell, 2009). The subsequent guidance circular elaborates that children who recurrently display "severely challenging behaviour" satisfy the second condition (Scottish Executive, 2002, p. 4) as they cause disruption to the education of other children (HMIE, 2003). Huge expenses to develop accessibility strategies for a child, such as enormous physical modification of school facilities and expensive equipments, are unreasonable if it is "completely out of scale with the benefits to the wider educational community" (Scottish Executive, 2002, p. 5). Although a very positive policy outcome, the three loosely subjective clauses enable schools to exclude children if deemed necessary. Although generally in support of mainstream placement if conditions allow, the Scottish government does not envisage the inclusion of all children as 1% of children are educated in special schools.

A year later, the Special Educational Needs and Disability Discrimination Act was decreed by the UK parliament and was extended to the Education Disability Strategies and Pupils' Records Scotland Bill 2002 (Disability Rights Commission, 2002; Scottish Parliament, 2002). Local authorities are bound by this Bill to implement accessibility strategies and make reasonable adjustments to create inclusive learning environments. The Bill prohibits discrimination against disabled pupils in education provision, school admission and exclusion, learning adjustments and treatment (Disability Rights Commission, 2002; Riddell, 2009). However, local authorities are not obliged to provide auxiliary aids and services which greatly reduces the effectiveness of this legislation (Riddell, 2006). The Disability Discrimination Act has been superseded by the Equality Act 2010 which obliges the provision of reasonable adjustments for disabled persons to prevent the effects of

substantial disadvantage and increases anti-discrimination protection in education, employment, facilities and services.

5.3.4 Additional Support for Learning

The Education Additional Support for Learning (ASL) Act came into force in 2004 which broadened the concept of additional support needs (ASN) and entrusted schools to identify and cater for the needs of a wide range of children (SEED, 2004). This overarching concept goes beyond categorical limitations of the previous "special education needs" (Keil et al., 2006) by incorporating a variety of socio-cultural, emotional, linguistic or intellectual difficulties and disadvantaged family backgrounds in this new term. According to the Code of Practice (Scottish Executive, 2005d), education authorities are required to prepare an individual educational plan (IEP) or coordinated support plan (CSP) [13] to map out support services and educational placement for a child with additional support needs. Annual review of the CSP must be undertaken to determine whether there is any change in the circumstances of the child and whether the provision needs to be amended, such as removing a child from the special setting if his or her needs can be effectively met back at a mainstream school (Scottish Executive, 2003, Scottish Government, 2009c). Albeit the 2000 Standards in Scotland's Schools Act pronounces a stronger endorsement of the mainstreaming policy, the ASL Act which was revised in 2010 has strengthened the focus on immediate provision of educational support in the prevention of school failure. This proactive approach aspires to identify and resolve early learning difficulties, avert school exclusion and promote an inclusive school culture; although no evidence is adduced that more children's needs are actually being met.

In 2010, Her Majesty's Inspectorate of Education (HMIE) reported that systematic means of conducting needs assessment and providing effective intervention to support the education of children with complex disabilities or from abusive family backgrounds require a lot of improvement (HMIE, 2010). Provision for young people with emotional and mental health issues also has major scope for development. A positive key finding shows that the GIRFEC (Getting it Right for

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[13] IEP is catered for students with mild or moderate learning difficulties while CSP is used when students have much greater support needs (SEED, 2004). Only students with the CSP are considered for special provision. These two support records are elaborated in section 5.3.6 on enrolment trends.

Every Child) approach has encouraged more inter-agency collaboration to resolve communication and language difficulties encountered by children in the early years (Scottish Executive, 2005a; 2005b). Yet, major reductions in local authority staffing budget have limited GIRFEC from reaching its full potential. This joint co-operation aims to engage and empower children and families in education and break cycles of poverty and inequality through the delivery of quality prevention and early intervention via a coherent and collaborative approach (Scottish Government, 2009b). However, the HMIE inspection data corresponded to the Audit Scotland report (2010) which revealed that the support provision and the use of CSP across local authorities remain inconsistent and highly variable. Corresponding with the interview data at the micro level, shortcomings in the implementation of the ASL Act at the school level have not been effectively addressed due to inadequate funds, compounding social segregation in school catchment areas and the lack of teacher preparation to deal with student diversity.

> However, in both mainstream and residential special schools, there is still much work to be done to ensure that barriers to learning are removed or minimised, as far as possible, and that children are engaged in relevant, enjoyable and stimulating learning experiences. (HMIE, 2010, p. 7)

In response to these findings, the 2010 National Framework for Inclusion was introduced to ensure universities train teachers in providing better classroom support. This new orientation occurred concurrently with the Curriculum for Excellence which has been rolled out to bring more coherence, choices, chances and flexibility to Scottish 3-18 school education (Scottish Executive, 2008). Personal support is also emphasised in the curriculum to ensure students can transition smoothly into positive and sustained destinations. Pupils with additional support needs learn through the same curriculum which allows flexible adaptation to suit individual needs (Eurydice, 2008/09). The Scottish Qualifications Authority (SQA) has also proposed the staged intervention approach to enable those children to follow the new National Qualifications (HMIE, 2010, p. 15). The approach consists of four stages to effectively tackle learning problems as early as possible from universal to the most targeted support. These major developments in 2010 have prompted the rise in the

provision of individual education plan notably in mainstream schools (Scottish Government, 2011d, part 16).

5.3.5 Funding Allocations and Targeted Areas

On average, around 13.1% of total public expenditure was allocated to the education sector between 2005-06 and 2009-10 (Scottish Government, 2011c). In fact, the Scottish government invests in education and training comparatively more than the rest of the UK which generally only apportions 11.5% (Nation Master, 2003-2012). This higher allocation corresponds with the fundamental Scottish principle of equal educational opportunities through eliminating financial barriers of students to attend schools and universities. Some measures include the provision of free primary education, books, transportation and school meals to pupils in primary 1 to 3 (Scottish Executive, 2001). Based on the devolved management scheme, an annual grant is also paid by the government to local authorities who hold the power to decide the actual amount earmarked for education (Bryce & Humes, 2003). Schools are given the freedom to manage at least 80% of the given funds (Adler, 1997). Following the concordat in 2007, the transition to non-hypothecated funding was made to facilitate greater ownership for local governments to decide spending priorities to promote innovative, outcome-oriented and strategic management.

Table 5.1: Central and local government expenditure on school education (£ millions) 2002-03 to 2007-08

	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	Increase (%)
Pre-Primary	213,147	236,949	258,869	284,484	297,860	315,000	318,612	49.5
Primary Education	1,300,929	1,435,967	1,532,970	1,613,035	1,683,226	1,741,600	1,790,060	37.6
Secondary Education	1,473,250	1,609,631	1,723,232	1,819,388	1,911,982	1,954,711	2,022,262	37.3
Special Education	354,081	390,926	434,762	454,788	463,962	488,642	509,085	43.8
Other	192,446	199,313	230,842	235,181	239,802	247,000	229,108	19.1
Total	3,533,853	3,872,786	4,180,675	4,406,876	4,596,832	4,746,953	4,869,127	34.3

Source: Scottish Government, 2010b

According to the latest data available, government funding for special education has increased by 43.8% over seven years from 2002, which only comes second to the 49.5% increase for pre-primary education. The growth of special education expenditure is geared towards overcoming the inadequacy of funds voiced by the local authorities in this area (SEED, 2003b) and correlates with the increased provision of individual education and coordinated support plans[14]. This budget differs from the provision for students with English as an additional language which has also risen sharply (Scottish Government, 2011d, part 16). Further, since the enactment of the Education (Additional Support for Learning) (Scotland) Act 2004, inclusion program funding amounting to £20 million was annually awarded from 2000 to 2005 to support the integration of children with additional needs into mainstream schools. The Equality Statement 2011/2012 also announced that there is a reduction of £168 million resource and £65.8 million capital in the learning portfolio as a result of the UK Government budget cuts (Scottish Government, 2010a).

To comply with the new demands of the enriched curriculum, £9 million budget is also catered for the development of a new generation of National Qualifications (Scottish Government, 2010g). The investment aims to deliver higher standards of learning and teaching by reducing complexity while enhancing greater autonomy for teaching professionals. The new qualifications stress important skills and attitudes in order to improve the prospects of young people to "flourish in the labour market of the future" (Scottish Government, 2010a, p. 128). The budget content shows the orientation towards equality of outcomes as well as higher academic performance for economic competence. Overall, funding allocations aim to support programs which contribute towards the national priorities of building a fairer and smarter Scotland. Inadequacy of funds even with the consistent annual increment in government expenditure for special education can be explained partly by the growth of support provision at a much higher rate in the following section on enrolment trends in Scottish schools.

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[14] The coordinated support plan (CSP) which was introduced through the Education (Additional Support for Learning) Scotland) Act 2004 is in the process of replacing the Record of Needs (RON). The CSP has been used much more sparingly than RoN. Refer to the next section 5.3.6 for enrolment trends.

5.3.6 Enrolment Trends

Table 5.2: Enrolment of pupils with a co-ordinated support plan and/or individualised education plan

(additional support needs)[15]

Year	Total Enrol-ment	Special School			Special Unit (SU)			Partly Integrated (SU+MC)			Fully mainstream classroom (MC)			Total (%)
		No.	%[16]	%[17]	No.	%	%	No.	%	%	No.	%	%	
2001	745,063	8183	1.10											
2002	738,597	7981	1.08											
2003	732,122	7680	1.05	36.1	319	0.04	1.5	1749	0.24	8.2	11514	1.57	54.2	2.90
2004	723,389	7389	1.02	22.6	752	0.10	2.3	3612	0.50	11.0	20999	2.90	64.1	4.70
2005	713,240	7140	1.00	20.6	873	0.12	2.5	3879	0.54	11.2	22788	3.19	65.7	4.85
2006	702,737	6975	0.99	19.3	957	0.14	2.6	4068	0.58	11.3	24148	3.44	66.8	5.15
2007	692,215	6709	0.97	18.4	997	0.14	2.7	3518	0.51	9.6	25320	3.66	69.3	5.28
2008	681,573	6756	0.99	17.5	1069	0.16	2.8	3275	0.48	8.5	27616	4.05	71.2	5.68
2009	676,740	6673	0.97	15.1	981	0.14	2.2	3128	0.46	7.1	33395	4.93	75.6	6.64
2010	673,133	6800	1.01	9.7	1016	0.15	1.4	3660	0.54	5.2	58838	8.74	83.7	10.44
2011	670,511	6973	1.04											
+/-	-10%	-15%	-6%	-73%	+218%	+275%	-7%	+109%	+125%	-37%	+411%	+457%	+54%	

Source: Scottish Government, 2011c, part 4; Scottish Government, 2003b; Scottish Government, 2009a, part 4; part 9;

Scottish Government, 2012

[15] Additional Support Needs figures include all grant aided special school pupils with an IEP or disability recorded in these categories but exclude independent school enrolment and pupils with English as an additional language. Data from 2009 onwards shows pupils with a CSP and/or IEP. Data prior to 2009 shows pupils with RoN (Record of Needs), CSP and/or IEP.
[16] Percentage of total enrolment for all school-aged pupils
[17] The share of pupils with a CSP and/or IEP

The table above indicates that the number of special school placements has met with a greater decrease than the 10% reduction of student population over the 10 years. A 6% fall can also be observed in the percentage of all school-aged children who receive education support in special schools. It is important to note that the share of the four support arrangements (Footnote 9) can be misleading as the proliferation of IEP provision taking place at mainstream classrooms have significantly dwarfed the proportion of enrolments in special schools, special units and partly integrated arrangements. In addition, some of the "partly-integrated" students might in reality spend relatively little time in mainstream classes than special units. The *High Level Summary Statistics* provided by the Scottish Government (2010c, p. 23) projected a decreasing share of special school enrolment, however the dramatic 73% decrease from 2003 to 2010 is only a result of the disproportional boom of additional support given at mainstream classrooms. Nevertheless, the slight downward trend of special school enrolments correlates with the closure of special schools since 2003 as shown in the graph below.

Figure 5.1: Number of state special schools[18]
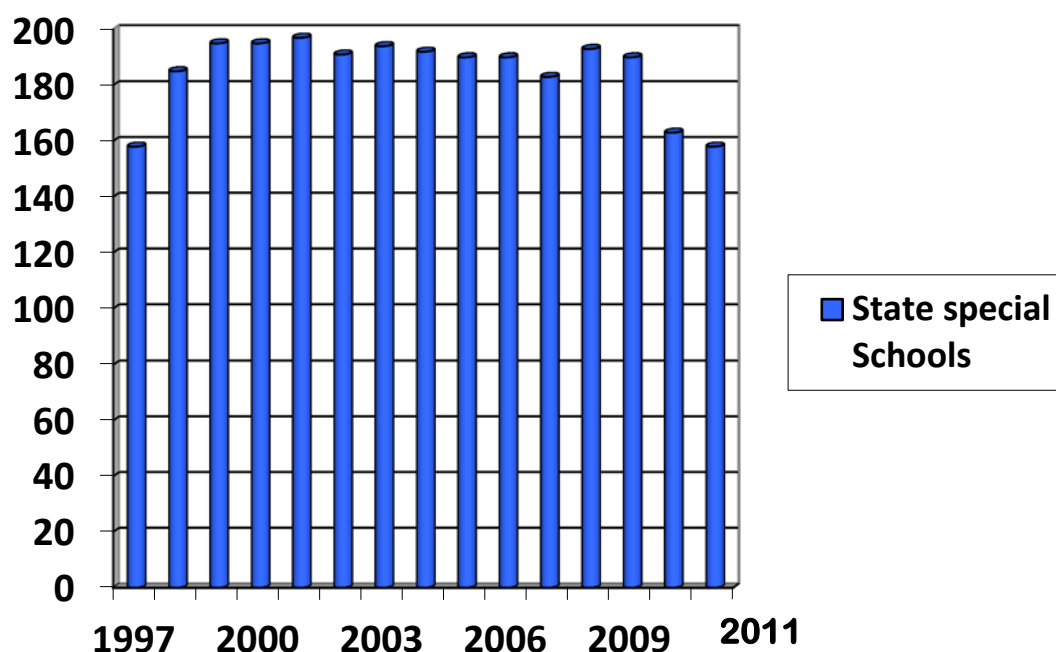
Source: Scottish Government, 2009a; Scottish Government, 2012a

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[18] Include grant-aided special schools

Figure 5.2: Enrolment trends based on percentage of total student population with four support arrangements[19]
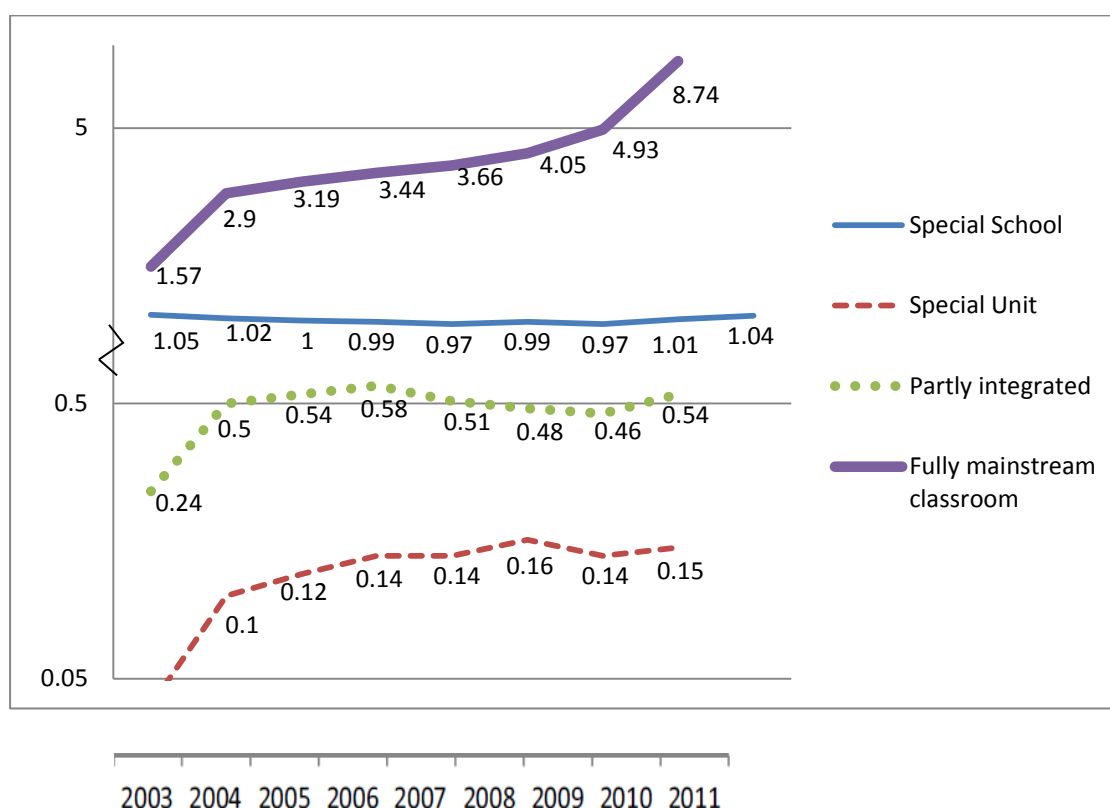
Source: Scottish Government, 2011c, part 4; Scottish Government, 2003b; Scottish Government, 2009a, part 4; part 9; Scottish Government, 2012

The introduction of the ASL Act in 2003 has seen a slight decrease in special school enrolment along with the increase of special unit and partially integrated arrangements for the following years. The evaluation of mainstreaming pupils with special educational needs conducted by the Scottish Executive (2005c) found that 23 local authorities "had made efforts to move children from special schools/units into mainstream schools" (p. 20). This development can be interpreted as an integration movement although the transfer from special to mainstream schools has occurred only gradually in small numbers. The number of students in mainstream classrooms who fall under the ASN umbrella and provided with an individual education plan has shot up at a much higher rate relatively. Although this is not related to large scale integration or mainstreaming, it shows an effort to increase support provision to children with mild learning difficulties in regular classrooms. The coordinated support

[19] Data for 2011 is only available for special school enrolment

plan which provides higher level of support is more common among students in the other three more segregated learning settings but the percentages remain rather stable. The proportion of pupils in special schools levels has remained steady at around 1% followed by 0.52% of partially integrated students and 0.14% of students in special units. Even though the number of recorded needs had doubled from 5.7% in 2008 to 10.3% in 2010 (Thompson, 2010), further segregation of mainstream school-aged children into special units and schools is not evident based on the line chart above.

Another interesting observation made is that there is a pattern of "high mainstreaming in outlying areas [with] low mainstreaming in cities" (Royal Society of Edinburgh, 2001). This inter-authority variation with regard to mainstream enrolment is largely explicable by the choices available to parents of children with additional support needs in cities (HMIE and Auditor General Accounts Commission, 2003; Scottish Executive, 2005c; SEED, 2006b). The Insight 27 (SEED, 2006b) published by the Scottish Executive notes that the "cities of Glasgow and Edinburgh continue to act as magnet providers of special school placements" (p. 2). 3.05% of school-aged children in Glasgow were enrolled in special schools in 2002 which sharply contrasted with the nationwide 1% average. The percentage drops from cities such as Edinburgh (1.5%), Aberdeen (1.2%) to Dundee (0.7%) (4). In 2001, as much as 53% of pupils recorded as having special educational needs from Glasgow studied in special schools while Edinburgh had a record of 28%. The government believes that the persisting lower mainstreaming trend in cities has occurred even prior to the ASL legislation and the Standards in Scotland's Schools Act 2000 (SEED, 2006b, p. 2). This trend also coincides with the OECD review of socioeconomic-related academic disparity as Glasgow contains more pockets of low-income residential areas than relatively more affluent cities like Edinburgh and Aberdeen.

However, the prospects of mainstream learning differ based on the type of difficulties children experience. As described by the Riddell Committee in 1999 (Scottish Executive, 2005c, p. 21),

> [Children] with physical or sensory impairments are more likely to be educated in mainstream than those with severe learning difficulties, multiple difficulties or social, emotional and behavioural difficulties.

Certain categories like moderate learning difficulties as well as socio-emotional and behavioural disorders were significantly associated with boys from underprivileged neighbourhoods (Riddell, 2009). By measuring the reported incidence of categorical needs against the Scottish Index of Multiple Deprivation (SMID), the figure below illustrates a similar trend whereby the number of identified needs increased noticeably along with greater social deprivation shown as SMID deciles. The growth rate is most pronounced for the two subjective or non-normative categories [20] of "learning disability" and "social, emotional and behavioural difficulty" (Lloyd, 1997; MacLeod & Munn, 2004). Children from the lowest socio-economic status background are twice as likely to be identified with support needs, notably in these subjective categories, relative to those from the least disadvantaged areas (Riddell et al., 2010).

Figure 5.3: Percentage of Scottish school population within each Scottish index of multiple deprivation (SIMD) decile by type of difficulty (% in each group in stacked bar)
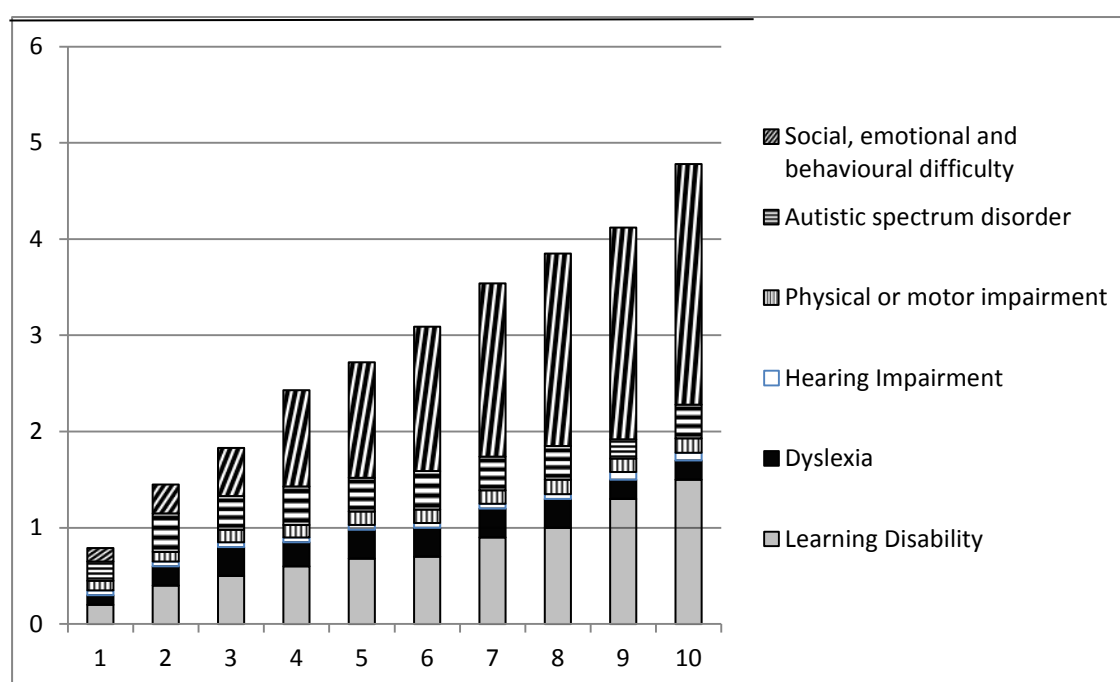
Source: Riddell, Stead, Weedon & Wright, 2010, p. 186 (Scottish Government)

Notes: 1 = least deprived area, 10 = most deprived area.

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[20] The high-incidence non-normative categories involve identification techniques which are highly subjective in nature based on different professional judgments as opposed to the low-incidence normative categories such as physical, visual and hearing impairments (Graham, Sweller & Bergen, 2010).

5.3.7 Reflecting on Policy Development

The student support structure in Scotland is more heavily based on the educational model rather than the medical model typical of "special" education. Since the enactment of Additional Support for Learning Act 2004, the transfer of students from special to mainstream schools has occurred to a very small extent as the 1% enrolment in special provision has remained rather static throughout the years (Riddell, 2009). However, statistics have shown that more and more students with physical, visual and hearing impairments are educated alongside their peers. Categorisation used during pupil census for statistical purposes is also not the official practice to allocate funding in the education system. Provision is made based on identified needs and coordinated support plans.

5.3.8 Neo-liberal Influence

Terms such as "performance" and "outcomes" have infiltrated public governance in Scotland especially since the new national performance framework was introduced in the Scottish Budget Spending Review 2007 (Eurydice, 2009/10). Assessment of outcomes against national quantifiable benchmarks becomes the key component of service delivery as part of the Government Economic Strategy (Scottish Government, 2007c). This framework also aims to further the existent national priorities of education to raise standards of educational attainment; enhance learning through well-trained teachers and the development of conducive learning environments; promote the inclusion and equality of children with additional support needs; inculcate positive values and citizenship; and equip pupils with the necessary skills to thrive in a changing society (SEED, 2003c). The extent of neo-liberal influence in the Scottish education system is analysed in the following sections.

a) High-stakes Assessment and Streaming

The 3- 18 learning grades in Scotland guarantee automatic progression from year to year without any requirement to reach certain level of attainment (Eurydice, 2008/09). The system currently does not allow the repetition of an academic year and normally students' additional support needs are addressed in their own classroom with their

peers. These practices have been retained in the new curriculum which further strives to remove educational dead ends by introducing more academic options (Scottish Executive, 2004b). Scottish national qualifications have been streamlined since the advent of CfE and differentiation of difficulty levels is abolished to delay selective streaming, avoid school drop-out and increase participation until age 16.

Although CfE contains those inclusive aims, its other aspects reveal neo-liberal practices such as reward and selection, accentuation of "'skills for work" (Priestly, 2010, p. 32), national standards, "much clearer outcomes" (Scottish Executive, 2004a, p. 4) and a more narrow focus by "assessing only what needs to be assessed" (Scottish Executive, 2004a, p. 4). The new curriculum is widely referred to in the process of updating the content and reviewing the structure of all qualifications. The new qualifications at Access, Higher and Advanced Higher from SCQF levels 3 to 5 attempt to ensure "all learners receive appropriate recognition for their achievements in line with agreed national standards and are progressing in line with expectations" according to the new curriculum (Scottish Government, 2011a, p. 3). Top performers with excellent grades are allowed to begin studying for the "Highers" a year earlier to overcome the "two-term" dash (Scottish Qualifications Authority, 2008, p. 2). Although the stakes have risen with the heightened curricular standards and assessment rigour in secondary schooling, primary education remains free from large cohort standardised testing.

Another form of achievement-based grouping is the practice of setting or streaming since 1996 in Scotland which has seen the reduction of mixed-ability teaching (Gamoran, 2002). This reform is endorsed by the official guidance entitled "Achievement for All" by the HMIE (SOEID, 1996) which encourages organising pupils into different attainment groups in primary schools for English and mathematics; and further extends to all subjects at the secondary level (Smith & Sutherland, 2003). The guidance states that "the main consideration in organising pupils into classes should be to create the best conditions for effective learning and teaching" (SOEID, 1996, paragraph 2.1). Some concerns raised during the national debate on education were the increasingly dominant testing culture and the narrow focus on academic targets (SEED, 2003a). Ability streaming conflicts with inclusive education as students with disabilities or from disadvantaged background would be marginalised to the lowest performing class for administrative and instructional

convenience. The OECD *Reviews of National Policies for Education* (2007b) recommended that Scottish policymakers should focus on "the construction of incentives and the pursuit of higher achievement through the 3-18 curriculum" (p. 210) for these at-risk students but the low expectations accompanying low-tracked classes are not conducive to reaching that goal.

b) School-choice Policies

Most Scottish children attend the school in their local catchment area (Echols & Willms, 1995), however, the Education (Scotland) Act 1980 grants parents the right to request the enrolment of their children in a school outside of the area (Adler, 1997; Scottish Education Department, 1985). The local authority has a duty to fulfil the request if there is such vacancy in the preferred school (Eurydice, 2008/09). This elaborate right of appeal gives the flexibility of parental school choice although Scotland does not encourage the use of choice as a lever for raising quality. The policy text entitled Ambitious Excellent Schools expressed the aspiration to promote universal high quality in all schools:

> No one in Scotland should be required to select a school to get the first rate education they deserve and are entitled to. Choice between schools in Scotland is no substitute for the universal excellence we seek and Scotland's communities demand. (Scottish Executive 2004a, p. 2)

While 90% of Scottish parents did not place request for school placements outside their local areas, parents with higher level of education from working and upper social class in the cities were more likely to choose schools (Willms, 1997). Residents from poorer peripheral estates in urban areas also try to exercise choice to get their children into schools in more affluent areas. Inner-city movements of pupils to middle class areas to avoid local schools with a low socioeconomic status are not uncommon in cities like Glasgow, Edinburgh, Paisley, Aberdeen and Dundee (Scotsman, 2007). Huge differences in the social composition of schools between various catchment areas in Edinburgh and Dundee can be seen as early as 1987 (Raab & Adler, 1987). Although the 2007 OECD report affirms that there is little school diversity observed across Scotland with small between-school differences (OECD, 2007b), the

popularity of certain schools across education authorities such as Renfrewshire is undeniably causing a stir among eager parents aiming for the highest quality of education for their children. Although the Scottish government does not publish performance league tables to promote school choice, the local media and benchmarking websites accumulate examination achievements for public viewing (Scottish Statistics, 2012). Nevertheless, placement requests and catchment preferences largely concentrate in cities; while for sparsely populated rural areas with only one school within a reasonable distance, school choice is just not feasible (Curtis, 2005; Teelken, 1999).

As many as 96 % (676,740) of the student population in Scotland is educated in public schools while only 4.3% (30,507) accounts for privately funded independent schools in 2009. The proportion of pupils who receive private education in Scotland has remained rather stable at 4% although the private enrolment percentage based on the student population of each local authority is higher in Glasgow (8.7%), Aberdeen (14.41%), Clackmannanshire (15.76%) and Edinburgh (19.51%) (SCIS, 2012). In 2006, there were 61 independent primary schools and 55 independent secondary schools, none of which receive government funds (Scottish Government, 2006). However, controversy has erupted since 2006 on the issue of large tax break given to Scottish private schools which are classed as charities albeit charging costly tuition fees, an initiative deemed unjust as "state comprehensives in some of Scotland's most deprived areas are being charged full rates, paid by local authorities from the public purse" (Hutcheon, 2012, paragraph 2).

The table below shows that 87.2%/ 6673 children with the highest support needs were enrolled in state and grant-aided special schools in 2009 but the share of independent special school enrolment is rising at a very slow pace. Many of the independent special schools are increasingly providing for children with behavioural difficulties as many local authorities cannot afford to offer these services. State schools remain the common "choice" of the public although the existing rich-poor divide in cities might become more prominent with the evolution of popular and less popular schools, in addition to the gradually thriving independent education providers.

Table 5.3: Enrolment in independent schools

Year	Independent School Enrolment	% Total student population	No. independent special schools	Enrolment in independent special schools[21]	% of special school enrolment [22]
2001	30,400	3.9	33	1,038	11.3
2003	30,344	4.0	33	1,053	12.1
2006	30,519	4.2	34	1,103	13.7
2009	30,507	4.3	45	982	12.8

Sources: Scottish Government, 2010d

c) Accountability and Benchmarks

Accountability measures in Scotland have been put in place for decades through regular school inspections and random sampling of national tests (Scottish Government, 2010g). In recent years, the government has also encouraged schools to do self-evaluation and report on school improvement based on the specified standards in the new Curriculum for Excellence (Croxford, Grek & Shaik, 2009). The HMIE publication in 2007 – "How Good Is Our School: The Journey to Excellence" is widely used during school inspection to determine how well schools score in 30 different quality indicators with a focus on achievement, educational inclusion, capacity for self-evaluation and continuous improvement (HMIE, 2006; HMIE, 2007). The specification of benchmarking indicators shows an effort to align "purpose and all performance management systems … to a single, clear and consistent set of priorities" based on the National Performance Framework (Scottish Government, 2007b, p. 12). Although Arnott and Ozga (2012) points out that self-evaluation is a mechanism to reduce Scottish government expenditure, educational investment has in truth increased substantially by 34% over the period of 2003-2009.

At the national level, the Scottish government gauges the levels of attainment and provision through gathering random samples via the Scottish Survey of Achievement [23] (Scottish Government, 2009d). The design aims at reducing the burden on teachers and pupils to prepare for national testing so that more time can be

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[21] Excluding students in grant-aided special schools
[22] The percentage of students who are enrolled in independent special schools against the total number of special school enrolment in state, grant-aided and private special schools
[23] The Scottish Survey of Achievement (SSA) is the annual national survey of pupils' attainment in the Scottish 5-14 curriculum at P3, P5, P7 and S2.

allocated to the process of learning (Burr, 2008). The government has also decided to share information with schools about learners' performance for the purpose of benchmarking but those results will not be published nationally (HMIE, 2006). The curriculum and quality indicators act as central guidance for schools to lift national achievement standards without specifying the processes and methods to allow local flexibility (Priestley, 2010). Nevertheless, these accountability measures are not accompanied with consequential actions imposed by the government if the benchmarked targets are not met in schools.

5.3.9 Conclusion

> Economic imperatives remain important and are constantly referenced, but alongside the use of education to challenge inequalities and promote fairness. The discursive shift is accomplished by foregrounding the social justice issue (ie Scotland is well-schooled but the poorest pupils do very badly) and invoking a shared idea of Scottish education (as socially just and fair) to displace its meritocratic and academic character. (Arnott & Ozga, 2009, p. 3)

Equality of opportunity still underpins Scottish educational policies and delivery, as well as a greater emphasis on improved academic standards and curricular outcomes to sustain the national economy. As student numbers in segregated settings remain fairly low and constant, additional support needs of students with mild and moderate difficulties are largely met within mainstream settings. While enrolment trends do not reveal prevalent inclusion for students with higher support needs, the attainment disparity between students from the top and bottom end of socioeconomic status in both urban and rural localities is widening. When private education and special segregated provision flourish in cities, the outlying areas with limited school choice have carried on comprehensive schooling in the mainstream environment. The triple paradox of choice, quality and inclusion has prevented the uninhibited growth of inclusive school culture based on the spirit of the ASL Act across all education authorities. The Scottish tail in PISA represents the inequity that has endured in the education system.

Nevertheless, the market model has not thrived in Scotland due to government regulatory mechanism, school inspection and commitments to national aspiration of equality but the emphasis on inclusion needs to be strengthened to obtain sustainable results. Scotland has a strong policy foundation entrenched in inclusive ideals with a fairly equitable system (OECD, 2007b) and has great potential to realise educational equity if academic disparity associated with social class can be effectively minimised.

5.4 The Micro Level: Interview Discourses

The following micro level analysis readdresses the influence of inclusion and neo-liberal agendas which have been analysed in the meso level based on the macro-level contextual data. As the data in this final level is based on individual perspectives of six policymakers (as shown in the table below), different reactions and feedbacks to the current educational practices and student support design are able to enrich the dialogue on influential discourses.

Table 5.4: Scottish interview participants profile

Date	Participant Codes	Organization	Unit	Interview Duration
3rd May 2011	S1	The Scottish Government	Education and Learning Support	44 minutes
4th May 2011	S2 & S3	Learning and Teaching Scotland[24]	International, Research and Innovation	44 minutes
4th May 2011	S4	Scottish Commissioner for Children and Young People[25]	_	59 minutes
5th May 2011	S5	Children in Scotland[26]	_	78 minutes
25th July 2011	S6	The Scottish Government	Additional Support for Learning, Learning Directorate	49 minutes

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[24] Learning and Teaching Scotland was the executive body responsible for the development of the Scottish curriculum and has merged with Her Majesty's Inspectorate for Education (HMIe) to establish Education Scotland in 2011.

[25] Scottish Commissioner for Children and Young People has the duty to evaluate policy and practice with regard to their effectiveness in protecting the rights and best interests of children and young people.

[26] Children in Scotland is the national agency representing "over 400 voluntary, statutory and professional organisations and individuals working with and for children" (CIS website). It provides two main services in relation to additional support for learning for the Scottish Government - Enquire and Resolve.

5.4.1 The Implementation Gap: Inclusive Policies, Mixed Provision and School Realities

Social democratic and equality principles are central to Scottish education policymaking. Analysis of education development in the meso level has expounded a systematic progress to incorporate inclusion in policy discourses. Based on the Warnock Report in 1978, children with additional requirements were liable to be enrolled in special schools, vocational training schools or hospitals. Since the early 80s the government has given every child equal access and opportunities for various study options. As opposed to the previous "tendency to create special schools that would cater to the needs of certain students" (S1), the government has over the last 15 years attempted to endorse mainstream learning through the Standards in Scotland's Schools and the additional support for learning Acts. The replacement of "special educational needs" with the term "additional support needs" has eradicated superficial categorisation, any circumstances which could act as a barrier to a child accessing education now calls for educational support.

Since 2007, government funding allocation was no longer ring-fenced for special education but becomes discretionary spending, allowing local authorities to allot any amount deemed necessary to cover educational support expenses according to local priorities. The revision of the *Additional Support for Learning* legislation in 2009 was an important step to give rightful entitlements to support that encompasses a greater holistic view of children's needs. In respect of making education, health and social services in the public sector to work better towards the same outcome, GIRFEC was also launched as an approach to design various services around individual children with high levels of needs. The Early Years Framework configures services that support child wellbeing from the earliest stage in order to build a good foundation for their later engagement with formal learning. Following Curriculum for Excellence, funding streams have also been set up to support "disabled students" pursuing higher education and the provision is demand-led without any specified limit. "More Choices, More Chances" is also embedded to ensure that all types of achievements and interests are acknowledged so that school drop-outs have better chance of heading for "positive destinations" such as college or employment (SEED, 2006c). Nevertheless, the data to evaluate the effects of these policies is not available to

determine whether these initiatives have actually had a positive as policy aspirations do not automatically produce the desired outcomes.

For instance, half of the interview participants (S4, S5 and S6) elaborated on a clear implementation gap in Scotland. Albeit a welfare state, Scotland is only partially committed to honour children's rights as the UNCRC (United Nations Convention on the Rights of the Child) is not yet a binding law that can be used in court cases when children's rights are breached.

> "New legislation, policy and practice should be in line with the UNCRC and other human rights treaties as an obligatory minimum standard, not some kind of aspirational gold standard." (S4)

Some "prime organisations and young disabled people, who felt really strongly, not just about school, but generally about their life in the community and so on, that there is a real degree of segregation between disabled and non-disabled children" (S4). In addition, some local authorities interpret the ASL Act "quite narrowly" (S5) which limits support only for children with obvious physical impairments. Other disadvantaged children from single-parent, low-income and benefit-dependent household, poor community areas, and possibly uneducated parents with mental health issues and alcohol abuse might be overlooked. The additional support for learning framework should be expanded to ensure all needs are equally emphasised beyond disability-related issues. Although the 2000 Standards in Scotland's Schools Act extends the right to mainstream learning to all children, on the basis of staged intervention enacted through the ASL Act; overall the UK government believes in creating a mixed provision of mainstream and special schools to provide the best support according to personal choices and family preferences.

> "Generally the presumption is that as far as possible, children are in mainstream education. But what was true then, and is true now, is that some children and parents do not want to be in mainstream education!" (S5)

S6 did not consider that Scotland has achieved greater inclusion as the percentage of children educated in special schools has remained constant at 1% for the last decade

while the number of children with complex needs has risen dramatically in the mainstream environment. Efficiency in support management is a major barrier to inclusion as there is a dilemma between gathering all children with complex needs in specialist schools for better concentrated resources even though children might have to travel long distances; or to spread those resources amongst different local schools so that the children can be alongside their peers. Mainstreaming children in rural authorities is more viable while special schools are administratively more efficient in urban areas. Most teachers are also only trained to work with the majority of kids without additional needs. Inclusion is yet an integral and critical component of schooling. The Scottish qualification for headship also does not require school principals "to spend five minutes learning about children with additional needs, or about inclusion" (S5).

Supporting children from disadvantaged background is given quite a high priority on the education agenda in terms of "political rhetoric" (S4), concrete action remains questionable. Although a lot of funds were ploughed in the 2004 ASL Act, the devolved relationship between central and local government has made education management less prescriptive, "so local authorities actually ended up spending money on things not necessarily providing support as the legislation was intending to" (S4). Educational support has not progressed as much as intended, especially in the deprived "hot spots" of Scotland with many social problems. S4 shared that the 2010 national consultation conducted by his organisation - Scotland's Commissioner for Children and Young People, which involved 10% of the child population (74,000 children), validated that "the main issue that children raised was that everybody should have the same chances in education regardless of socioeconomic status in particular". Some schools are able to send a high proportion of their students (60 – 70%) to university while others at 20% or lower.

> "While poverty as a single variable is not a particularly great predictor of greater outcomes, it is absolutely true that in Scotland, poverty co-occurs with many other factors that combine to make particularly educational outcomes less positive for a lot of children." (S5)

The Edinburgh Study of New Transitions in Crime presents strong evidence that disabled children and children with offending behaviour are more likely to be excluded. A major longitudinal study 'Growing Up in Scotland' found that incidences of disruptive behaviour were many times more prevalent among children from disadvantageous social circumstances. Over 90% of children who had been in the public care system left school without any qualifications. Many secondary school head teachers have resisted working with children seen as disruptive, aggressive and confrontational as they would affect the life chances of other well-behaved children. Hence, new guidelines from the additional support for learning framework emphasises on the reduction of exclusionary measures. Huge implementation variation within and across different local authorities is another major concern. S4 stated that "in government-speak, if you listen to ministers long enough, you might think that Getting It Right for Every Child is actually a reality across the country. I can tell you it's not!"

All the interviewees believe that pockets of good practice exist in Scotland, but generally not the general reality as yet. "What we know from our enquiry service is that inclusion – exclusion goes by many names. There are euphemisms everywhere! Things like "cool down time" and all sorts of things which are essentially exclusion" (S4). Resources have been invested as "reaction to problems that occurred, rather than anticipating them and trying to prevent them" (S5). S5 from Children in Scotland further highlighted that even though the attitudes in mainstream schools are less exclusive than they were, support is often provided too late to be effective especially since a child has been through "fifteen years of poor parenting, lack of support and lack of engagement with the education system". Scottish education system still lacks effective early intervention strategies to build the essential intellectual, social and emotional bedrock during the formative years of schooling before learning difficulties aggravate.

5.4.2 Neo-liberal Influence on the Rise

Across public policy, devolution gives schools the flexibility to deliver a service in response to the immediate needs based on professional trust. The central framework and expected outcomes are communicated to schools to ensure consistency, "but how

they arrive at those outcomes and how they achieve the particular standards, it's up to them to make the decision according to the local context" (S2). Devolution is a good way of "recognising the skill, knowledge and understanding of the trained workforce in terms of the profession of teachers, working with children at a local level and knowing them best" (S3). Accountability measures have become more transparent through school-based evaluation to promote greater sense of ownership and freedom in assessing the outcomes of children's progression. However, the central monitoring framework lacks lucid targets and the single outcome agreement which specifies achievement targets for local authorities does not enforce any line of actions to hold them accountable. Around 90-96% of the education budget is directly under the control of head teachers in many Scottish schools since the introduction of the devolved school management scheme in 1993. As academic performance is generally the major concern of parents, head teachers with the power to plan school budget might incline to deploy resources for children who are academically capable than to improve the basic literacy and numeracy skills of children who would not get any qualifications.

> "There's a fairly long tradition of school education being controlled by the local authority, and they have priorities in different places. To what extent they're actually implemented in the same way on the ground, and whether people take the same message from those different things in different places, is questionable." (S4)

The Scottish PISA outcomes are also given high consideration in the design of the new Curriculum for Excellence. It was designed to highlight individual learning benchmarks and national standards to better fit in with the global performance agenda "with attention to building learners' confidence, enterprise and a range of intelligences in order to better align schooling with knowledge economy requirements for self-managing, responsible entrepreneurs" (Arnott & Ozga, 2010, p. 345). Even with more clearly articulated standards, streaming and competitive assessments are not the common practice in Scottish schools due to the emphasis on building a comprehensive education system. Different placements occur at more senior phases of schooling as a result of academic choices that students make. High-stakes assessments occur much later in upper secondary schools which then has "a system of competition,

so grading is how the universities then identify – they use that for selection. Who's going to get a place?" (S3). The Scottish government abstains from publishing official school league tables although the press tends to circulate school achievements independently.

As large numbers of Scottish children leave schools without qualifications, the standards of the new curriculum have been elevated to enhance students' literacy and numeracy skills. Teachers constantly face "tension in terms of accountability, and raising standards, and having the time" (S3) to provide instructional differentiation. The government generally aims for equitable learning outcomes, although a balance needs to be sought between achieving inclusion and high academic performance.

> "It's very difficult to performance-manage the system and promote inclusion. To make those two systems work well together is not easy. And you can go through very complicated social statistical models to try and change things so you don't skew the system but... It's not an easy thing to do." (S6)

S5 explained that in the city of Edinburgh, the educational performance between schools varies hugely even though a consistent standard is applied during inspections based on *How Good Is Our School*. She related that as school inspection takes place every seven years, priority areas related to academic excellence are more strongly focussed while the level of inclusion, effectiveness of support systems and parental involvement could be sidelined. Inspection outcomes do not necessarily reflect the totality of a school and there is a huge variation in how important schools see social inclusion. Generally, schools tend to focus on providing services that the majority of the children's families would approve which inadvertently marginalise other disadvantaged children.

> "The HMIEs don't, and *can't* cover every aspect of a school and every detail – but even if they did, even if a school was 'excellent' for its social inclusion, and was doing maybe a kind of 'fair' in its kind of academic performance, parents would say, "Oh, well, I won't be sending my child there, I'll send one that gets 'excellent' for their academic performance and 'fair' for the kind of social inclusion bits!" (S5)

Parental choice exists in Scotland since the 80s with the introduction of placement requests although schools only have a certain level of capacity. "Parents place request to send their children to a particular school because their perception will be that that school is performing better than a neighbouring school" (S2). Schools do not usually publish school handbooks for marketing purposes other than to provide useful information to parents. Edinburgh has the highest number of private schools which enrol as many as 20% of the student population. Schools which have successfully made provision for one type of learning need gain popularity through word of mouth and flourish to become "centres of excellence" (S1) as special schools. The influx of pupils from other catchment areas to apply to schools with renowned high qualifications has led to the dramatic drop of pupil enrolment in other unpopular schools, leaving behind children who are socially excluded and those from difficult family backgrounds. The effect of parental choice has polarised particularly primary education, in terms of "who's at what school" (S1).

> "The demographic of the children in the school changes, so it's much more about concentration of children who have social needs and difficulties. So then the following year, even fewer parents want their children to go there so in the end of the day, you're just left this very residual group of very needy children." (S5)

Inclusive policy initiatives are well-established in Scotland but more effort is needed to translate that into what actually happens in schools. Rightly said, "I think we're on the right road but we're maybe not travelling down it as fast as we could be" (S5)!

5.5 Conclusion

Economic concerns are given high consideration in the development of policies but not at the expense of equal education opportunities, in fact both goals carry the same weight. Comprehensive education persists as the main policy strategy. Even though the impact of socioeconomic status on educational outcomes in Scotland is undeniable, between-school difference remains relatively low. Both inclusive and neo-liberal discourses exist in Scotland but the major difference lies in having inclusive components within neo-liberal measures, such as "More Choices, More

Chances" in the Curriculum for Excellence and the inclusion consideration as a quality indicator of "How Good Is Our School?". These could be measures which aim at striking a balance and neutralising the effects of the two agendas of emphasising "outcomes or outputs set out within the National Performance Framework" (Arnott & Ozga, 2012, p. 155) and promoting inclusion.

Providing excellent education for all remains an important aspect of the Scottish Government's policy agenda. The Government seeks to promote social inclusion by narrowing "the gap in participation between Scotland's best and worst performing regions by 2017" (Target 7 of the National Performance Framework). This indicates that Scotland is attempting to implement principles of social democracy to build a strong welfare state. Funding priorities have also centred on raising educational outcomes of students with various additional needs in the latest budget. Devolution is also implemented with accessibility strategies which specified the responsibilities of local authorities in promoting education for all. Trends like marketisation, inter-school competition and school choice are not prominent, although they still feature in policy discourse. Accountability measures are carried out without observable negative consequence on sub-standard schools, although differences between higher and lower performing schools have not been eroded and this must be seen as problematic in relation to moving towards a higher degree of social inclusion.

Even though textual and political rhetoric on inclusion remains strong, most policymakers were concerned that there is more variation and less equality on the ground. The effect of the standards-oriented curricular reform is too early to gauge, as the embedded inclusive principles and long tradition of comprehensive education might counteract such practices of performance managerialism. Policy developments in Scotland reflect shared global policy preoccupations. While Arnott and Ozga (2009) believe that Scotland inflects the themes of choice, marketisation and standards that are represented in neo-liberalism through a softer approach, Scotland has not adopted drastic managerialism approach in educational management which are more apparent in England.

Chapter Six

Finnish Case Study

6.1 Introduction

The World Bank records show that the Finnish Population has reached 5,364,000 in 2010, with 432 municipalities which range in size from 100 to 8000 inhabitants (Grubb et al., 2005). By the early 1980s, around 64% of the population reside in cities, with over 19% or 1 million in the capital Helsinki. The Index Mundi (2012) also enumerates six ethnic groups in Finland from the Finn (93.4%), Swede (5.6%), Russian (0.5%), Estonian (0.3%), Romani (0.1%) and Sami (0.1%). Migration has increased approximately 364% over the last 20 years from 26,300 in 1990 to 122,000 in 2008 (OKM, 2008c). While the major languages are Finnish and Swedish (UNESCO, 2000), the number of immigrants whose first language is not Finnish has increased threefold from 43,000 in 1992 to 128,000 in 2004 (Sahlberg, 2007). The education sector faces rising challenges to accommodate social and ethnic diversities, especially since the migration trend is predicted to further escalate as the European Union expands (Grubb et al., 2005). Finland is rapidly growing into a multi-cultural society and some urban schools are recorded to have 50% of immigrant enrolment (Sahlberg, 2007).

Finland projected GDP growth of 3.1% valued at $260.382 billion in 2011 (Global Finance, 1987-2011), ranking 19th of 110 countries with a strong knowledge economy (IMF, 2012). By diversifying export goods and innovations, Finland experienced a rapid rebound from the severe economic crisis and high unemployment rate in the early 1990s (Heikkinen & Kuusterä, 2001). From 2000 to 2010, Finland has four times topped the economy competitiveness chart by the World Economic Forum which signals a highly developed human capital and that corruption is virtually non-existent (Sahlberg, 2007). The Luxembourg Income Study (2004) reveals that Finnish poverty rate (5.4%) and child poverty level (2.8%) have remained the lowest of OECD countries. The European Group of Research on Equity of Educational Systems also crowned the Finnish education system as the most equal among European countries based on 29 inequality indicators (European Commission, 2003).

Finland reached full literacy rate as early as 1980 (Nation Master, 2008). Only 2% of the student population repeat grades and 0.3% drop out from the basic education system, which are vastly lower than other OECD and developing countries (Kupari & Välijärvi, 2005; UNESCO, 2008). The constitution of Finland spells out equality for all citizens regardless of individual differences and the right of every child to free basic education which is appropriate to their abilities and needs (UNESCO, 2000). Finland is able to reach a high state of equality through community-wide consensus on the importance of inclusion, well-being and a fair education system which promotes the educability of every child (Halinen & Järvinen, 2008). Although Finnish schools exhibit uniform high standards across the country, schools in the northern rural municipalities have a higher chance of closure, fewer academic choices and greater difficulty in the recruitment of qualified teachers (Nyyssölä, 2005).

6.2 The Macro Level: Historical Background

In 1809, Russia took over Finland from the Swedes. Special needs education from the 1840s to 1890s during Russian rule mainly catered for children with hearing, visual and physical impairments. Even when the responsibility of basic education provision was handed to the municipalities in 1866, disabled children were still excluded from schools and only some were offered privately organised instruction by charitable organisations (Tuunainen & Ihatsu, 1996). Finland gained independence in 1917 but a two-year civil war instantly dawned on the country before the parliamentary system and national constitution were formed in 1919. In 1921, the Education Act stipulated 6 years of free compulsory education for every Finnish citizen with the exception of children with intellectual disabilities (Lindstrom, 2001; Sarjala, 2001).

Nevertheless, school-age children were still streamed into two different practical and academic tracks in the 4th year of elementary education; and students in the second track further distinguished into the vocationally-oriented middle school and the academic gymnasium. Only students graduating from gymnasium could sit for the National Matriculation Examination to apply for university admission. In the history of Finnish education, Germany bore a strong influence in the initial establishment of schools for students with an intellectual disability but another major influence traces back to Sweden (Telemaki, 1979). After World War II until 1960s,

medical care and rehabilitation greatly improved which built the foundation for special education expansion in highly differentiated segregated schools with disability-homogenous groups (Halinen & Järvinen, 2008; Kivinen & Kivirauma, 1989). This parallel compulsory education system persisted until the early 1970s when the nine-year comprehensive school system was established (Kivirauma, Klemelä & Rinne, 2006).

The government guided the implementation of the comprehensive schools with a detailed national curriculum which took into account ''the individual development of each learner's unique characteristics'' (Committee on the Comprehensive School Curriculum, 1970, p. 23). This new pedagogical vision planted a seed for the development of normalisation and social integration of pupils with special support needs. Subsequently, the Comprehensive Schools Act 1983 prohibited the exemption of any child from completing compulsory education and indirectly reaffirmed the need for individual special support specified in the 1970 Act. During the period between these two Acts from 1979 to 1990, the diagnosis of various learning difficulties increased substantially which reflected a period of heavily medicalised special education with medical doctors and psychologists as professional gatekeepers (Halinen & Pietila, 2005; Tuunainen & Ihatsu, 1996). Albeit with the guarantee of compulsory education for all, students in the 7th grade were required to choose one of the three competency levels in mathematics and foreign languages and the lowest qualification level could not access studies in the gymnasium. It was only in 1985 that the streamed courses were abolished and a new comprehensive school national core curriculum was issued (Grubb et al., 2005).

Following the reform, social welfare agencies consigned the responsibility of educating children with medium and severe intellectual disabilities to educational administration (Itkonen & Jahnukainen, 2010). Before the end of 1980s, Finland had successfully ensured equal accessibility of education through the comprehensive school reform (Aho et al., 2006). A national evaluation was conducted in 1995 which aimed at reforming the organisation of special education provision, its operating culture and the joint collaboration between regional and municipal service systems. Two years later, students with the most severe intellectual disabilities were transferred from the social administration to education authorities (Itkonen & Jahnukainen,

2010). In 1998, the Basic Education Act (628/1998) was enacted to enhance equal educational rights and services for the entire school-age cohort.

6.2.1 Education Governance and the Schooling Structure

Figure 6.1 The Finnish school system
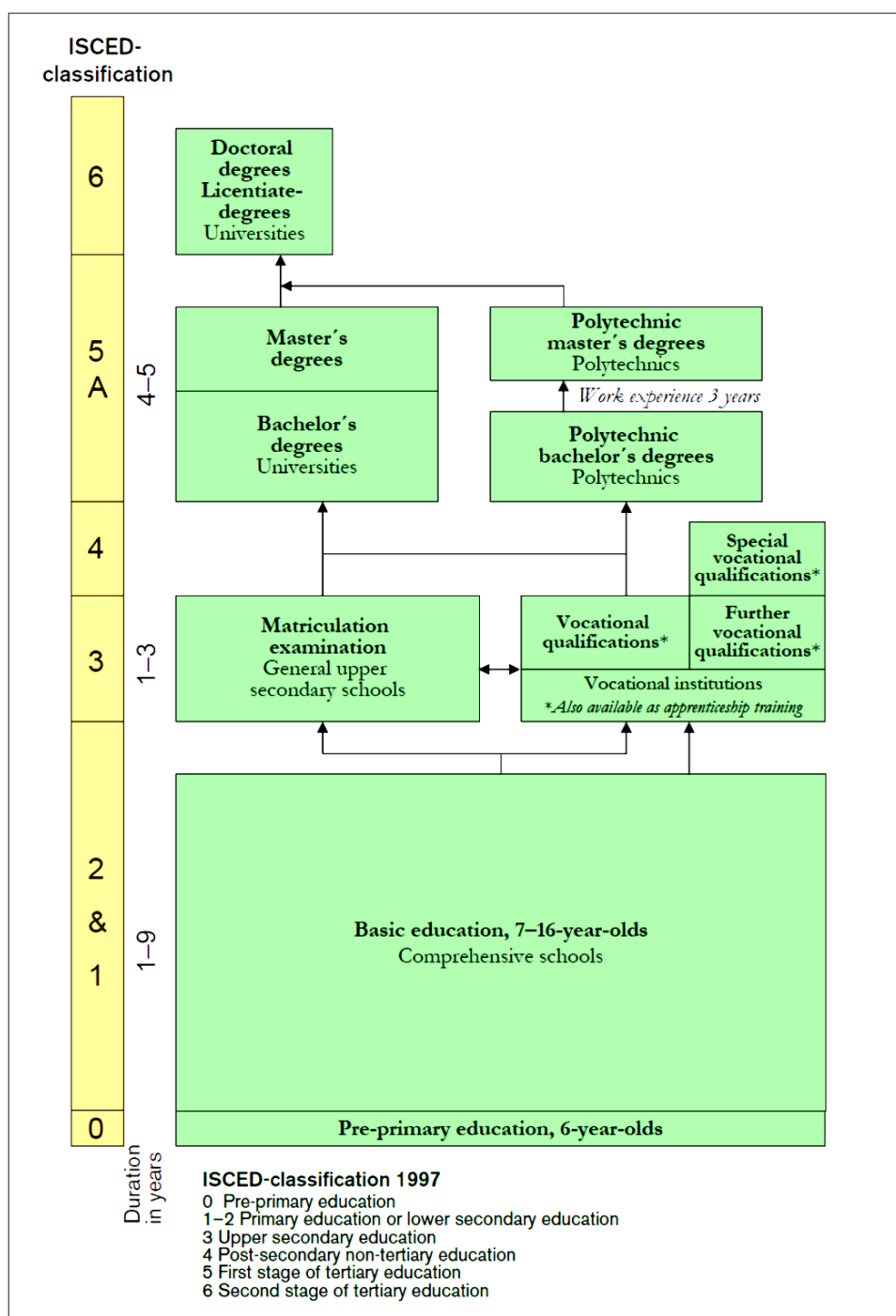
Source: Ministry of Education and Culture (OKM, 2010d)

The Finnish school system incorporates a nine-year compulsory basic education (age 7-16) followed by three to four years of upper secondary education (age 16-18). Over 96% of all children at the age of six attend a year of optional pre-primary education (Grubb et al., 2005). Students with additional needs have the option to undertake two years of preschool by starting from age 5 or by extending another year to age 7 (NBE, 2004). Halinen and Jarvinen (2008) state that over 99.5% of the student population graduate from basic education with a school-leaving certificate and proceed to general upper secondary (52%) and vocational studies (40%). A second-chance mechanism or the voluntary 10th grade is provided to students who wish to obtain better test scores and make plans for work and vocational or upper secondary studies after basic schooling (Eurydice, 2010; NBE, 2008). General upper secondary education ends with a matriculation examination from which the results are used for selection into universities and polytechnics. Flexibility is embedded within the Finnish education system to eliminate "dead-ends" and dropouts, which is exemplified by the additional 10th grade and the possibility of further studies with vocational qualifications (Grubb et al., 2005). However, merely 1 - 2% of vocational students enter universities and 15% were admitted into polytechnics in 2003, which are not promising figures. Finnish high quality basic education has been the investment focus of the government to ensure the adequacy of support structures. This accounts for one of the contributing factors in Finnish excellent achievement in PISA which will be elaborated below.

6.2.2 The Political Context and International Scene

Before 1970, Finland had set up a strong centralised system of government through uniform laws and norms which left little room for any important decisions to take place at schools (Sahlberg, 2005). State intervention, inspection and audits were a regular occurrence until the government restructured the unitary management model through a resolution in 1988 (Simola et al., 2002). Several factors led to this shift which included growing dissatisfaction over inefficient public service delivery, futile regulations, weak implementation of federal projects and time-consuming central bureaucracy (Rinne et al., 2000a, b). The transfer of power to a local level started to gain a stronger foothold and was intensified during the severe economic depression in 1990–93 when the government had to carry out educational budget cuts (Aho et al., 2006). By dowshifting decision-making to the local level in 1993, local authorities

were given the flexibility and freedom to make effective use of the reduced budget distributed according to the state subsidy system. The period between 1980 and 1990 witnessed rapid decentralisation and deregulation with the abolition of strict central administration and school inspection (Sahlberg, 2005).

Although these two decades of devolution might be perceived as a transformation influenced by the neo-liberal paradigm, the concurrent growth of professional trust in teachers and principals without greater outcome-based accountability shows a contradictory trend that is found to be conducive for individualisation of teaching approaches, effective learning and inclusive school culture (Simola, 2005; Välijärvi, Kupari, Linnakylä & Reinikainen, 2007). Countries with more school autonomy have higher average student performances in PISA (Välijärvi, Linnakylä, Kupari, Reinikainen & Arffman, 2000). An earlier OECD report (2004d) substantiates that Finnish schools and teachers are entrusted with more pedagogical independence and administrative autonomy. As educational planning in Finland is mainly based on inclusive principles, a great degree of flexibility and autonomy in local schools and municipalities are needed in order to cater for students with different needs.

The public support for a welfare state grew after World War II as the Finnish citizens across different social classes and political beliefs understood the significance of both economic stability and social equity (Aho et al., 2006). They endorsed the social system based on the Nordic democracy model by placing social duties on the elected government instead of the private sector (Antikainen, 2006; Frassinelli, 2006; Esping-Anderson, 1990). High ratings of governmental transparency in Finland, as the least corrupted nation, strengthen the democratic framework and faith in public sector governance which are crucial for a well-functioning welfare state (Heikkinen & Kuusterä, 2001). A study conducted by the Legatum Institute (2011) shows that more than three-quarters of Finns are content with their living standards as the government provides comprehensive social and healthcare benefits (Ministry of Finance, 2011). The high tax rate in Finland, which contributes to approximately 49.2% of GDP, builds a hefty source of revenue for government activities (Grubb et al., 2005). As a result, students who require additional support can be jointly assisted through interdisciplinary resources from education, social welfare and healthcare providers.

The fundamental rules and principles of Finnish education policies are established based on vast "contractual" consensus across the Ministries, Teacher Union and municipal representatives which together form the tripartite framework within the National School Council (OECD, 2003). This tripartite collaboration has contributed to the sustainability of the Finnish education system along the line of inclusion and equality as the Teacher Union has firmly resisted the adoption of neo-liberal strategies (Routti & Ylä-Anttila, 2006). Consequently, the social democratic principle underlying the education system, which upholds equity, participation, flexibility and progressiveness, has been carried on since 1968. Both left- and right-wing governments endorse access to quality education at no cost to all (Antikainen, 2006; Rinne, Kivirauma, & Lehtinen, 2004, Aho et al., 2006).

Finland also shows a high level of support for inclusive education through a few initiatives including Education for All (1990), the UNESCO Salamanca Statement and Framework for Action (1994), the Dakar Framework for Action (2000) and the United Nations Convention on the Rights of Persons with Disabilities (2006). As a member of the Nordic Council, Finland is devoted to the Nordic Roadmap towards inclusive education launched in 2008 by enhancing "good pedagogical leadership; strong student participation; well-educated teachers, who are reflective practitioners and form warm relationships with their students; and a cooperative, multi-professional approach to inclusive education" (Halinen & Järvinen, 2008, p. 93). On the other hand, Finland strives to be economically integrated into the European trade market through participation in the European Free Trade Association (EFTA), the European Economic Community (EEC), the Organisation of Economic Co-operation and Development (OECD) and the European Union.

6.2.3 Participation in International Student Assessments

Finland moved into the spotlight in 2000 when its 15-year-olds outperformed all the countries in PISA with the smallest variation in reading, mathematical and scientific literacy (OECD, 2001). Between-school differences in reading performance were also the lowest at 5% which contrasted starkly with the OECD average at 36% (Lietz, 2009). Besides having equally high-quality schools nationwide, students' performance is also relatively less affected by the family's socioeconomic status (OECD, 2004a;

Halinen, 2006a; Valijarvi, 2003; Välijärvi et al., 2007). This reflects positively on the high level of equity of the Finnish education system but at the same time raises questions about how this small nation long perceived as average in education performance was able to climb to the top.

Arinen and Karjalainen (2007) point out that Finland has shown consistent high performance in the three domains of PISA in 2000, 2003 and 2006 even though the average teaching hours spent per year are around half of the United States (570 against 1,100 hours) with very reasonable per-student expenses (OECD, 2011c). In 2006, a remarkable 20.9% of Finnish young people reached the two highest bands of excellence in scientific literacy compared to the much lower 9% OECD average (Bybee, 2009). Finland was the only nation with less than 1% of low scorers in band 1 in PISA 2006, and with the narrowest gap between high- and low-achieving students which was markedly lower than the 5.2% OECD average (Itkonen & Jahnukainen, 2007).

Table 6.1: Finland's results in PISA

Finland's Result	2000		2003		2006		2009	
	Score Points	Rank OECD	Score Points	Rank OECD	Score Points	Rank OECD	Score Points	Rank OECD
Reading literacy	546	1	543	1	547	2	536	2
Mathematical literacy	536	4	544	1	548	1	541	2
Scientific literacy	538	3	548	1	563	1	554	1

Source: OKM, 2009

With reference to the table above, Finnish students' outstanding performance in PISA assessment was repeated in 2009 although with slight decline in all areas. The share of students in the top reading scale decreased from 18% in 2000 to 15% in 2009 which showed a widened achievement gap, although still far ahead of the OECD average (OKM & FIER, 2009; Niemi, Toom & Kallioniemi, 2012). Nevertheless, Finnish students still gained the top performance in scientific literacy with a 554 mean score points, outperforming Hong Kong as well as Singapore (OKM & FIER, 2009). Although Finland had fallen one position below Korea in mathematical literacy, it still had a much more competitive edge than other OECD and Nordic countries in comparison. Denmark, Norway, Hungary and Poland who share similar social and

cultural structures fall significantly behind Finland in all four PISA assessments since 2000 (Sabel, Saxenian, Miettinen, Kristensen & Hautamaki, 2010). When Finland was ranked 1st in science and 2nd in reading and mathematics in 2009, Denmark sat around the middle of the league table of 24 participating OECD countries by taking the 20th position in science, 19th in reading and 13th in mathematics (OECD, 2010c). Overall, Finland has displayed a high standard of student performance consistently which is barely influenced by students' geographical, socioeconomic and cultural differences (Kivirauma & Ruoho, 2007). The support mechanism established to prevent school failure in Finland is one of the major factors of the PISA success which will be discussed in the following meso section.

6.2.4 Conclusion

This macro background establishes basic understanding of the broader political, socio-economic and educational context in Finland. The following meso and micro levels build on this understanding to explicate the relationship between the national and educational context, student support provision and the discourses of inclusion and neo-liberalism.

6.3 The Meso Level – Policy Development

This section presents the analysis of the Finnish policy library. Education policy documents are first examined chronologically and then thematically to derive the significant discursive trends in the Finnish education system. As this research focuses on dominant discourses influencing education policy decision-making, the analysis will show how the concept of inclusion is driving special educational change. This analysis will then be weighed with the examination of neo-liberal discourses in policy documents in order to determine which discourse has a more significant impact in the Finnish education context.

6.3.1 The Purpose of Education

The Finnish education system places fairly equal emphasis on four areas, which are learning and growth, participation in the society, preparation for work life and equity. In the Basic Education Act 628/1998 and its amendments up to year 2004, the

purposes of education include the promotion of civilisation and equality, as well as the support of pupils' holistic growth and learning in order to be righteous and skilful members of the society (Finnish Government, 1998). A similar content is reiterated in the General Upper Secondary Schools Act of 1998 which emphasises the shaping of ethical and balanced individuals in the society with the essential knowledge and skills for "further studies, working life, their personal interests and the diverse development of their personalities" (NBE, 2008, p. 8). The same objectives are redefined in the Government Decree on the General National Objectives of General Upper Secondary Education which stresses the importance of concern for other's welfare, the environmental health, societal values, as well as the adeptness in business, industry and entrepreneurship (NBE, 2008). The National Core Curriculum for Basic Education has a parallel focus:

> Basic education must provide an opportunity for diversified growth, learning, and the development of a healthy sense of self-esteem, so that students may gain the knowledge and skills they need in life, prepare for further study, and, as involved citizens, develop a democratic society. (NBE, 2004, p. 12)

The Development Plan of the Ministry of Education and Culture (2004a) centres on equal access to high-standard education for all students through the elimination of financial, demographic, socio-cultural and family-related barriers. The Ministry of Education Strategy Plan 2015 also details four key areas alike: a) securing educational and cultural equality b) promoting intellectual growth and learning c) increasing opportunities for participation and d) supporting the educational, cultural and economic competitiveness of Finnish society (OKM, 2003). It is apparent that the Finnish education objectives strive to develop all students' intellectual growth and well-being equally for their active involvement in the community and work life, which are vital for the sustenance of the welfare system and national economic stability.

6.3.2 Important Concepts in Finnish Legislation

In Finland, the term "special education" covers so many aspects which could complicate the process of data collection and analysis by the Ministry. Part-time and full-time special education are the two major types of support arrangement from pre-primary to the additional 10th year of schooling. Only the latter requires an official decision made by the school board to provide long-term educational support; while class or school teachers can determine whether a student requires temporary support through part-time special education. As transfers between part-time and full-time special education frequently occur, and a student might be enrolled in both services at a same or different time, statistics might reveal an overlapping large number of students receiving special education. Although full-time special education refers to a longer length of monitored support, it can be provided in four main educational settings which are special school, special group (special class in mainstream schools), partly-integrated and fully-integrated mainstream classrooms depending on the ability of schools to make adjustment to the learning needs of a child (Kivirauma et al., 2006; Statistics Finland, 2011). From this context, integration explains the act of bringing students into a more inclusive setting.

In recent years, the term "inclusion" has been more frequently applied in Finnish policy documents and literature. Halinen and Jarvinen (2002) understand inclusion as "the strategies, structures and operating procedures that guarantee successful learning for all students" (p.77). Inclusive education is defined as an ongoing process of eliminating obstacles of learning, implementing individual support and promoting social integration in the provision of education (Moberg, 2001; OKM, 2007; NBE, 2008). Special education is only seen as one of the means to promote inclusion, as students are proactively assisted in overcoming their learning difficulties (Halinen & Järvinen, 2008).

6.3.3 Legislation and Development of Student Support Provisions

Year	Policies	Content
1983	The Basic Education Act	All children in compulsory education
1985	The National Core Curriculum	Differentiation of teaching
1998	The Basic Education Act	Funding tied to individualised education plan (IEP); mainstreaming support
1999	The Constitution (731/1999)	The rights to support provision and personal plan
2001	Renewed Basic Education Act and Basic Education Decree	Common mainstreaming goals; the inclusion of children with severe impairments
2004	The National Core Curriculum for Basic Education	Unified nine-year basic education; inclusive strategies
2007	Special education strategy	Mainstream enrolment; intensified preventative support; the removal of remove medicalisation approach
2003-2008	The Development Plan for Education and Research	The integration of special and general education as a whole
2011	Amended Basic Education Act	Staged intervention learning support

Table 6.3: Finnish education policies

As can be seen from the table above, policy development in the last 30 years in Finland shows progressive effort to embed inclusion in the education system. The Basic Education Act 1983 prohibits the exemption of any child from compulsory education. Movement towards integration was further supported by the 1985 National Core Curriculum which emphasised the importance of instructional differentiation in accordance with the learning needs and abilities of school children. In response, the National Core Curriculum for basic education was modified in 2004 to set up a new cooperative system between the state government and municipalities in the curricular design based on autonomy, flexibility and trust. It allows the development of local municipal curriculum and school-based curriculum to promote innovation, professional judgment and responsiveness to local needs as long as they conform to the broad guidelines issued in the core curriculum (Halinen, 2006a; 2007). This three-tiered curricular management at state, municipal and school levels is very different from the top-down centralised strategy by encouraging teachers to make independent decisions regarding conducive teaching and learning arrangements for diverse

learners (Halinen et al., 2008; OECD, 2003). This reform led to collaborative teamwork, constructive professionalism, active learning pedagogies, thematic teaching and whole-school improvement towards inclusion (Halinen & Pietilä, 2005; Kartovaara 2007; NBE, 1994, p.20).

The renewed Basic Education Act 628/1998 stated that "a pupil who has moderate learning or adjustment difficulties shall be entitled to special needs education alongside with other teaching" (Finnish Government, 1998, Section 17-1; Jahnukainen & Korhonen, 2003). This Act represented the first policy initiative to de-medicalise special education as teachers could recommend support services for students while psychological or medical assessment became optional. Funding based on student placement was also replaced by unconditional additional support outlined by the new individualised education plan. Special needs education should also be provided in mainstream classes unless not feasible. Students' entitlement to support services and special aids was then reassured in the Upper Secondary Schools Act (629/1998) and the Constitution (731/1999) (NBE, 2008). An increased emphasis was placed on students' rights to adequate educational support, healthcare and social help from pre-primary to upper secondary education (Johannesson et al., 2002).

Three years later, the Basic Education Act (628/1998) and Basic Education Decree (852/1998) were revised to strengthen the cause for inclusion by incorporating students with the most severe developmental impairments into basic education (Jahnukainen & Korhonen, 2003). The revision was able to establish common goals across the nation to provide individualised instructional and welfare support to all learners (OKM, 2005). To promote smooth transition and higher retention rate, primary and secondary grades were discarded and substituted with a nine-year comprehensive basic education through the National Core Curriculum for basic education in 2004 (Halinen & Pietilä, 2005; Halinen, 2006a). The new curriculum represents a crucial tool for fostering the conception of inclusive learning through the flexibility of teaching methods, student assessment, role of active learners, individual study content, supportive learning adaptation and school organisational culture based on teamwork (Frassinelli, 2006; Halinen, 2006b; 2007; NBE, 2004). Influenced by the Education for All Movement, this core curriculum highlights the goal of equality, learner diversity and mainstreaming practice in the school community.

Previous Acts and strategies which had gradually built up the rights of students to mainstream learning and individualised support were finally consolidated in the form of a three-staged support framework in the amendment of the Basic Education Act 2011. Unlike the medical model, class teachers and school teams play a greater role in identifying early signs of learning difficulties and taking proactive actions starting from general support (NBE, 2010). General support can be provided through pedagogical differentiation, remedial teaching, part-time special education (two hours of special education per week) and teacher's aide with the adaptation of teaching methods and learning materials, personal guidance, counseling and flexible grouping (Kivirauma et al., 2006). If this does not resolve the learning difficulty, intensified or enhanced support is carried out based on a pedagogical assessment jointly prepared by a multidisciplinary team constituting school teachers, student welfare group and healthcare professionals (Sabel et al., 2010). If the first two stages of intervention fail to address the learning obstacle, a formal administrative decision is made by the school board for the child to access "special" support in line with the Administrative Procedure Act. Only children with major socio-emotional difficulties, severe mental illness and learning disabilities require this stage of support which provides them with supplementary equipment and materials as well as an individualised syllabus (Koivula, 2008; NBE, 2004). The following section discusses the recent trends where full-time special education is increasingly connected to general education.

6.3.4 Funding allocations and targeted areas

Finland ranks 34th in the world with 18.6% of GDP per capita invested in each primary school student. This amount exceeds Australia (16.8%) and Malaysia (14.2%); but far below United Kingdom (23.4%), Sweden (26.1) and Iceland (26.8%) (World Bank, 2012). The spending ratio on education escalated from 5.5% in 1990 to 8.5% in 1993 during the time of severe economic recession but has then leveled down to an average spending of 6.3% of GDP from 2000 to 2011 (Ministry of Finance, 2011; Statistics Finland, 2010b; UNICEF, 2008). Primary and secondary public schools established by the municipal authorities are funded through the state subsidy which covers approximately 57% of total educational costs and the remaining 43% comes from the local government tax revenue (Ministry of Finance, 2011; UNESCO, 2000). The government is able to maintain high system-wide education standards with

a medium proportion of funding which reveals spending efficiency and prudent targeted investment in basic education based on the preventive approach.

Since 2010, the government has replaced the sector-specific funding with a new census-based formula which allocates a lump transfer sum to each municipality for the organisation of all basic services (OKM, 2010c). Although this move increases discretionary spending at the municipal level, the subsidies for the education of pupils with a severe disability, immigrant students and 10th graders in additional education are secured in the Ministry of Education administrative sector (OKM, 2010c). Based on the principle of a welfare state, annual federal block grants are additionally earmarked for education and social services so that school teams can call on different types of resource needs (Itkonen & Jahnukainen, 2010). Other forms of learning difficulties are not diagnosed to attract additional funding but are identified to provide individualised support using the general budget. The federal government also harmonises resource grants to reduce financial gap between more affluent and poorer municipalities so that all schools can deliver good learning experiences (Grubb et al., 2005).

Table 6.2: Educational budget by type of expenditure 2008

Type of Expenditure	Euro (million)	%
Pre-primary education	294	2.8
Comprehensive school education	3,889	36.5
Upper secondary general education	665	6.2
Vocational education	1,436	13.5
Apprenticeship training	212	2.0
Polytechnic education	834	7.8
University education and research	1,925	18.1
Other education	414	3.9
Administration	218	2.0
Financial aid for students	768	7.2
Total	10,655	100.0

Source: Statistics Finland, 2010a

In 2008, the delivery of comprehensive school education accounted for the largest portion of education spending followed by university education, research and

vocational education. This shows the Finnish commitment to providing high-quality basic education with effective use of funds concentrating on early support structures, which will be discussed in the section of enrolment trend below. In preschool and basic education, study materials, meal, healthcare, student welfare, support services, transportation, school activities and even accommodation are provided absolutely free to all students to ensure equal opportunity to schooling (Halinen & Järvinen, 2008). In the last decade, funding given to special educational services had also increased by 40 – 50% (Aho et al., 2006) while an additional 65 million Euros were allocated to the *Perusopetus paremmaksi* (Towards improving the quality of basic education) program which aimed at reducing class sizes and consolidating support services to students with a foreign mother tongue (OKM, 2010c). The government saves on costly monitoring measures and large cohort testing in order to focus input on student support, teacher training and equity initiatives.

6.3.5 Enrolment Trends

Kivirauma and Ruoho (2007) explain that special education in Finland is organised in two forms on a part-time and full-time basis which function according to different principles and should be analysed as separate systems. Part-time special education is used to overcome temporary learning difficulties with intensive pedagogical interventions while full-time special education requires official decision in writing to be eligible for long-term special support (Kivirauma & Ruoho, 2007).

Table 6.4: Pupils transferred to special education in Finland according to educational settings

Year	Full-time Special Education									Part-time Special Education	
	Special School		Special Group		Partly Integrated		Fully Integrated		Total (%)		
	No. of students	% all students	No. of students	% all students	No. of students	% all students	No. of students	% all students		No. of students	% all students
1995	-	-	-	-	-	-	-	-	-	88224	15.0
1998	12002	2.0	7972	1.4	1852	0.3	-	-	3.7	-	-
2001	11200	1.9	9377	1.6	5602	0.9	4653	0.8	5.2	-	-
2002	10900	1.8	10866	1.8	6190	1.0	6061	1.0	5.6	119471	20.0
2003	10029	1.7	12147	2.0	7439	1.3	7224	1.2	6.2	-	-
2006	7745	1.5	15214	2.6	10959	1.9	12169	2.1	8.1	128600	22.2
2008	6782	1.2	14574	2.6	11188	2.0	12866	2.3	8.1	-	-
2009	7089	1.3	40079/ 7.2%						8.5	128700	23.3
2010	6406	1.2	15156	2.8	11273	2.1	13875	2.5	8.6	-	-
+/-	1998- 2010	-40.0%	1998- 2010	+100%	1998- 2010	+600%	2001- 2010	+213%	+132%	1995-2009	+55.3%

As shown in the table above, between 1995 and 2010, the number of students transferred to full-time special education proliferated at least 132% from 3.7% of the school population to 8.6%. While in 1998 55% of full-time special education students were enrolled in special schools, in 2010, more than half of the pupils were fully (29.7%) or partly integrated (24.1%) into mainstream education. Only 32.4% received instructions in special groups and a much lower 13.7% attended special schools. Of all school-aged children in 2010, full-time special education comprised about 1.2% of students with severe disabilities in special schools, and another 7.4% with milder disabilities were integrated into mainstream schools. The greatest growth can clearly be seen in the number of completely and partly integrated special education pupils, which have increased threefold and sevenfold respectively in the span of ten years (2001-2010). The number of students grouped in special classes has also doubled in 12 years but has experienced the lowest growth rate relative to the inflation of partly and fully integrated student population. The share of the group receiving part-time special education has equally increased from 15% in 1995 to 23.3% in 2009, which is significantly higher than the 8.5% full-time special education enrolment in 2009.

Figure 6.2: Full-time special education enrolment trend 1998 - 2010
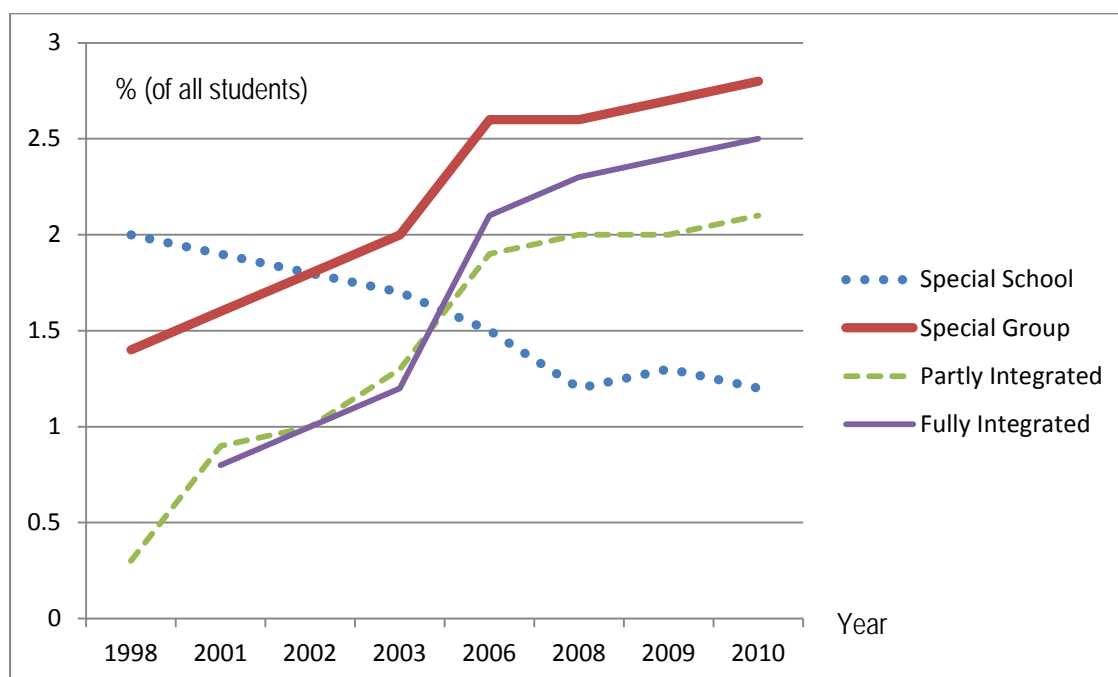
Following the mainstreaming principle of Basic Education Act 1998, there were still a large number of 12002 students or 2% of the student population enrolled in special schools. Graham and Jahnukainen (2011) explain that this group comprised students who were previously excluded from comprehensive schools, as well as those with profound intellectual disabilities who were transferred from the authorities of social services into education. The chart also shows the consistent decline of special school enrolment in contrast with the expanding numbers of the other three support arrangements of full-time special education. The shift towards more integrated and inclusive forms of support arrangement in special education is evident since 1998. Throughout the years, preventative measures of school failure and the obligation of support provision have been increasingly emphasised in the Finnish education system. This explicates the rising trend of both full-time and part-time special education diagnosis, notably the sudden growth between 2004 and 2006 following the introduction of the National Core Curriculum. It highlighted inclusive strategies through early identification and remedial intervention of support needs in mainstream setting. From 2006, fully-integrated support placements have since exceeded partial integration which again validates the endorsement of inclusion in Finland.

Even though the huge volume of students in part-time special education projects an elevated special education enrolment figure in world standards, in fact the amount of segregated provision is quite low (OECD, 2000; Vislie, 2003). As opposed to the exclusive special school policy, this part-time remedial support has successfully mitigated the medicalisation stigma of special education in line with normalisation principles (Kivirauma et al., 2006). Approximately 70% of this service is offered to students who encounter language learning difficulties in the first three grades of elementary schooling in order to promote successful learning in higher grades (Itkonen & Jahnukainen, 2010). The rest caters for students from grades 7 through 9 to facilitate smooth transition to upper secondary schools (Itkonen & Jahnukainen, 2010). Nevertheless, municipal autonomy in education has resulted in some variations of policy implementation (Sabel et al., 2010). In 2009, the share of pupils in full-time special education ranged from 10.5% in the region of Päijät-Häme to only 3% in Åland. Åland also did not provide any part-time special education compared to 27% in Etelä-Savo (Statistics Finland, 2011).

6.3.6 Reflecting on Policy Development

The process of inclusion in Finland is unique in the sense of the role played by the part-time remedial education in carrying out early intervention to accommodate diverse needs of all children in mainstream setting during basic education (Kivirauma & Ruoho, 2007). It was first designed during the construction of the nine-year universal basic education in 1968 to tackle the sudden surge of students with very different academic abilities. This student support mechanism has since carried on in providing intensive but temporary support with the aim of keeping all students in regular education. This directly contributes to the inclusiveness of Finnish education system and is reputed to be a vital factor behind the excellent PISA results (Grubb 2007; Koivula, 2008; OECD, 2005). As teachers' professional judgment is used to determine any academic difficulty instead of formal assessment tools, diagnostic labels are greatly reduced.

Inclusion is fulfilled through this model as a flexible learning environment is installed and individualised support is provided in time to prevent entrenched learning difficulties that develop into diagnosed disabilities (Itkonen & Jahnukainen, 2007). Even for most students with severe visual, hearing and physical impairments or other disorders, municipalities have to abide by legal responsibilities to arrange educational placements in mainstream classes or schools unless these settings are clearly unbeneficial to their development (Jahnukainen & Korhonen, 2003; NBE, 2002). As support on the whole concentrates on basic education, the development plan for 2003-08 has planned to take required legislative measures to improve support provision in general upper secondary education (Grubb et al., 2005).

6.3.7 Neo-liberal Influence

Global financial insecurities have exerted a deep influence on the policies of Finnish government since 2008 (OKM, 2008a). Enhancing competitiveness and safeguarding welfare provision are underlined equally in the Strategy 2020 which takes into account socio-cultural, global and workforce trends in the new operating environment (OKM, 2010a). An increased emphasis is given to fostering a closer connection between working life and educational process (OKM, 2008b). In addition, management by targets has been adopted as one of the 2015 strategic key areas of the

Ministry. The following sections will examine the state of Finnish education policy and practice in the neo-liberal era.

a) High-stakes Assessment and Streaming

As educational equality is a leading principle of Finnish education, national tests and internal streaming do not occur in the nine years of comprehensive education. The World Health Organisation (2004) finds that Finnish students are the least burdened by homework and stress in schools. Given that academic grading is proscribed, school-based descriptive assessments are employed by class teachers for individualised student development and instructional improvement. As a result, it is able to create a healthy environment which diverts from high-stakes examinations and school league tables and instead focuses on the learning process (Heikkinen & Kuusterä, 2001). Selective streaming and tracking only take place during the transition to upper secondary education when good academic records are crucial to secure a place in the general or vocational upper secondary schools that students apply to. In urban areas, competition to gain admission into specialised upper secondary schools has intensified. Nevertheless, both general and vocational lines of studies qualify for university studies although only students enrolled in general education have to sit for the Matriculation Examination at the end of upper secondary school. It is the only standardised testing administered in Finland as an entrance examination to tertiary institutions.

b) School-choice Policies

The Basic Education Act of 1998 gives parents the right to choose schools but first priority must be given to children in the local catchment area (Ylonen, 2009). School choice opportunities are very limited in practice as diversity of basic education provision remains low, so is the number of partially selective specialised upper secondary schools. The common practice is local school enrolment which is the only alternative for families living in sparsely populated countryside (Nyyssölä, 2004). Even in the capital Helsinki, only 14% of primary school children and 40% of upper secondary students are not enrolled in their nearest school (Aho et al., 2006). The government has made the intention of discouraging school choice very clear in its

policies including stopping financial contribution to schools which exceed the optimum enrolment capacity as well as removing free transportation services for children who attend schools outside their local areas. Along with those policies which hamper school choice, between-school differences in terms of educational outcomes are so negligible that local schools become the most reasonable choice (Graham & Jahnukainen, 2011). Private school enrolment rates are among the lowest in the world at only 2% of all school-aged children (Halinen & Järvinen, 2008). Central allocations to private providers only constitute approximately 2.2% of total educational expenditures compared to a much higher OECD average of 11.6% (Aho et al., 2006). A lot of restrictions are also placed on private schools as they have to adhere to central curricular guidance, equity strategies and free basic education provision.

c) Accountability and Benchmarks

The Finnish curricular reforms in 1994 led to the decentralisation of power to the local level, deregulation and the abolition of school inspection by the 11 Provincial State Offices (Aho et al., 2006). Educational administration has since been restructured into a form of soft centralised steering with high degree of local autonomy in policy implementation. The government steers local activities through the core national curricula, development plan, legislations and other policy documents (Sahlberg, 2005). A trust-based relationship between the state, municipalities and schools has long replaced the strict accountability practice which gears towards uniformity. This culture of trust and loose accountability policies are able to gain traction due to the highly respectable professionalism of Finnish teachers who all hold a master's qualification (NBE, 2007; 2008).

In place of monitoring, school-based evaluation is used as well as an external sample-based evaluation conducted by the National Board of Education (OKM, 2004a). The Board collects a national sample of student learning outcomes in a subject from a random selection of schools. The results are used for evaluating national standards and informing future educational policymaking while performance ranking and sanctions are avoided (Halinen, 2006b; NBE, 2004; Sahlberg, 2005). Since 2006, elements of performative competition have been introduced to vocational education where government funding is tied to quality indicators such as low dropout

rate, number of highly qualified teachers and graduates' employability (OKM, 2006); but in no other areas such outcome-based allocation is observed.

6.3.8 Conclusion

Finland has shown successful resistance to global neo-liberal reform trends by diverting from the accountability practices of standardised testing and rigorous school inspection. Instead, a high level of trust in teachers' professionalism has been preserved to carry out individualised teaching and student assessments, which has met with considerable success as variation in school performance under 5% is the lowest among OECD countries (Itkonen & Jahnukainen, 2007).

6.4 The Micro Level: Interview Discourses

The following micro level analysis readdresses the influence of inclusion and neo-liberal agendas which have been analysed in the meso level. The contextual data which were elaborated in the macro level provides the groundwork for readers to understand the issues in the subsequent levels. The issues are also discussed at the policy-making level through the voice of Finnish policymakers. As the data in this final level is based on individual perspectives of five policymakers (as shown in the table below), different reactions and feedbacks to the current educational practices and student support design are able to enrich the dialogue on influential discourses. Interpretation of the discourses is also made to relate the data to the research questions.

Table 6.5 Finnish interview participants profile

Date	Participant Codes	Organization	Unit	Interview Duration
1st April 2011	F1	Finnish National Board of Education	International Relations	58 minutes
5th April 2011	F2	Ministry of Education and Culture	Department of Education and Science Policy	52 minutes
6th April 2011	F3	Finnish National Board of Education	Curriculum Development Unit	66 minutes
8th April 2011	F4	Finnish National Board of Education	General Education Department and Curriculum Development Unit	83 minutes
8th April 2011	F5	Ministry of Education and Culture	Department for Education and Science Policy	72 minutes

6.4.1 The Dissolution of the Institution-based Medical Model

Discourses related to the medical model of special education are relatively minimal as Finland has long abandoned the use of disability categories and has adopted the umbrella category of "special education needs" with the rationale that learning problems can never be effectively named. Finland has transformed from the medical model to the pedagogical model, by assessing the needs of pupils holistically on an instructional basis, including the most suitable support and how to build on their strengths. F3 from the Curriculum Development Unit further elaborated that the list of "many definitions for pupils with special needs" has been similarly reduced. In 1977, the educational management of hospitalised children was also transferred to the Ministry of Education from the Ministry of Social Affairs and Health so that their educational rights can be better looked after (OKM, 2004b). Legislation concerning official decisions made for pupils with special support needs no longer contain medical or psychological statements. Students only partake in psychological or medical assessments upon recommendation by teachers during pedagogical evaluation. These assessments are not the "first thing that is done" (F3). School psychologists spend more time conducting in-class observation, working with pupils with learning difficulties and giving advice to class teachers than conducting time-consuming assessment tests based on psycho-medical evaluation.

In addition, Finland has just reformed the state subsidiary system for basic education in 2010 with regard to the amount of funding schools and municipalities could obtain from the central government. The government has discontinued the allocation of extra funding to schools based on the number of pupils registered with special needs, with exemption for students with the highest support needs. This funding mechanism functions independent of student placement by distributing the same amount to enrolment in mainstream and special schools. The decoupling of funding from special needs diagnosis has successfully deincentivised schools to put a disability label on students. Even though Finland has not achieved full inclusion, the amount of fully or partly integrated special needs students, as well as students enrolled in part-time special education and special groups in the mainstream setting, cover more than 95.6% of special education placements. Hence, in the light of such a small amount of special school enrolment (1.2%), the institutionalisation or medicalisation of special education is at a very low level of occurrence.

6.4.2 Inclusion as the Ingrained Mindset in Society and Political Practice

On the contrary, inclusive discourses highlight the dominance of the education support model and equity priorities in the Finnish system as words such as "needs", "include", "integrate" and "individualise" are used unprompted in almost every topic of conversation. This discourse pattern reflects that equity and equality are the keywords in Finnish education policymaking which is characterised as "meant for all", "inclusive", "coherent" and "comprehensive" (F3). The most important aim is "equity, equality and high quality at the same time" in education as well as other sectors in the society. F5 concisely described the main principle of the ministry, "if you are poor, you must be supported; if you are a slow learner, you must be supported. Equity is understood like that in Finland". Individual well-being in society is the political principle of the nation so that everybody has a good start in life, with equal opportunities to access a free, high quality education irrespective of family backgrounds.

This form of societal unity extends to the internal management of the Ministry and the National Board of Education where no "special education" unit or office exists. The former unit which dealt with special needs education in a segregative

manner was abolished in 1997 and this duty is assigned to all education policymakers in the Ministry. The general teacher education also takes into account the fact that pupils are different; hence inclusive methods are introduced as an important element of the pedagogical training. The current National Guidelines for Education do not have separate sections distinguishing regular and special education. Teachers in the field of special education are bound by the same educational guidelines, but are also given the authority to modify courses to a greater extent for children with severe learning problems. Even when such a situation presents itself, teachers would not regard the child any differently than the others.

> "They are different, but they are just children." (F5)

> "We have normal children and then we have special children, not like that, but we are *all* special." (F2)

6.4.3 Towards Inclusive Education in Finland

A change in the Basic Education Law took place in 2010 which has strengthened the students' right to obtain individual support. The change was consistent with the long-ingrained practice of providing individual support in the comprehensive school system from the 70s. Schools are legally bound to offer immediate support once students demonstrate any additional need in learning. This newly enforced law builds a strong platform for inclusive education "because it means that every child can learn in the same school – no stream, no tracking is needed" (F3). The national core curriculum has also been modified since 1985 to reduce specifications on learning content in order to enable instructional flexibility and to integrate different subjects to make learning more holistic from the point of view of children. Drafted with the recommendations from all levels of society, the design breaks down curricular barrier to set the same set of goals of learning for all children of varied intellectual abilities.

The concept of inclusive education has also gained a strong foothold in Finnish education which strengthens the concept that "every student has a right to go to the nearest school, to get support every day and to be successful in studies", as explained by F3. The integration movement has also met with great success when most "special education children are integrated to so-called mainstream classes or

special education classes that are located in mainstream schools, so that this kind of integrative cooperation between special needs children and other children is possible" (F3). For more than fifteen years, Finland has been making huge changes to its former strong tradition of segregated specialist education due to the influence of inclusive education ideologies. The state-owned special schools which accommodate the most severe cases of physical, visual and hearing impairments have been converted to resource centres. The whole country currently only has 134 special schools which is less than half of the amount of 269 a decade ago. They mainly serve as hubs for sharing teaching materials, in-service training, special equipment, pedagogical innovation and therapy sessions for students from local schools for a few days to two weeks.

> The special classes are in mainstream schools and the pupils are very much integrated in the mainstream class activities. They usually have their own class, and then the sister class. But then there are special classes for the multihandicapped who need personal assistance for almost all the time, and I think for these children...we have also integrated, wholly inclusive settings for these children, they are under the same roof and have the same school happenings together. So there are their own special classes, but I don't see that it's so much segregated if they are all the time communicating with other children and being around them. (F4)

From 2008 to 2010, the debates against mainstreaming initiated by the special education interest groups have failed and consequently the core curriculum specifies that segregated special school placement can only be justified "only in the case that it couldn't be arranged in the mainstream" (F4). The main consideration is always the best interests of the child and the lack of resources is not an acceptable excuse. The Basic Education Act also obliges children's participation in determining their own education during important hearings and the core curriculum also states that they must play a part in setting the school culture, plans and daily activities. Moreover, Finland has already undersigned the UN conventions to endorse inclusion formally, hence F4 asserted that special education is "not important", "not the point" and "not so much discussed anymore".

Other positive aspects of the education system are the emphasis on individual support, early intervention, active role of student and healthy student-teacher relationship. Pupil support was formerly known as special needs education but the terms have changed into general, intensified and special support. These three tiers of support account for the increase of special provision as more and more children in recent years "have been supported in some way, but not always at the highest level" (F3). Educational support is inclusively orientated as students can remain in the mainstream class to receive guidance or in smaller groups for a temporary or longer period of time. Of the 30% of pupils who have participated in remedial teaching, only about 6% suffer from major learning difficulties. The multi-professional student welfare group makes a concerted effort to improve the well-being and inclusiveness of the whole school community, especially when class teachers forward a child's learning issues for group discussion.

On the other hand, qualified specialised teachers who have furthered studies into support methods after completion of their primary school teacher diploma are entrusted to implement part-time special education. Almost 30% of those who are starting school are given this form of support during the school day, "to give a firm basis for the key knowledges" (F4). These extensive, immediate and flexible forms of learning support have succeeded in reducing school dropout, academic failure originating from disadvantaged socio-economic or immigrant background as well as other general learning problems. Although segregated settings still exist as per the legislation, F2 from the Ministry of Education and Culture stressed that "I think the development is going forward (towards inclusion), and we are not so much anymore arguing in this respect", signifying consensus across various stakeholders. At the moment, the Ministry is still trying to change the current model which still has "special groups" towards the practice of true inclusionist ideals where "all the students go to the nearest school" (F4).

PISA has strengthened their self-confidence that the emphasis on equity and access in the Finnish system has borne results, "because we have seen from PISA that this is the right way" (F4)! The high quality support speaks for itself when 5-10% of the Finnish students situated at the lowest achievement band in PISA perform better than the OECD average. "The best school is the nearest school" holds true in Finland when differences between schools are small.

"The biggest benefit in our system is that you can put your child in whichever school and you can be sure that the teaching is good, because the differences between schools, they are very, very small. (F1)"

6.4.4 The Resistance of Market-led Strategies

The top-down central guidance given to municipalities and schools in Finland has been generalised in content in the last decade to allow for flexibility for modification to suit local needs. The main steering of education objectives comes from the four-year national development plan for education. This light and flexible education governance is in fact economically efficient as the money is not spent on inspection and bureaucratic administration but directed at improving education provision. Even without having a monitoring system, F3 affirmed that the central government "know quite well what is happening on the field because we interact so much".

"Our system is very non-bureaucratic; the administration layer at the national level and at the municipal level is quite thin. It's not heavy, it's not bureaucratic, it's not controlling" (F3).

The foundation underlying the practice of autonomy and decentralisation is based on cooperation, interaction, professional trust and support as opposed to public accountability, results-based distant steering and high-stakes testing. The high level of input by the government in creating good preconditions for educational success is vastly different from other countries which rather set up control mechanisms to achieve their educational objectives. Once again, the good quality of teacher education is a requisite to implement this form of decentralised curriculum as the teachers need to have the competence to make decisions independently.

"I believe that it is embedded in the human nature that if you feel that you are trusted and supported, you do better than if you feel that someone is standing behind your neck and controlling all the time, and you will become anxious." (F3)

There is only one matriculation examination taken by students at the age of eighteen at the end of the general upper secondary education. It is at that point that there is

some competition between students and schools when the average score recorded in the certificate is the determining factor of the selection process into separate institutions. This procedure aims at selecting the students most suitable for the available courses but overall high stakes assessment is absent in the whole schooling system. Instead, a random sampling assessment is conducted annually to know the overall academic standard in the country and to determine whether curricular objectives have been met. F1 from the International Relations Unit of the Finnish National Board of Education opined that concentrated allocation of funding into essential areas such as teacher training and comprehensive education have garnered effective returns, as interpreted by the Finnish remarkable accomplishment in PISA, as valuable resources are not frittered away into costly national examinations and vague inspection procedures.

> "We can use that money in other ways, because we have national core curricula. We have competent teachers. Why should we also make very expensive testing?" (F1)

> "When there is so much international cooperation and pressure for this harmonisation of education system – it's a new kind of pressure to change our system towards the same direction... so we don't need these whole age cohort testing because we don't want to put our schools into order, into ranking... If we start creating league tables of our schools, then we have really lost something very, very valuable." (F3)

Finland is frequently pressured to conform to the competitive student evaluation approach which it has adamantly resisted to prevent inflicting stress upon students and teachers. F5 disagreed with the equally high-performing Korean education system which determines achievement strictly based on test results and which pressurises the students to "work so much harder", "study in the weekend" and "do not get enough rest". Finland is able to produce good results with minimal school day hours compared to the Asian countries where parents need to pay extensively for extra tuition. Finnish education aims to construct a balance between good national academic achievement and also healthy socio-emotional well-being of students. The passion for knowledge is intrinsic to the culture imbued within the Finnish pupils.

Speaking from experience, F5 said that the rigid tests create a much more mechanistic way of learning which are especially harmful for children who have learning difficulties as they need different kind of support and learning method. Failing such tests would cause distrust on their own learning and loss of motivation.

With the strict condition that the results cannot be published, municipalities can purchase the test results to know their standing among other schools which are named anonymously. F5 remarked that it is important to avoid parents choosing schools for their children if the results are made available to public. School choice is only limited in the area of Helsinki at the academic upper secondary level which is also minimal as parents usually choose the nearest neighbourhood school for the social interest of the child. There are also limitations on the commercialisation of the education sector in Finland based on the constitution which strictly regulates for free basic education. Private schools require permission from the government to run their annual projects as funding is sourced from the government and the municipalities. Tuition fees are not allowed to be imposed on students.

The government is aware of the importance of constructing relevant school systems which conform to the needs of the future work market through inter-sector collaboration as specified in the Strategy 2020 development plan. The goal to maintain economic competitiveness in Finland does not contradict the ministerial effort in striving for equality and inclusion. By ensuring that everyone's needs are met, school dropout is effectively kept at a minimum rate "who can all fulfil the needs of the work sector [in order to achieve true] 'cohesion'." (F5)

6.5 Conclusion

Finnish educational policy rhetoric is rich with a social democratic discourse with egalitarian values as the common vision of the whole community. As a result, the administrative governance and the schooling structure of the whole system mirror an inclusive orientation that does not put equal learning outcomes secondary to high performance standards. The proactive support intervention in basic education has played an important role in resolving learning difficulties at an early stage and mainstreaming students with varied levels of abilities. Support provision is not associated with the stigma of disability, medical diagnosis and institutionalisation of special education; but constructed as a form of individualised learning intervention to keep students on track in regular education. All children regardless of individual backgrounds and shortcomings are perceived as having great potential to reach educational and social fulfilment. Finnish equity and excellence are evidenced in the consecutive PISA reports with one of the highest mean score in all domains as well as low variances between schools and pupils' socio-economic status.

The devolution of school administration is not inspired by neo-liberal managerialism but to enable a flexible and enriching educational process free from the pressure of national testing and school ranking. With a soft-steering accountability system, schools and teachers are confidently trusted to possess the ability of designing school-based curriculum and pedagogic modifications to address learning needs of diverse learners effectively. Finland has so far rejected market-like mechanisms by creating equally good neighbourhood schools. As Finnish comprehensive schools project both excellence and equality at the same time, it shows that inclusive schooling is not a myth but realisable through preventing the difficulties experienced by at-risk students from developing into entrenched disabilities.

Chapter Seven

Malaysian Case Study

7.1 Introduction

Malaysia is a federation made up of 13 states which consists of East Malaysia and Peninsular/ West Malaysia in South-east Asia. It has a multi-ethnic and pluri-cultural society which is composed of the Malay/*bumiputera* (50.4%), Chinese (23.7%), Aborigines/ *orang asli* (11.0%), Indian (7.1%) and others (7.8%) (The Central Intelligence Agency, 2010). As a developing country, its average economic growth rate was recorded at 6.2% per annum from 1991 to 2005, even though Malaysia was severely affected by the regional financial crisis from 1997 to 1998 (Karimi & Yusof, forthcoming; MoE, 2008a). The World Bank Education Statistics also reveal that 77% of the Malaysian workforce is educated only up to upper secondary level with merely 28% in higher-skilled employment in 2011 (Economic Planning Unit, 2010). Compared to countries like Australia (42.9%), Finland (43.8%) and the United Kingdom (42.5%), there is still a large gap which Malaysia needs to close to build a highly skilled labour force to support the expanding knowledge-based economy.

More than 92% of Malaysians are literate since 2005 and universal primary education has been maintained since 1990 (UNDP, 2005). Inconsistent with these positive developments in Malaysia, disability is still largely perceived in the light of abnormality, so much so that most interaction with the handicapped is based on sympathy. The public facilities are not designed for the convenience of disabled people who consequently seldom mingle in society on public transport or at other communal localities. Even though the incidence of hardcore poverty (a household of four with a monthly income less than RM500) in Malaysia was estimated at 4.5% in 2002, the figure excluded the OKU (handicapped persons) who are concentrated in the poor sector of the society as "beggars" according to the Destitute Persons Act 1977 (FAO, 2004). In 2008, 220,000 disabled persons were registered with the Malaysian Community Welfare Department to receive welfare support due to unemployment. They are largely seen as "an underclass without chance of escaping from the poverty trap" (Jayasooria, Krishnan & Ooi, p. 456). Even though social

benefits have increased for this population, much needs to be done to create a disability-friendly environment in Malaysia (Adnan & Hafiz, 2001).

7.2 The Macro Level: Historical Background

Malaysia was first colonised by the Portuguese (1511-1641), followed by the Dutch (1641-1824) and the British (1824-1942). The massive immigration of Chinese and Indian workers was initiated by the British to meet the high demand for manpower in the booming tin and rubber industry. The permanent settlement of these two ethnicities in the country has added a rich culture to the Malayan landscape. The present education system is the outcome of a long process of policy negotiations between different ethnic groups so that a harmonious and united nation can be built (Lee, 1997; Musa, 2003). After the Second World War (1941–1946), the British worked with the locals to structure a unified education system to the satisfaction of the three major ethnic groups.

The Razak Report 1956 introduced Malay as the national language and as a compulsory subject in primary schools (Musa, 2003). The proposal allowed the establishment of Chinese and Indian primary schools with the condition of using the national syllabus. That was the start of a more integrated and cohesive education system which led to the formulation of the National Educational Policy (UNDP, 2004). Since then, primary schools have consisted of the national (Malay as the medium of instruction) and national-type schools (English, Chinese and Tamil); while English and Chinese secondary schools became national-type secondary schools (Musa, 2003; Ong, 2010). In 1968, the English-medium national-type schools were gradually reformed into national Malay-medium schools. The conversion spread to the secondary level and was finalised by 1980 when the Malaysian Certificate of Education examination was conducted only in Malay (MoE, 1985).

Even though democracy and national syllabus were established, some inter-ethnic tension remained. When the national election ended with a tie between the Chinese opposition party and the Malay Alliance government, widespread anger was sparked among the two communities during their celebratory parades, leading to a deadly riot on May 13th, 1969. The riot had a significant effect on education policymaking as the political leaders believed that education must be used to

restructure the imbalance of wealth distribution among the three races as a result of the British ruling system (Brown, 2007). The polarity of ethnic groups was aggravated by the 'tri-ethnic schema' set by the British where the Malays were systematically arranged to work in the paddy fields, the Indians as rubber tappers and the Chinese either as businessman or tin miners (Jamil, 2010). The National Economic Policy (NEP) was implemented in 1970 to amend the situation by exercising greater state intervention in increasing the intakes and quotas for the *Bumiputeras* (Malay and indigenous groups) in education programs, governmental employment and economic ventures (Fadzel, 2005). To strengthen a sense of patriotism and national unity, the national ideology (*Rukunegara*) was also legislated in 1970 which aims to foster harmony within a multicultural Malaysian populace.

7.2.1 Education Governance and the Schooling Structure

Article 12(1) of the Federal Constitution of Malaysia pledges the right of education for all, and the government thus provides 6 years of free compulsory primary schooling and an additional 5 years of free, non-compulsory basic education in secondary schools (MoE, 2000; Ong, 2010; Veloo Pillay, 2009). It is spread out to four phases from six years of primary education to three years of lower secondary education, two years of upper secondary education and another two years of pre-university form 6 or matriculation program (See figure 7.1 below). Students in national (*Sekolah Kebangsaan*) and national-type vernacular schools (*Sekolah Jenis Kebangsaan* Chinese or Tamil) conform to the same stages of education, national curriculum and standardised public examinations (Musa, 2003; UNDP, 2004). The first examination known as the Level One Assessment or PTS is taken in the third year of primary schooling to distinguish the fast learners who are allowed to skip the following year of primary schooling and are promoted to year 5 directly. In the final year, they are required to sit for the Primary School Achievement Test or UPSR but regardless of the result; students proceed to form 1 at the secondary level. Before the year 1993, students who could not attain grade A in the Malay subject in all types of schools were required to study an additional preparatory year in "remove" classes to ensure mastery of the language before transitioning to lower secondary schools.

Figure 7.1: The education and assessment structure
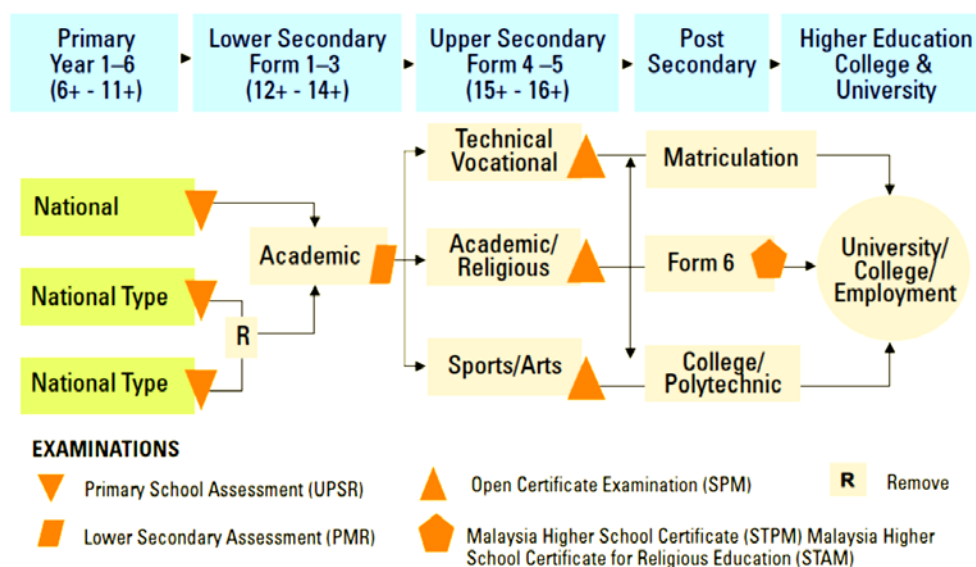
Source: MoE (2008)

At the end of the lower secondary education, students face another national examination called the Lower Secondary Assessment or PMR and are then streamed into Science, Arts, technical or vocational strands at upper secondary level (MoE, 2007). Students are then prepared for the Malaysian Certificate of Education or SPM in form 5 of upper secondary education. Based on the results, Chinese and Indian students can further their studies in the highly competitive Sixth Form; while the Malays, Aborigines and only the few lucky non-natives who are randomly selected by the government pursue the pre-university matriculation program (Lim & Zhao, 2005). Generally, students experience a clear schooling pathway as discussed above but it is less clear for students with a disability. This issue is discussed in the section on student support provision in the meso level.

7.2.2 The Political Context and International Scene

Malaysia inherited a constitutional monarchy and system of parliamentary democracy from the British with an established federal system (Sheridan & Groves, 1987). The educational administration in Malaysia is centrally controlled and managed to coordinate with all other government policies (Musa, 2003). Policy guidelines are

formulated by the Ministry of Education (MoE), followed by the state, district and school at the lowest level (MoE, 2004). The structure reflects characteristics of a developmental state which is widespread in East Asia where macro planning is mostly centralised (Grewal, 2008; Leftwich, 1995; Wong, 2004).

In the economic aspect, heavy governmental intervention and the encouragement of private sector participation are both observed in Malaysia. Many current policies trace back to the period when Tun Dr. Mahathir bin Mohamad ran the government. He publicly endorsed the 'Look East' policy to learn from the East Asian corporate models of Japan and South Korea (Sundaram, 1994). At the same time, the American liberal market system which promotes the accrual of wealth and involvement of the private sector was also emulated to gain a strong foothold in the global economic market (Lee, 2000). Nevertheless, compared to its southern neighbour, Singapore; Malaysia is less influenced by Westernisation and market liberation due to the many constrictive nationalist and ethnic policies, as well as strong Muslim values (Esman, 1994; Khoo & Vedi, 2010). In other words, the government takes control in public affairs to maintain a stable and fair community even though more freedom can be observed in the economic and industrial sectors (Musa, 2003).

On the matter of social security, the fourth Prime Minister stated that Malaysia is a partial welfare state (Khoo, 1992). Many kinds of financial aid are given to the citizens such as subsidies on essential goods, petrol and medical services, free basic education as well as the monthly disabled persons allowance. The then Prime Minister maintained that Malaysia could not become a full-fledged welfare state as there were not enough high tax-payers in the country and it would inevitably bankrupt the nation. Another argument was that a welfare state partially operates according to communistic ideals which are considered to be economically inefficient (Chong, 2011; Rudra, 2002).

7.2.3 Participation in International Student Assessments

As a means to monitor the academic outcomes of the Malaysian education system against international benchmarks, Malaysia participates in the Trends in International Mathematics and Science Study (TIMSS) on a four yearly basis. Its objective is to

measure the mathematical and scientific knowledge and skills of fourth and eighth-graders over time (Gonzales et al., 2008). Approximately 20% of Malaysian students could not meet minimum benchmarks in both mathematics and science in 2007 (Foo & Idris, 2010). Malaysian mathematical proficiency is situated in the 'intermediate' band along with the United States, Australia and the Russian Federation but far behind Singapore (Foo & Idris, 2010).

That was a huge slip as the results in 2003 recorded that only 5% of students performed below the TIMSS benchmarked score in science and 7% in mathematics. In the testing of science literacy, Malaysia plunged 39 points from 510 in 2003 to 471 in 2007 which was below the TIMSS scale average of 500 (Ismail & Awang, 2009). Haron, Gapor, Masran, Ibrahim and Mohamed Nor (2008) argue that the switch in the medium of instruction from Malay to English in Science and Mathematics under the PPSMI (Teaching of Mathematics and Science in English) program in 2003 was the major factor in the decline in TIMSS results (Haron et al., 2008). Aside from the language issue, they believed that the reasoning ability of Malaysian students was still under par due to the examination-oriented education system which shapes smart test-takers but does not develop application skills (UNDP, 2004). In response to the decline in student performance in TIMSS, the PPSMI program was abolished in 2011 and the delivery of science and mathematics reverted to Malay (Chapman, 2009; Tan, 2009).

Malaysia has recently participated in the second round of the Program for International Student Assessment (PISA) in 2010 to ensure that student outcomes are impartially measured and scaled according to international benchmarks. Malaysia is ranked at the 54th position in the low quality/ low equity quadrant with a mean score of 414 on the PISA Reading literacy scale which is comparable to Brazil, Columbia, Thailand and Trinidad (Walker, 2011). Only 56% of Malaysian students meet the baseline reading competency needed to effectively and productively take part in the 21st century workforce. However, the proportion of between-school variance in performance accounted for by ESCS in Malaysia is fairly low at 8% (Walker, 2011).

7.2.3 Conclusion

This macro background establishes basic understanding of the broader political, socio-economic and educational context in Malaysia. The following meso and micro levels build on this understanding to explicate the relationship between the national and educational context, student support provision and the discourses of inclusion and neo-liberalism.

7.3 The Meso Level – Policy Development

This section presents the analysis of the Malaysian policy library. Education policy documents are first examined chronologically and then thematically to derive the significant discursive trends in the Malaysian education system. The analysis first looks into the shifts in the purpose and priority of education and funding patterns in Malaysia over time. After that, changes in the concept of inclusion in Malaysia are discussed prior to examining the development of legislation related to student support services. As this research focuses on dominant discourses influencing education policy decision-making, the analysis will show how the concept of inclusion is driving special educational change. This analysis will then be weighed with the examination of neo-liberal discourses in policy documents in order to determine which discourse has a more significant impact in the Malaysian education context.

7.3.1 The Purpose of Education

All educational undertakings by the Ministry are based on the national ideology (*Rukun Negara*) proclaimed in 1969 and the National Education Philosophy enacted in 1989 (EPU, 2010). The goal of this philosophy is to further develop the potential of individuals in a holistic and integrated manner to produce individuals who are intellectually, spiritually, emotionally and physically balanced and harmonious. The NEP states that:

> Education in Malaysia is an on-going effort to produce Malaysian citizens
> who are knowledgeable and competent, who possess high moral standards,
> and who are responsible and capable of achieving high level of personal

well-being as well as being able to contribute to the harmony and betterment of the family, the society and nation at large. (MoE, 2001, p. 16)

The discourse of performativity and competition is not evident at all in the NEP but the National Development Policy (NDP) introduced in 1991 had a much stronger emphasis on human resource development for national economic stability (Lee, 1999). It has been a major cause of concern for policy leaders that nearly two-thirds of the Malaysian job market is made up of unskilled workers and a huge mismatch exists between the low literacy competencies and workplace requirement for national development. Consequently, a rich discourse of "education for the economy" underlay the NDP which complemented the Vision 2020 in harnessing education as a tool to make Malaysia an industrialised country with an emphasis on science and technology (Mohamad, 2009). Besides encouraging the growth of private sectors, there was a renewed orientation of connecting education closely to the industry and the manpower needs to build a prosperous society.

The 10th Malaysia Plan 2011-2015 aims to promote transparent and market-friendly affirmative action in support of the Government Transformation Program and the New Economic Model (National Economic Advisory Council, 2010; PEMANDU, 2010). Malaysians are encouraged to aspire to "One Malaysia" which speaks of "People First, Performance Now" (EPU, 2010). In line with this slogan, education is listed as one of the National Key Result Areas (NKRA) which aims at improving and enabling access to quality education for all students (EPU, 2010). The education NKRAs cover four areas: pre-school enrolment rates, high performing schools, literacy and numeracy screening (LINUS) program, and a new deal for head teachers and principals. These policy initiatives will be elaborated in detail in relation to their causal discourses respectively.

7.3.2 Important Concepts in Malaysian Legislation

The shift of terminologies in describing student support provision in Malaysia is directly influenced by global discourses. The British influence on the Malaysian special education design is much less than the formulation of general education policies at the time of gaining independence in 1957; as special education was

officially made available only in the mid-1960s. The special education model from the United States heavily influenced the construction of relevant policies and programs in the early stages (Chua, 1986). The term "special education" was widely used in many regions following the Warnock Report in the United Kingdom in 1978 and has been conveniently adopted by the Ministry of Education in Malaysia (Tomlinson, 1985).

It still refers to a kind of instruction specifically designed for students with visual or hearing impairments which takes place outside of the mainstream environment. Learning disabilities are also included in the special education program and this category includes children with Down syndrome, mild autism, mild cognitive disabilities, behavioural and emotional difficulties, health problems, and speech and language difficulties (Haq, 2000; MoE, 2004). The Special Education Department (1999) limits the definition of special needs to students who are visually and hearing impaired, with severe learning difficulties, and the gifted. Learners with physical impairments are excluded from special education provision. If they are not capable to interact and carry out daily routines independently in schools, they are institutionalised under the Department of Social Welfare to receive rehabilitative education and therapeutic interventions (DoSW, 1999). As the judgment of such "ability" is not lucidly stated in policy papers, students with physical impairments may not be accepted into special or integrated classes.

Since 1980s, the concept of normalisation is the axis around which special education is organised in Malaysia to enable students with "special" needs "to adapt themselves in the normal society by utilizing the ability that they had possessed" (Kamaruddin, 2007, p. 52) through education, medical benefit and financial support (Isa, 1990). Following the announcement of the Salamanca statement and the Framework for Action on Special Needs Education by UNESCO in 1994, the Malaysian government voiced its full support in normalising the educational experience of children with special needs (Ibrahim, 2002). Since then, the phrase "inclusive education" (*pendidikan inklusif*) has been frequently used in education policy documents and degrading words such as "handicapped" and "retardation" have been replaced with "impairment" and "needs". Inclusion is defined as the process of educating children with special needs in an environment where they have maximum interaction with their non-disabled peers (MoE, 1994; 2004). In Malaysia, inclusion

conveys an effort to bring those children closer to ordinary schooling but the action of placing them in mainstream schools is known as integration[27].

In fact, inclusion and integration do not differ too significantly in meaning, only in the context of usage. Hence, special classrooms which are incorporated into mainstream schools are called the integrated classrooms. Partial integration/ inclusion is achieved in the Malaysian context if a child with "special" needs is enrolled in a special class in a mainstream school while attending some lessons in the regular classroom for certain subjects. On the other hand, full integration/ inclusion occurs when the child is transferred permanently into a regular classroom to receive instruction in all subject matters. Furthermore, the integrated classrooms and the special schools are the two main education support structures characterising special education provision in Malaysia. However, these concepts remain only partially understood by education policymakers and are sometimes used interchangeably (Adnan & Hafiz, 2001; Jelas, 2000). Even though policy statements have adopted more normalised terms in recent years, these concepts are not linked to any general education policies at all which inhibits the formulation of more inclusive policies.

7.3.3 Legislation and Development of Student Support Provisions

This section outlines the progressive development and trends in special education legislation and support services in Malaysia. The disability rights movement, which sprung from the activism by the disability community of the United States in the 1960s, had created awareness among early Malaysian educational policymakers to consider educational rights of children with special needs several years after gaining independence from the British. Education Act 1961 laid out the original initiatives to combine ministerial effort and medical professionals in "defining the several categories of pupils requiring special educational treatment and the method appropriate for the education of pupils in each category in special schools or otherwise" (Section 10). This Act marked a moment of great progress as such services were previously established through private effort which were lacking in funding, structural consistency, accountability and legal obligations. However, implementation

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[27] Refer to chapter 2 literature review for elaborate discussions on the UNESCO's definitions of inclusion and integration, and their educational implications.

was lax due to financial restrictions and scarcity of experts which prompted the publication of the Cabinet Committee report in 1979 to improve resources and facilities of education for the blind, introduce formal schooling for the deaf at age 6 and incorporate remedial education in primary schools.

To establish clear distribution of responsibilities for better management, the 1981 Mahathir report structured education, rehabilitation, vocational training and job placement of the "handicapped" separately based on different ministerial functions. Since then, the Ministry of Education builds and maintains special schools for the hearing impaired, visually handicapped and the mildly mentally retarded. The Ministry of Welfare Services manages the education of the physically handicapped, moderate, severe and profoundly mentally retarded, and children with cerebral palsy. Children with multiple and severe disabilities were perceived as lacking the essential independent skills to receive formal schooling and require constant medical attention. Under the supervision of the Ministry of National Unity and Social Development, they receive educational services in early intervention and community-based rehabilitation programs. This compartmentalised and segregative management of "types" of children has prevailed by channelling students with lower cognitive abilities to other "viable options and alternatives" (MoE, 2004, p. 25) instead of mainstream learning.

Over the period of 1980-2000, a series of official policy endorsements had significantly garnered acknowledgment of equal educational entitlements relating to children with a disability in Malaysia; yet concrete actions remained poorly elaborated. Emulating the Individuals with Disabilities Education Act of the United States, the MOE adopted the "least restrictive environment" policy in 1981 but has not been adhered to in practice with the rigidly dichotomised system segregating formal schooling and institutionalised welfare provision based on students' degree of disability. This discriminatory practice which denies a considerable amount of children of school-based learning has persisted to date even though Malaysia has signed the UNESCO's appeal towards "Education for All" (EFA) in 1990 followed by the Proclamation on Full Participation and Equality of People with Disabilities in the Asia and Pacific Region in 1994. The medical discourse was further strengthened under the Education Act 1996 and the 1997 Special Education Regulations by drawing a line between the "educable" and the "ineducable". Eligibility for special

education placement is strictly determined by medical personnel to cater for educable children who are able to manage themselves without help (Adnan & Hafiz, 2001; MoE, 1998). Cluttered bureaucracy involving medical screening, school evaluation for admission and the initial 3-month probation has discouraged the acceptance of students with additional needs into mainstream education.

Huge divides exist between the clear affirmation of rights in the Persons with Disabilities Act (PWDA) 2008 and federal constitution against the discriminatory educational Acts and stagnant school development which encumber the accessibility of education for students with additional needs. Section 28 of the PWDA postulates general responsibilities of the government and educational providers to "provide reasonable accommodation suitable with the requirements of persons and children with disabilities" to preclude their exclusion "from the general education system on the basis of disabilities". This strong statement governing inclusive treatments is contradicted by the replete absence of accountability when action or legal proceedings cannot be "brought, instituted or maintained in any court against the government" (Section 41) under any circumstances. Article 8 of the Constitution equally speaks of equality of treatment and entitlement to rights for "all people" but protection against discrimination is not extended to the disabled cohort. Unethical standards which violate the democratic principle are particularly pronounced when facilities for the disabled are still found wanting in schools and public facilities although the Uniform Building By-Laws has been gazetted nearly three decades ago in 1984. When 80% of physically-impaired children are pressured to drop out from primary schools due to the lack of disability access and support (Ariffin, 2012), the rights-based discourses in dysfunctional long-standing laws are merely policy rhetoric to protect the interests of the prudent government.

7.3.4 Funding Allocations and Targeted Areas

The Malaysian government devotes a considerably large portion of their economic resources to the education sector through the five-year national development plans for the purpose of human resource development (UNDP, 2004). The total education expenditure as a share of GDP (Gross Domestic Product) reached 7.4% in 2003 which exceeded other top OECD spenders such as Denmark and Iceland; but dropped

dramatically to 4.1% in 2008 due to economic constraints and is now behind Australia, United Kingdom and Finland (The World Bank Group, 2011). Funds allocated to educational support programs in the 7th Malaysia Plan have increased 34.3% with the growing awareness of the importance of remedial services to curb the widening student achievement gap (Economic Planning Unit, 1996). In 2006, 29,169 students with visual, hearing and physical impairments accessed the disabled student allowance which totaled up to 7.8 million Ringgit Malaysia (2.6 million US$) to support their primary schooling (MoE, 2008b).

Nevertheless, education funding tilts heavily towards investment in schools demonstrating high academic achievement through new accountability-based policies such as the New Deal and High Performing Schools (Sani, 2011). Schools in rural areas, special schools and those occupied by students from less privileged backgrounds still lack basic amenities and good teachers (UNDP, 2005). These polarities have not been managed in an equitable manner as schools with better student outcomes benefit more from the system in terms of funding and rewards (Unit Pengurusan Prestasi dan Pelaksanaan, 2010). Inequity in resource distribution exacerbates the polarities between well-equipped elite schools and rural or low-achieving schools facing considerable logistic barriers which hinder the development of inclusive learning conditions.

7.3.5 Enrolment Trends - The Integration Movement

In 2001, the MoE initiated the new Integrated Special Education Program (Program Pendidikan Khas Integrasi - PPKI) to establish special education classes (SEC) in mainstream schools. The Ministry states that the aims of such integrated placements are: (a) to facilitate learning social skills necessary for interacting appropriately in society, (b) to develop positive self-esteem for acceptance in an able-bodied world, and (c) to share available resources in regular classrooms (Haq, 2000). This integrated placement trend since 2001 reflects improvement in ministerial commitment to support the Salamanca Statement.

Figure 7.2 Students with special needs in special schools (SS) and integrated program (IP) 2004 - 2008
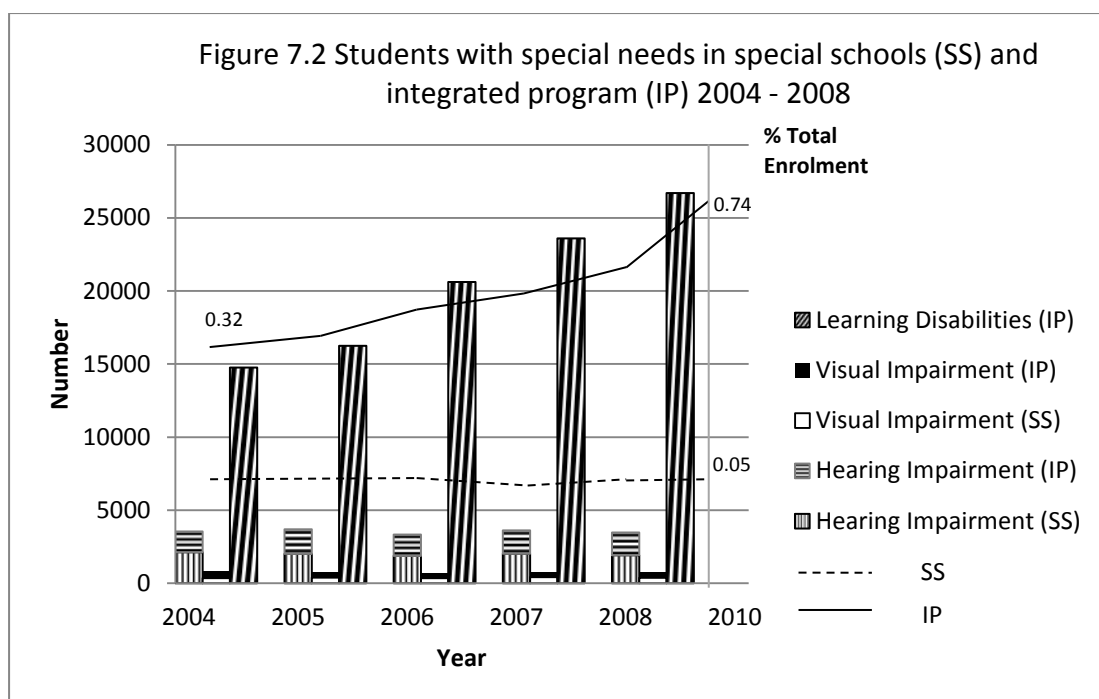
Source: BPPDP, 2010; MoE, 2008a; 2008b; UNESCO IBE, 2009

Table 7.1 Student placements in special schools and integrated programs 2004 - 2010

	2004	2005	2006	2007	2008	2010
Special school	2,473 (0.05%)	2,399 (0.05%)	2,333 (0.04%)	2,569 (0.05%)	2,418 (0.05%)	2,527 (0.05%)
PPKI	16,657 (0.32%)	18,335 (0.34%)	22,410 (0.42%)	25,543 (0.47%)	28,652 (0.53%)	39,423 (0.74%)
Total Public Enrolment	5,277,101	5,355,159	5,364,707	5,421,158	5,359,585	5,297,708

Source: BPPDP, 2010; MoE, 2008a; 2008b; UNESCO IBE, 2009

Figure 7.2 above illustrates a contrasting dual trend with unchanging enrolment patterns in special schools against the growing number of students registered in the integrated programs (PPKI) in regular schools from 2004 to 2010. Table 7.1 informs that special education enrolment was recorded at around 41950 students in 2010 which was almost thrice the number in 2002 with just 14535 placements (MoE, 2008b). The number of special schools has remained constant at 32 since 2006 while

integration programs have experienced a 92% growth from 668 in 2004 to 1282 in 2010. Correspondingly, the static special school enrolment trend which has been recorded around 0.05% of the whole school age cohort can be explained with the limited places made available for children with more significant support needs. The small figure is not a representation of successful inclusion or integration but the incapacity of the Malaysian education system to incorporate students with disabilities into formal schooling. Students with significant intellectual, physical or multiple disabilities are excluded from mainstream educational opportunities and are consigned to community rehabilitation centres under the Department of Social Welfare so that they could "live independently and to be integrated in the community" (DoSW, 1999). "Ineducable" children who were denied proper learning experiences and relegated to care services exceeded 10,866 in number in 2006 which did not take into account the much larger pool in costly private centres (RM132000 a year) and neglected homes. The Committee on the Rights of Child (2007) also concluded that an estimated 200,000 Malaysian children aged 6 to 12 do not attend school.

The student screening and administration system is a major contributing factor that inhibits integration and inclusion as the central Ministry of Education is responsible for special school admission while casting those diagnosed medically as 'ineducable' to the Department of Social Welfare. The state education departments authorises the transfer of students mainly from mainstream classes into the integrated programs with the approval from school principals. Such arrangement diminishes greater possibility of cooperation and inter-departmental interaction and students are unjustly trapped in the unclear bureaucratic divisions with low or no academic mobility. The Education Act 1996 stipulates that students diagnosed with learning disabilities without any physical handicap are not entitled to special school placement but are all automatically signed up for the integrated program (MoE, 2004). In most cases, students with visual or hearing impairments commence learning in mainstream special classes only at the secondary level due to administrative and educational convenience when all three categories of disabilities are combined for vocational learning with good opportunities to participate in lessons with their "normal" peers. Discrimination also exists when the system establishes integrated arrangement for vocational learning but segregated special school placements for students with a disability opting for academic subjects in secondary schools.

While the quantity and enrolment trend of special schools have remained the same since 2004, the consistent growth of the special education population indicates that more students are segregated into the special classes within mainstream schools than are being included in regular classes. Having said that, as the "integration" movement is relatively new in this country which started since 2001; this integrated special education program is regarded as the new additional support structure for pupils with severe learning disabilities who may not benefit from ordinary schooling or remedial classes. Before this provision was made, those students would have remained in remedial classes, been neglected in ordinary classroom or worse dropped out of school. Students with Down syndrome, who are now categorised under learning disabilities, benefit most from this program as they previously had no option but to be institutionalised before the integration program was launched.

The integration program within the mainstream school offers two schooling arrangements: the separate special class provision or the part-time special class/ part-time ordinary class provision (MoE, 2006a). "Segregation is the essence of teaching and learning for these students" (MoE, 2008b, p. 9). It is specified clearly in the 1997 Special Education Regulations that children must not require assistance in carrying out daily routines of schooling such as toilet usage to qualify for placement into integration classes (MoE, 2008b). Additionally, they must demonstrate the ability to cope with the pace of mainstream learning and do not have disruptive behavioural problems. To benefit from partial integration into regular classes, students have to further prove "their ability to accommodate and assimilate into the mainstream" (MoE, 2004, p. 26). The Ministry clearly does not intend to place every child with special needs in the general education classroom. The rationale of the policy restriction of "educability" is to ascertain that integration must be functional and viable. The child must demonstrate adequate adaptive ability to fit in to the receiving school academically and socially, and only then would limited adjustment and provision of facilities be made available. Another major drawback is the absence of a systematic review process to gauge the readiness of students for integration, aggravated with the notion of student deficiencies instead of school incapacities.

Since 1999, there has been a major shift to vocationalise special education in secondary schools, particularly for children with learning and hearing impairments (Adnan & Hafiz, 2001). The Department of Social Welfare (1999) states that special

education should focus on "pre-vocational, vocational and labour training so that students can attain perfection according to their limited abilities" (Adnan & Hafiz, 2001, p. 660). For instance, students who are visually impaired should acquire high-level mastery of basket weaving or other vocational skills that they choose to specialise in. The two major aims include imparting employable skills in order to reduce economic burdens caused by the disabled population on their family and community, as well as fulfiling the manpower needs of the country (UNDP, 2004). The Ministry repeatedly stresses that the future of special education should veer towards vocational and technically oriented studies with the support of industries (Adnan & Hafiz, 2001; MoE, 2004). The job-matching approach oriented on types of impairment denigrates their intellectual worth and dehumanises individuality, learning process and outcomes.

The education received by students with special needs is primarily vocational at the upper secondary level or uses the alternative special curriculum which consists of all general subjects as well as the additional life skills module, all highly adapted to become more reduced in content in order to impart rudimentary knowledge and skills. Both offer limited pathways and employment prospects or further education. These learners mostly obtain jobs in low-paid services or manufacturing sectors (Adnan & Hafiz, 2001). This situation could perpetuate the low position experienced by the disabled in Malaysian society. A more enabling approach to reduce exclusion would be to extend the definition of educability to all children. In addition, the examination-oriented model requires transformation from "the one-size-fits-all approach into another approach which is more appropriate to local and communal needs" (MoE, 2006a, p. 28)

7.3.6 Reflecting on Policy Development

Since the national endorsement of the Salamanca statement and the commencement of integrated programs, "inclusive education" and "inclusion" have been discursively adopted relating to educational provision for students with a disability (MoE, 2004; 2006a; 2008a; 2008b; UNDP, 2005). In practice, inclusion does not differ distinctly from integration which signifies educational placements of students with special needs in mainstream special classes. This does not fit with the definition given by

UNESCO that emphasises collective learning in regular classrooms and flexible schooling arrangements (UNESCO, 1994). A large number of students accepted in the PPKI integrated classrooms are not from special schools but are transferred from ordinary classroom after they were confirmed to have learning disabilities through screening tests, medical diagnosis and teacher recommendation with parental approval (EPU, 2010).

The medical model still prevails in the Malaysian special education system which has a total reliance on medical experts as the gatekeeper for student support (Adnan & Hafiz, 2001). Screening tests and medical examinations are the instruments used by nurses and doctors to determine the cause of learning problems and to decide a suitable placement prescription for the children. The main focus dwells on the students' deficiencies instead of their abilities. The contentious definitions of disabilities make matters worse when students are placed in learning environments which do not match their needs and aptitudes. Students with significant visual, hearing and physical impairments are institutionalised for rehabilitation so that they could function more independently within the "normal" society.

7.3.7 Neo-liberal Influence

As discussed in the macro level, the broader socio-political and economic development has a significant influence on educational policy directions. The National Development Policy (1991–2000) first highlighted the potential of education to boost human resource development to produce a capable labour force which has a competitive edge in the global market. Neo-liberal influence can be detected in the 10th Malaysia Plan (2011- 2015) which put forward key ideas such as "internally driven, externally aware", "unleashing productivity-led growth and innovation" and "government as a competitive corporation" (EPU, 2010). Education is listed as one of the National Key Economic Areas (NKEAs) and inclusiveness is defined as equal opportunities of economic participation and enjoyment of national prosperity (EPU, 2010).

The liberalisation of the economy is further enhanced with a strong emphasis on achievement and accountability as supported by the New Economic Model (2010) which promotes a market-friendly, transparent and sustainable knowledge-based

economy by 2020 by increasing the participation rate of the student population in the Science stream from 27.7% in 2000 to 60% over five years. Based on an integrated human capital and talent development framework (EPU, 2010), the whole educational system will be revamped aiming at raising student outcomes, increasing employability and reforming the labour market towards a knowledge-based economy.

a) High-stakes Assessment and Streaming

High-stakes tests have been implemented in the education system for decades and the results are used to determine whether students can gain entry to the next grade, obtain government scholarships and choose academic or vocational subjects. National examinations (UPSR, PMR, SPM, STPM, etc.) are frequently used as a yardstick of school efficiency and for selective streaming purposes (Lim & Zhao, 2005; MoE, 2007). These summative examinations "are treated in great secrecy because of their high-stakes consequences" (Ong, 2010, p. 101). In response to the commitment to EFA goals, Malaysia has loosened up the streaming practices to reduce high school dropout rates. Since 1998, the progression from secondary form 3 to form 4 has become almost automatic as students only need a minimum grade D out of at least seven subjects to be promoted to the following year. More than 96% pupils in secondary form 3 moved to the following year in 2005 (MoE, 2006b).

Based on performance in the Lower Secondary Assessment, students are channeled into the science, arts, technical or vocational streams at the upper secondary level (Grauwe & Naidoo, 2002; Ong, 2010). Students who fare poorly in the Lower Secondary Assessment are most often referred to the vocational or technical stream which offers practical training in trade skills or specialised technical skills. The dominance of national examinations in student performance has also resulted in a "teach to the test" syndrome (Lim & Zhao, 2005). There is simply no space for students with additional needs to get more personal attention or tutoring. They are left to their own devices without the support of teacher aides to cope with the hefty seven subjects in the Lower Secondary Assessment, 10 for the Malaysian Certificate of Education and four for the Malaysian Higher School Certificate. The intense academic rigour disregards the importance of holistic learning in gaining

knowledge and socio-emotional well-being and significantly reduces education to test sheets and contest in which students with special needs fall bottom.

Without adequate individualised support provision, their learning difficulties continue to be undealt with and accumulate into what the authorities recognise as "learning disabilities" as they become academically many months behind their peers. In response to years of criticism, the Malaysian Examinations Syndicate (MES) intends to "make schooling less examination-oriented" (MoE, 2006a, p. 35), introduce more school-based assessment and reduce the number of tested subjects but to no avail. It seems that neo-liberal measures have almost extinguished the effort to promote inclusive education and the numerous high-stakes assessments are here to stay in Malaysia.

b) School-choice Policies

In Malaysia, educational choice is created for the promotion of ethnic language and culture, racial harmony as well as to drive competition for school improvement, encompassing the national, national type, Islamic religious schools and private institutions (Jamil, 2010; Joseph, 2005). Popular schools carry the reputation of academic excellence in national examinations which are often publicised in the local media (Lee, 1999). Inequity persists with a large rural-urban academic gap as boarding, elite and high performing schools concentrate at urban localities with children from higher socio-economic backgrounds; in contrast, rural schools are constantly encountering logistical problems with facility shortage (Ong, 1990). Selective charter public high schools are mostly boarding schools for students with outstanding academic achievement which are limited in number.

Private educational institutions were first recognised in the Education Act 1996 which allows for school choice. It is stated in part VII that "nothing in this Act shall be construed as prohibiting the establishment and maintenance of a private educational institution." Private institutions have gradually flourished at pre-school, secondary and post-secondary level although the involvement of private sectors in primary education remains minimal. The number of private schools have risen from 130 in 2001 to 297 in 2008, comprising Chinese private, international, denominational and other schools (Muhriz et al., 2011). Public schools were still the main choice in

2008 with 5.3 million enrolment compared to 113,795 in private schools (Nation Master, 2011). Despite the government's urge to enhance school autonomy and build up school choice, large scale privatisation would not be possible in the near future as state intervention is required to maintain educational equality and homogeneity (Balasubramaniam, 2007; Shamsul Haque, 2003). The ministry has set up a Private Education Division and introduced the Code of Practice under the Education Act 1996 to monitor marketing activities, fee structure, student registration, study programs and teaching staff in the private sector to "safeguard the interest of the various stakeholders, particularly that of the students" (MoE, 1998-2012).

c) Accountability and Benchmarks

> To increase the efficiency and effectiveness of education management, the strategies include strengthening the management system of the MOE by increasing autonomy and decentralising the process of decision making and problem solving. (Malaysia Education Development Plan, p. 13)

The strong emphasis on standards and performance is intended by the ministry to ease down on direct intervention and resource input to drive school improvement. The Inspectorate of Schools of the ministry conducts routine inspection of a proportion of schools three times a year to evaluate school management, environment, curriculum, learning materials, teaching quality and leadership competence (Grauwe & Naidoo, 2002). Top schools which show quality management in inspection outcomes and in the EQSI school ranking are given the Minister's Quality Award and the National Aspiring School Award (MoE, 2000). An apt example is the launch of the School Improvement Program in 2010 which distributes the School Improvement Toolkit and Plans to all public schools to strengthen self-management. In the EFA assessment, Malaysia frequently adopts ideas from the World Bank to prioritise management for results, by "strengthening financial monitoring activities" (MoE, 2010, p. 13), evaluating learning outcomes, cost-effectiveness and financial returns of student support services and vocational programs (MoE, 2008a).

Through public examination, schools are held accountable for the students' educational outcomes relative to national benchmark and the ranking in school league

tables (EPU, 2010). The stress experienced by school teachers and principals as a result of mounting accountability imposed by the central government is aggravated by school ranking based on the performance composite score. To reward and empower the most outstanding schools, the Performance Management & Delivery Unit (PEMANDU) which was established in 2009 targeted 100 high performing schools (HPS) in Malaysia with an allocation of RM140 million (Chin, 2010). The better the status, the greater the level of accountability is imposed on awarded schools in terms of targeted academic outcomes. As shown in the table below, the generous amount of autonomy given to the schools aims to generate strong work cultures and excellent human capital which has the ability to compete in the international arena (Unit Pengurusan Prestasi dan Pelaksanaan, 2010). A lot of government funds and incentives are channeled into this program as the selected cluster schools are given more than RM500,000 to further develop themselves to gain the recognition as high performing schools (Ismail, 2011, PEMANDU, 2011). Although the Ministry aims to promote clusters of excellence in various types of schools to achieve world-class standard, the public has criticised this focus on selected schools at the expense of many schools which are short of basic amenities.

Table 7.2: The privileges and rewards obtained by high performing schools

	Description	Examples
Autonomy	Increased autonomy in decision-making, school operations, and selecting teachers.	Teach any syllabus, flexi-time table and school-based assessment. Use multiple modes of instruction - IT based Financial management
Financial allocations/ incentives	Incentives/ allocation for schools, school leaders, teachers, and non-academic staff	RM700,000 for schools RM1,000 per person for secondary schools RM700 per person for primary schools
Training and capability building	Allow greater range of options for capital development	Sabbatical for head teachers as appropriate Tailored program for

		professional enhancement according to needs analysis
Fast tracking of students	Allow high achievers to advance faster	Compressed syllabus 50% year 2 in year 1 and another 50% in year 3

Source: EPU (2010)

7.3.8 Conclusion

The Malaysian government has stepped up results-based public managerialism when the Government Transformation Program was unveiled in 2010 to accelerate national growth based on the new principles of "One Malaysia, People First, Performance Now". The large reward given to high performing schools vastly exceeds the financial assistance given to rural and underdeveloped schools or schools which urgently need funding to carry out remedial or integration program. Referring to the Malaysian Education Quality Standards (SKPM) mentioned before, the 10% of the bottom schools which have the lowest composite scores are identified so that appropriate training can be given to the school teachers and principals. However, if the school continues to show low performance, punitive actions such as transfers and voluntary separation are taken. Considering the workplace leniency practised in the Malaysian education system for many decades, those new strategies and programs are definitely drastic actions to hold schools more accountable and function like semi-private institutions.

7.4 The Micro Level: Interview Discourses

The following micro level analysis readdresses the influence of inclusion and neo-liberal agendas which have been analysed in the meso level. The contextual data which were elaborated in the macro level provides the groundwork for readers to understand the issues in the subsequent levels. The issues are also discussed at the policy-making level through the voice of Malaysian policymakers. As the data in this final level is based on individual perspectives of five policymakers (as shown in the table below), different reactions and feedback to the current educational practices and

student support design are able to enrich the dialogue on influential discourses. Interpretation of the discourses is also made to relate the data to the research questions.

Table 7.3 Malaysian interview participants profile

Date	Participant Codes	Organization	Unit	Interview Duration
17th December 2010	M1	Ministry of Education	Curriculum Development Division	66 minutes
17th December 2010	M2	Ministry of Education	Special education division	62 minutes
21st December 2010	M3	Ministry of Education	Competency Development And Assessment Division	102 minutes
21st December 2010	M4	Ministry of Education	Special education division	76 minutes
6th January 2011	M5	Ministry of Education	School management division	32 minutes

7.4.1 The Rise of Integration under a Persisting Medical Model

Inclusion was introduced in the 1970s to overcome the shortcomings of integration by forming a student-friendly learning culture which is responsive to diverse needs and offers real participation to students with "special" needs in the everyday school life. However, the two concepts of inclusion and integration are used interchangeably without much distinction in meaning by Malaysian policymakers. Drawing from policy resources and interview data, inclusion conclusively denotes integration which is restricted to student placement in the mainstream environment without reference to the wider organisation. This confusing discourse usage clearly shows the current state of "special" education progress in Malaysia which has not gone beyond the integration stage. The term "inclusion" is conveniently adopted following the widely endorsed Salamanca Statement but in no particular document, let alone laws and regulations, has any policy of mainstreaming in regular classrooms been mentioned. Instead, the discourse of disability prominently dominates the mindset of education

policymakers who equate special education with support provision for students diagnosed with a disability. M4 from the special education department asserted that when teachers face "difficulties in handling" children with additional requirements, "doctors are able to acquire the latest skills or help that they can give in terms of medicine, in terms of facilities and so on to help these people". In addition, the equivalence of inclusion to integrated placements is further evidenced by the allusion to "partial" and "full" inclusion, as described by M2, a policy maker in the special education division.

> In Malaysian context, we have two kinds of inclusion. These two inclusions will depend on the children, the special children. If the children cannot perform in the normal classroom, so we have to offer partial inclusion for them. (M2)

In addition to lack of policy support and deep understanding of inclusion, other inhibiting factors are identified as inadequate funding and low supply of "specialist expertise" (M2). The Department of Special Education mainly invests in training "special" teachers for "special" types of disability but the cultivation of inclusive measures such as classroom diversity, pedagogic flexibility, individualised learning environment, organisational creativity and multidisciplinary teamwork remains minimal. As a partial welfare state, Malaysia is still short of an early intervention and functional collaborative system consisting social services, qualified school-based support teachers and healthcare professionals to prevent drop-out and learning failures. With limited legal recourse to secure educational rights and low trust in teachers' capacities, the diagnosed learning needs and placement options of children with disabilities are legally decided by medical professionals. Disability-specific classes are another reflection of a highly differentiated and segregative "special" education sector as hospitalised institutions cater for students with severe physical and intellectual impairments, special schools are built for students with visual and hearing impairments, while integrated classrooms primarily accept those with learning disabilities. M4 succinctly expressed the difficulties of including children with "special" needs into the mainstream environment as the central focus in schools is drilling students for standardised examinations through teacher-centered pedagogy.

> If we put them in the inclusive model, the children, it's very difficult for them as well as very difficult for the teachers and the mainstream children. It will take some time, maybe years of adjustment. (M4)

A strict adherence to the medical model is observed when students with higher level of support needs are considered not "educable" by regulation. The integrated special education classes are introduced only for students with mild or moderate impairments to fit into "the normal society" (M3) after the completion of basic education. Whilst placing some "blind" and "deaf" groups into mainstream schools is an act of integration, the more common practice of identifying and transferring students diagnosed with learning disabilities from regular classrooms into "integrated" classrooms is a form of segregation. The whole picture clearly shows the absence of an inclusive school culture and the lack of a well-organised support structure, especially when the integrated classroom is sometimes misused for remedial intervention. Schools lack pre-requisites of successful integration including deficient basic amenities, reuse of old buildings without modification for integration classes and recruitment of unqualified teachers. However, according to M1 from the Curriculum Development Division, the Ministry "cannot wait until a time that all the facilities are ready only then we can have the integrated approach, that will take years".

From the perspectives of these policymakers, the continuum of placement from fully segregated special schools and complete integration into regular classrooms is required as "children might not have enough social skills to blend into the mainstream environment" (M1). Malpractices are observed in some schools where the integrated students are given a different recess time (lunch break) and activity hours which greatly limit inter-group interaction. Prior to integration, many students with "special" needs are being trained stage by stage to familiarise themselves with the physical environment of mainstream schools and are given "behavioural modification". The national curriculum and central examinations are only catered for the "high-functioning" students while "low-functioning" students use the alternative special curriculum which compromises a dignified learning process. The lower standards are imposed on students with higher intellectual capacity solely because the regular classrooms are not equipped to educate a "blind, deaf or handicapped"

student. Usage of words like "blind/deaf/mute" and "normal/special" among the Malaysian policymakers also reveals a lack of understanding of the aspirations of inclusion. The national curriculum is also criticised to be very rigid and inflexible; so much so that little can be done by teachers to modify it to suit individual needs and learning pace. The interview data reveals that integration has to be earned from the effort of students rather than through schooling improvement and administrative adjustments.

> Let's say dyslexic program in normal school. The students will be included in the integrated classroom. When they are okay, will go for full inclusion in regular class. If there are a lot of things they cannot cope, they will come back to the previous class. So depends on the students. And another thing is full inclusion, but the problem is the normal teachers don't know about special need children, that's the problem. (M2)

Another trend discussed by all of the policymakers is the vocationalisation of special education. According to M4 from the special education division, students with special needs are not capable academically and should be adequately prepared through transitioning programs "to acquire vocational skills so that they will be able to end up with a job that they can handle". Before those students graduate from upper secondary vocational schools, companies from craft centres and other industries would pay a visit to spot potential workers.

> The Ministry is doing a great job by giving the children special skills so that when they go out, they can survive in the society. Our former curriculum, you cannot keep pace with our mainstream curriculum, sorry, off you go. But now we have looked into their needs. (M1)

> Nothing much can be done to assess the people but to teach these people how to fend for themselves later. So that basically they know how to cope, basic food for breakfast. For example how to tidy up themselves, I mean to… how to fend for themselves, to survive in this kind of world so that they can lead their lives better. We don't assess these people, we just see whether they improve in certain skills. (M3)

As special education is relatively new in Malaysia, the effort of raising the inclusiveness of schools is still in its infancy. M2 explained that the medical model is dominant in Malaysia as no educational specialists could carry out diagnosis of learning difficulties to date, other than medical experts from hospitals and non-governmental institutions. The Malaysian student support services act as a dehumanising sorting device to diagnose, discriminate and segregate the "ineducables" from formal schooling as opposed to providing support in the "least restrictive environment" adopted by the government since 1981. Special provision which is rehabilitative in nature emphasises the physical and intellectual deficiencies of children as they "are always incapable of responding to the normal process of teaching and learning" (SED, 1999b). Students with additional needs are socially constructed as academic outcasts with "learning problems" (M5) situated within them, and with the lack of intellectual potential, hence are passively sent to community care centres. The lack of awareness, widespread apathy and governmental failure based on the notion of able-mindedness jointly contribute to construct the notion of ineducability within students with disabilities to protect their own self interests.

7.4.2 Neo-liberal Discourses on the Increase

The Malaysian education system has taken a three-pronged approach based on the National Philosophy of Education and the New Economic Model to produce a morally just and skilled populace. The new Standard Curriculum for Primary Schools (KSSR) which will be implemented in 2012 has added the fourth R of moral reasoning to the previous 3Rs (Reading, wRiting and aRithmetic) in the New Primary School Curriculum (KBSR). While moral values, citizenship and a holistic integrated curriculum hold the key to a quality education, education is also used as a tool for nation-building as harmony is of utmost importance in a plural society. The third focus, as explained by M3 from the Competency Development And Assessment Division, is the importance of a global paradigm shift which Malaysia keeps up by training students to "think and achieve outside the national territory, engage in effective and persuasive communication skills, demonstrate leadership skills and exude confidence". The ability of the educated human capital to excel in a competitive world has increased in emphasis. M5 from the School Management

Division elaborates that the four components of "educability, trainability, marketability and employability" show a sequential progress of the learning process, to initially be educated, then trained in order to become a marketable and employable member of the global society.

As students who are "churned out" in schools do not wholly fulfil industrial or market needs, hence vocational and technical education play a major role. M3 strongly believes that the strengthened private and corporate participation in the education system is "the right move to transform the nation". The education sector works closely with the Performance Management and Delivery Unit (Pemandu) during policy decision-making in order to get more input from the private or corporate sector to enhance the educational delivery system. It is important to note that the Finnish success in PISA based on a welfare support model has not gained the attention of Malaysian policymakers who are all unaware of the PISA assessment and ranking during the separate interview sessions. On the contrary, Japan, Korea and Singapore are regarded as role models of academic excellence and high social accountability with a competitive edge to succeed under the demanding societal pressure.

In line with the analysis across the three levels, centralised examinations are considered one of the highest priorities by the Ministry to benchmark and improve student learning outcomes. This is connected with the recent trend of school ranking and clustering which is becoming increasingly popular in recent years to determine low- and high-performing schools. The over-reliance on central examinations is asserted by M1 to be "unfortunately the only measuring criterion for us to get the results". Learning has been made uncreative and shaped for the sole purpose of doing well in examination. In response to the heightened standards in the new curriculum, children with additional needs struggle to acquire that high level of academic competence. M2, M3 and M5 convey that educational streaming based on assessment grades "ensures fair play and guarantee an education for all" as weak learners are not left behind but streamlined to vocational or technical programs. M2 clarifies that a clear division in schooling pathways is embedded in the system so that "high achievers pursue higher education, the middle should do their best to survive, the weak and those with special needs should be identified and directed to the vocational track". M3 further proposes that students should be streamlined as early as possible:

My suggestion is to streamline students at a very early age of 13, rather than 16, form four. In order for you to become a developed nation, you have to develop your human capital at a very early age. And we also have to realise that there are also students who cannot read, write in one of the three areas, 3Ms, *menguasai membaca, mengira, menulis* (mastering reading, arithmetic and writing). In 2009 I think there are around 12,000 who cannot master all these. Handicapped in one of these three areas. We just put them in the mainstream and you know by end of the day the 12,000 still fail. Still fail. So why wait? (M3)

The high consequential risks of competitive examinations considerably affect schools when league tables are launched in the 10th Malaysia Plan which introduces a system of punishment and reward. M3 elaborated that the benchmarking initiative in Malaysia was informed by the British school ranking model and "develop (it) into a Malaysian kind of thing which suits our teachers and our human capital here". The Ministry determines the top and bottom end of the rank in order to give higher autonomy, financial grants and accountable targets to high performing schools, and implement corrective measures to weak schools. Long-service teachers are transferred in order to bring in new blood and school principals are sent on leadership courses so that schools can move up the performance ladder. The two interviewed policymakers from the Special Education Department are reserved about school ranking as the practice could inadvertently cause the neglect or reject of children with special needs who might lower the average performance scores of schools.

So this kind of thing is not a one kind of top-bottom, but everyone knows what to do at the school level themselves. They know what they have to do because you are being assessed, you are being ranked. No one for example wants to be the last. (M3)

Educational marketisation and complete institutional autonomy would not take hold in the Malaysian educational landscape in the near future, especially since school autonomy is still a new concept and private schools are still heavily controlled by centralised governmental directives to prevent the clash of interest in educational provision. Educational marketisation is not officially supported and most private

schools providing basic education are established to fulfil certain niche roles such as the independent high school for the Chinese community, private centres for children ineligible for formal schooling due to their disabilities and international schools for expatriates or locals who wish to further secondary or tertiary studies overseas. While pro-market forces are moderated by the government, educational managerialism adopted to differentiate schools and students that excel or struggle in competitive tests have imposed growing accountability pressures that affect what teachers prioritise in classroom. Schools have concentrated their focus on "the total numbers of students who sat for the exam and scored As" (M3) which inevitably leads to the neglect of slow learners who are identified for support through removal into integrated programs.

7.5 Conclusion

The enacted policy documents which are related to local student support provision seem to indicate that the discourse of inclusion has infiltrated the Malaysian education system. Support for this movement which is based on human rights and equality is articulated very clearly with the usage of phrases such as "inclusive education", "Salamanca Statement", "participation" and "school integration" in the latest Education Acts and policies. However, current educational strategies, placement statistics and discourses emerging from interview data show that Malaysia has not progressed beyond integration in its effort to provide better educational opportunities for children with special needs.

The binary distinction between the "educable" and the "ineducable" is incongruent with the inclusive ideals of promoting whole-school improvement to accommodate diverse needs. The special integrated program leaves much to be desired as a considerable majority of the pupils diagnosed with learning disabilities could be taught in regular classrooms if provided with necessary equipments, pedagogic modification and individualised learning plans. There are a number of barriers that inhibit progress such as the lack of well-trained teachers, adequate basic facilities and educational specialists capable of taking on the role of medical doctors as special education assessors. These deficiencies prolong the reliance on the psycho-medical model and the categorical approach to educational provision to the neglect of

other learning needs not clinically diagnosed. The stereotypical image of weak and dependent "disabled" students is aggravated by education authorities who believe that those students are innately academically, physically and cognitively inferior, as revealed in the interview data through the perception of policymakers. The stigma of incompetence is predetermined and unjustified even though reasonable adjustments and experienced learning support staff are lacking, consequentially students who have the intellectual capacity might be sidelined from the mainstream due to shortcoming in other faculties to be able to fit in the test-taking culture. Vocational options are likely to shape their transition from school to becoming semi-skilled or unskilled factory workers or labourers. This discriminatory educational system actively locates students with additional needs at the periphery of mainstream society in ways which contravene the seventh challenge of the Vision 2020 of developing a caring culture.

Another powerful force hampering the growth of inclusion in Malaysia is the concurrent policy initiatives that draw on neo-liberal theory such as the competitive centralised examinations and inflexible curricular standards; which inexorably put "able-bodied" students from privileged backgrounds and families of better socio-economic status at an advantage. Even though standardised examinations based on the British model have been introduced since post-independence Malaya, competitive assessments have grown drastically since the inception of neo-liberalism into policy design, especially with the launch of Level One Assessment which allows academic acceleration or "grade-skipping" at the primary level. The use of test results have gone far beyond evaluation for improvement to being the sole reference for academic tracking, central student selection for elite school admission, as well as school ranking for the award of higher status and financial reward. Although the Malaysian government is far from allowing total deregulation and marketisation, recent educational policies and strategies in the Tenth Malaysia Plan nevertheless display many features of neo-liberalism. The introduction of New Deal, standard-based curriculum, key result areas and various incentives which are attached to high-performing schools based on school ranking is solid proof of the spread of neo-liberal ideas in the Malaysian education system.

These approaches have grown by leaps and bounds in recent years and have surpassed the slow-progressing integrative policies. While the Ministry is reserved and prudent in allowing more integrated or inclusive placements, substantial rewards

and financial autonomy are generously given to top performers and elite schools. In fact, the concepts of inclusion and integration are only recognisable in the sphere of special education. However, the heavily interventionist government deters neo-liberalism from having a free reign in Malaysia as policymaking is accompanied with state interference through bureaucratic procedures. Private or semi-private educational partners are merely given guided and conditional autonomy. The Malaysian government should lessen complete dependence on results steering and school inspection to drive educational improvement, and instead focus on producing high-quality teachers and reforming school administration to carry out inclusive education to prevent dropout and exclusion.

Chapter Eight

Comparative Analysis and Discussion

8.1 Introduction

> 'Globalisation' has led to a blurring of boundaries between international and local policy agendas. However, the national context remains significant, as embedded policy mediated by local contextual factors may translate policy to reflect local priorities and meanings. (Arnott & Menter, 2007, p. 250)

Globalisation has brought about greater regional dependence and collaboration for financial stability, knowledge dispersion, technology transfer and businesses, yet it has also simultaneously heightened international competition as nation states strive to gain the upper hand of the integrated world economy. Education policy construction is increasingly driven by contemporary international agendas or systems of ideas which are transmitted through discourse. These "travelling theories" (Said, 1983) are translated, rearticulated and adopted in diverse ways in different countries as filtered by policymakers in response to local politico-cultural contexts and needs. "Neo-liberalism" and "inclusion" are two significant globalising discursive trends that have generated quite distinct outcomes in policy representations and student support structures.

Neo-liberal thinking originating from economic theories has seeped into national policy structures through propaganda and power play of major financial powerhouses such as the Organisation for Economic Cooperation and Development (OECD) and World Bank (Dale, 2000). Ball (2003) asserts that the neo-liberal policy epidemic has infiltrated the educational landscape with the adoption of market principles, managerialism and performativity. The Globally Structured Educational Agenda has gained such rapid advancement that over two-thirds of OECD countries have encouraged the expansion of school choice in the last 25 years (Musset, 2012). PISA is a tool designed by the OECD to fortify European academic attainment levels through international comparison and competition of students' ability to apply important knowledge and skills required for success in labour market entry (Grek,

2009). This globalised educational paradigm constructs excellence as the compatibility of schooling-acquired skills with matching employment requirements while schools are held accountable through targeted policy "numbers" (Lingard, 2011; OECD, 2011d). Students with disabilities are systematically exempted from PISA participation as they do not fall into the OECD focus group as potential contributors to economic development, insinuating them as unworthy of counting or resource investment.

The inclusion movement, on the other hand, aims to remove organisational and learning barriers encountered by students with diverse needs towards full participation in the formal schooling process, without the dual distinction of the "normal" general and "sub-normal" special education systems. While neo-liberal transformation at the global level is apparent in most countries, albeit at different extent, inclusion seems to have relegated to the sidelines of education agendas with a lack of clear progress since the integration movement around the 1970s, especially in developing countries where schooling opportunities are restricted to merely 1-2% of all school-age children with a disability (Mittler, 2003). Policymaking has thus become more complex than ever; embroiled in the constant conflict between setting high academic benchmark for stringent results management and striving for education for all.

New South Wales, Scotland, Finland and Malaysia have adopted, managed and developed policies deemed conducive for educational improvement, and this comparative analysis seeks to identify the extent to which educational developments in the four jurisdictions can be attributed to the global neo-liberal or the inclusive movements. The ensuing discussion flows from how the two *discourses* are represented in policy documents, their influence on educational *decision* making, in particular governance strategies and the public-private school debate, to inform the *designs* of student support structures in the four culturally unique contexts. The function, organisation, purpose and recipients of "special" provision as situated within the broader education systems are argued to be strongly related to the approach of education management influenced by different discursive ideologies. Quotes derived from interviews with five high-level policymakers per region are used in the discussion to provide substantiation and greater depth of understanding. This study is significant as it addresses the implications of global movements, likened to "an

epidemic of education policy" (Levin, 1998, p. 131), on important issues of academic excellence and equity as highlighted in PISA.

8.2 Discourses: Neo-liberalism and Inclusion as Travelling Policies in the Four Contexts

New South Wales

In the Australian federation of six states and two territories, New South Wales (NSW) comprises one-third of the country's population as the wealthiest and largest state with over 7.32 million people (CoA, 2011a). Since the 1980s, policy structures throughout Australia have been strongly affected by neo-liberal fundamentalism to promote economic democracy and internationalisation, witnessing a period of intense deregulation and the consolidation of performance-based funding under the 1992 National Competition Policy. Influenced by federal directives, intense private school lobby and parental demand for choice, New South Wales non-government schools have rapidly expanded in numbers while student enrolment in state schools has shrunk to 67% of the 740,000 K-12 schooling population in 2012 (DEC, 2012). 18% of the whole school age cohort attends Catholic schools followed by more than 15% in the independent schools (Australian Schools Directory 2012).

Apart from liberating educational markets, governance strategies have also been modified to develop a globally competitive human capital which is capable of "meeting the challenges of the changing nature of work and future skill needs" (AR2000, p. 11). The NSW government aims to achieve this goal by means of reinforcing accountability measures through "developing performance and student-based allocation" (DET, 1998, p. 89) as well as "reporting on education and training outcome to students, parents and the community" (DET, 1999, p. 20). N5 from the Evaluation Bureau of the Department of Education and Communities elaborated that the use of results-based governance is evident since 1995 by instating "fairer school information through annual school reports and assessment programs" as well as directing funding for "major enhancements relating to increased testing and performance measurement" (DET, 2000, p. 15; DET, 2010) to inform future policy. Students also face greater pressure to conform to "a standards framework of skills

bands" from as early as 1997 (DET, p. 5) through the specified "subject course performance descriptors" (DET, 1998, p. 97).

When Shanghai, South Korea, Hong Kong, Singapore and Japan rise on top of Australia in the recent PISA assessments, the concerned Australian Prime Minister, Julia Gillard, affirmed that "we must first win the education race" (Johnston & Marszalek, 2012, paragraph 15) to ensure Australian economic sustenance in the Asia Pacific. The shrinkage of upper-band scorers is particularly prominent in NSW, which N1 from the Office of the Director-General construed as an effect of overemphasising "basic literacy skills [that] runs the great risk of missing the higher literacy skills" (N1). Producing more advanced achievers is thus positioned as an urgent issue so that NSW could secure 10% of total student population in the upper bands by 2012 and 12% by 2016 (DET, 2007; 2009; 2010). Low equity is also a recurrent issue of Australian performance in PISA as 70% of between-school differences are attributable to the students' socioeconomic background, with academic selectivity within public schools and private school sector growth as contributing factors (McGaw, 2009).

Although improving educational equity is also a priority agenda, N2 explained that policy talks about reducing "segregation", promoting "integration" to the current focus on celebrating "diversity" have not led to a more concrete paradigm shift, as the focus remains "on the child's disability, not on 'what's the actual underlying issue here?'" While the call for integration to "move from the provision of predominantly segregated educational settings" (NSW DSE, 1993, p. 4) is clear, the discourse of inclusion has always been muted by the support for a continuum of placements in support provision. The parallel special education system is currently made up of 113 special schools and over 2000 support classes to safeguard "the right schooling option for your child, taking into account your choice, your child's specific additional learning and support needs and proximity to local specialist services" (NSW DEC, 2012e, paragraph 10).

Scotland

Scotland, a high-income developed country with a population of 5.3 million, became an integral part of the United Kingdom since the Acts of Union of 1707. The

devolution of education governance from the Westminster government enables the establishment of a fully comprehensive schooling system, while England has retained some academically selective secondary grammar schools catering for 4.5% of pupils in 2012 (Harrison, 2012). While most Scottish children attend publicly funded neighbourhood schools with 671,218 enrolments in 2012, 4% of total student population opts for private education from the 104 fee-paying independent schools exempted from government financial assistance (Scottish Government, 2012). Although the right of appeal for enrolment in other areas is elaborated in the Education Act 1980 to allow some flexibility, Scotland does not encourage the use of parental choice as a lever for raising quality but focuses on "universal excellence" as clearly stated in the policy document — Ambitious Excellent Schools (Scottish Executive, 2004a, p. 2).

Scottish discourse of "special" educational needs has evolved considerably from the handicap-medical-inclusion model (Thompson, 2010), where "every child matters" and deserves "the best possible start in life" (Scottish Executive, 2004b, p. 6). Inclusive learning environments are encouraged through the 2002 Education Disability Strategies and Pupils' Records Bill which affirms duties of schools to implement accessibility strategies and reasonable adjustments to suit individual needs (Scottish Parliament, 2002). The Additional Support for Learning Act 2004 further accentuates the importance of adopting "a more inclusive approach with a move away from the current negative connotations of SEN, which has too much of an emphasis on weaknesses and problems" (SEED, 2003b, p. 13). Constant references to the aspiration of creating inclusive schools are also made "which welcome pupil diversity and develop an ethos and values which promote pupils' educational, social and cultural development" (p. 23). Student support policy development has over a decade been revolving around the theme of inclusion, notably signified by "the presumption of mainstreaming" (Riddell, 2009, p. 7, SEED, 2006b, p. 1; Scottish Executive, 2002, p. 1) enacted within the Standards in Scotland's Schools Act 2000.

Although reputed as a well-educated nation by international standards, Scottish performance in PISA registers a diminution of upper-band percentage and lower-end increase among their 15-year-olds over nine years. Of particular concern was that underachievement is most prominent in the later stages of primary and early secondary basic education as well as among socioeconomically disadvantaged

students (OECD, 2007b). The situation raises a fundamental question as to how the comprehensive ethos central to Scottish education policymaking fall short of a more undivided result. Heightened anxiety among Scottish policymakers can be observed in a subsequent report entitled *Raising Attainment* which speaks of "transforming the way in which children learn for successful futures" (Scottish Government, 2012b) through promoting higher academic expectations and intelligent use of assessment data (Buie & Hepburn, 2012). Correspondingly, the newly implemented Curriculum of Excellence contains a wealth of neo-liberal discourse by calling for a "comprehensive system for reporting against standards and expectations [to be] compared with local, national and international benchmarks" (The Scottish Government, 2010, p. 13). Nevertheless, the Scottish Government (2009) stresses that assessment and qualifications should "complement the curriculum but do not drive it" (p. 9), but to take into "full account of each learner's individual needs and stage of development" (p. 13). Widespread market mechanisms of consumerism and competition have not gained a strong foothold within the Scottish democratic tradition as the accountability measures are not accompanied by consequential actions if schools fail to satisfy the benchmarked targets. Scotland appears to have been more influenced by the discourse of inclusion than the discourses of neo-liberalism.

Finland

Despite having a comparatively small population of 5,364,000, Finland has for four times in the last decade topped the economy competitiveness chart by the World Economic Forum (Sahlberg, 2007). Finland is however rapidly growing into a multi-cultural society with influx of migrants from the European Union, resulting in some urban schools having 50% of immigrant enrolment (Sahlberg, 2007). The country possesses characteristics of a technologically advanced welfare state, having attained full literacy rate since 1980 with virtually no corruption and the lowest poverty rate among OECD countries (Nation Master, 2008). Hefty tax revenue also enables the government to channel sufficient funds to frontline public services such as education, social welfare and healthcare for an effective collaborative support to accommodate diverse student needs.

Rights, welfare and inclusion have always taken precedence in policy formulations as the main political and cultural paradigms in the Finnish society. Although economic competitiveness has been underlined in governmental reform after the global financial crisis, the Finnish Ministry of Education and Culture states that "safeguarding welfare services must continue to be the underpinning of measures" (OKM, 2008a, p. 4) and all service provisions should aim "to strengthen inclusion and communality" (OKM, 2010a, p. 28). The Basic Education Act 628/1998 has remained as the yardstick for other policy developments which clearly states that "the aim of education shall further be to secure adequate equity in education throughout the country" (Finnish Government, 1998, p. 1). The subsequent 2010 amendment further strengthens students' entitlement to sufficient support for learning "immediately when the need for support becomes apparent" (NBE, 2010, p. 3). The discourse of inclusion has been articulated increasingly prominent from the support of mainstreaming for students with a disability to evaluating "schools as learning environments and as part of the education system and the surrounding society" (NBE, 1999, p. 7).

> Inclusion in the sense that every student has a right to go to the nearest school, to get support every day. We have to think [of] the child first and the forms of support he or she needs and *then* solve the question how we should organise the education. So it always starts from the needs of the child. And not from the needs of the system. (F3)

Finnish decade-long high achievement in PISA has raised eyebrows among OECD participants as its comprehensive basic education based on "equal selection criteria" (Basic Education Act 1998, p. 12) is immensely disparate to the educational models from the United States and United Kingdom which emphasise national benchmark, competition-driven academic excellence and school choice. Resistance towards market mechanism and results-based public managerialism is upheld by the Teacher Union which has a strong voice in the tripartite framework that enables consensual agreement on public affairs to be made collectively with various Ministries and municipal representatives (Routti & Ylä-Anttila, 2006). Such close collaboration is the key to progressive policy development in support of inclusion in the last three decades. The director of the Ministry of Education's Center for International Mobility,

Pasi Sahlberg also mentions that "there's no word for accountability in Finnish" which certifies that neo-liberal mode of governance has yet penetrated the Finnish education discourse (Partanen, 2011, paragraph 17). While neo-liberal resistance is adamant, Finnish educational and political discourses have persistently supported academic and social inclusion in policy and practice.

Malaysia

Malaysia has made vast achievements since its independence in 1957 from the British colonial rule as one of the fastest growing economies of developing Commonwealth countries with a population of 29 million (Index Mundi, 2012). School choice is still limited in basic education and public school enrolment was recorded at 5.3 million in 2008 which highly contrasted to only 113,795 students from higher income families opting for private schools (Nation Master, 2011). As a partial welfare state, the Malaysian government has always prioritised poverty eradication, educational accessibility, economic diversity and international trade towards the realisation of Vision 2020 to gain the status of a developed nation. Malaysia has long adopted neo-liberal ideas from the World Bank to prioritise management for results, by "strengthening financial monitoring activities" (MoE, 2010, p. 13), evaluating learning outcomes, cost-effectiveness and financial returns of student support services and vocational programs (MoE, 2008a). The Government Transformation Program was simultaneously launched, similarly emphasising development of human capital in globally competitive environments based on the slogan "One Malaysia, People First, Performance Now".

> What success will look like. Firstly, standards for student outcomes and learning practices will be benchmarked and aligned with that of high-performing education systems so that the students Malaysia produce are globally competitive (MoE, 2012, p. 32).

The priority given to high-stakes evaluation and achievement standards has contributed to the persisting deficit model of "special" education. Contradicting the inclusive notion of "Education for All", the concept of educability was established in the early 1900s to absolve teachers from blame for students' failure through exclusion

(Kauffman & Krouse, 1981). While this demeaning social construct of ineducability lasted from 1940s to 1970s in Scotland and Australia, Malaysia has maintained such distinction, thus statutorily mandating the deprivation of educational rights of many disabled children who are relegated to social welfare rehabilitation centres, justified by their inability to "manage themselves without help" according to the 1997 Special Education Regulations. Nothing much has changed since the Education Act 1961 which brought into effect "special educational treatment" for "several categories of the pupils" in segregated settings for normalisation and adaptation into the contemporary society (section 10).

Malaysian policy discourse has a strong exclusive voice, with some inconsistent and contradictory references of inclusion and integration in piecemeal legislations and education plans that reveal a lack of commitment, understanding and sincerity. Failure to account for support obligations is evidenced by its unsatisfactory outcomes in the latest PISA assessment as half of the total cohort on average did not acquire the minimum literacy, numeracy and scientific skills (below band 2) required to contribute to the local knowledge-based economy. Consequently, response strategies to raise student competitiveness have been carried out through the incorporation of at least 75% higher-order thinking questions in all standardised primary and secondary examinations by 2016 (MoE, 2012). The Literacy and Numeracy Screening (LINUS) program was also introduced in 2010 for nationwide screening and student participation rate in the Science stream is targeted to rise from the current 29% to 60% over five years. All these measures aim at lifting Malaysia's performance to be "at par with international average at the next TIMSS and PISA cycle" (MoE, 2012, p. 46) and further elevate to be in the top third of countries within 15 years (p. 63). While a strengthened emphasis on results-based management can be observed in Malaysian educational discourse, the deficit discourses of disability have endured without much progress for inclusion. The top-down influence of inclusive and neo-liberal discourses is further dissected into more refine level of policy practice from a comparative lens to gauge similarities or differences along with systemic impact on students with additional support needs.

8.3 Decisions: Relative priorities in policy development

a) Education Governance and Academic Standards

> Most of us educationists, examination is just one way to know students'
> progress but unfortunately for Malaysia…the only measuring criteria for
> us is using public examination. (M1)

Educational decisions in Malaysia are framed strongly on the basis of results-based management through academic selectivity, ability streaming and tracking which directly prompts the exclusion of less academically talented students. The modus operandi of all Malaysian government schools is nearly congruent through centralised public management and frequent inspection. The "core business" lies in sorting students in different ability groups based on test scores and individual positions in the whole-school ranking ladder since primary levels which intensifies through to year 3 of secondary schools where higher achievers are channelled to the science stream while top students enter elite science schools.

> In examination, those are good they will go to higher education. Those
> who are in the middle, they will do what they can. And also for those who
> are not good with Es and Fs in the exam, we will put them to vocational.
> (M2)

Low tolerance towards the disabled community has endured and their educational rights and accessibility are persistently being marginalised in policy and resource priorities as the general education structure is rigidified with competitive assessments and expectations. The recent school-ranking practices have further discouraged the integration of students with additional support needs lest the school's average academic score is affected.

> Under our national key results area with the incentives provided, schools
> are being ranked. So some schools feel that if they don't have special
> education children, probably they will be ranked higher. (M4)

Warnock (2005) states that "the greater the pressure to raise academic standards, the worse the fate of those who could never shine according to such standards" (p. 21). The Ministry's demands for higher passing rates and exceptional scores in state-wide tests have put schools under severe strain, thus eliciting educational triage by concentrating precious resources and time on the "hopefuls", who are sorted and placed in the top few classes of each grade level. The system projects a utilitarian structure by methodically organising students based on a normally-distributed performance measurement, and students with additional support needs at the lowest end of the spectrum are deemed "ineducable" and placed into community-based rehabilitation centres (CRC), special schools or classes. Such stringent accountability measures create a tension between better academic outputs of schools and the position of vulnerable pupils.

> Students have to be managed based on their exam results, so we know whether they can follow mainstream or not, or *Pusat Pemulihan dalam Komuniti* (CRC)... Best students there are MARA and Science Schools for them. (M5)

In contrast, the Finnish Local School Administration Act 1983 and Scotland's Act 1998 have introduced devolution schemes to extend decision-making powers to local authorities. The 2007 Concordat produced the Single Outcome Agreements in Scotland which specifies the relationship between central and local government founded on partnership and mutual respect, as "the freedom to be able to make the decisions about how to get towards those outcomes are best made by those at the local level" (S2). Finland has succeeded in delivering excellence through intelligent accountability where state-wide inspection and mass standardised testing are abandoned and replaced with a system of comprehensive, non-selective and test-free basic education that bestows high amount of trust towards teaching professionalism.

> Why teacher professionalism is very popular in Finland? In Australia, they don't have that kind of respect of the teachers, it's in the Finnish culture. It's in the society that teachers are respected or not, they must earn the respect, and we know that they have the capacity to solve the problems. (F1)

Devolution of power is balanced with soft methods of steering, including a national core curriculum which issues broad guidelines for the design of municipal and school-based curricula since 2004. F3 repetitively stressed the importance of cooperation and professional trust through stakeholder empowerment and supportive government input as opposed to employing public accountability, intervening control and high-stakes testing.

> The ethos of the system is based on cooperation, interaction between people, trusting on teachers and schools, supporting them and not controlling them, not [conducting standardised high-stakes for] testing students, pupils. And not intervening in a controlling sense, but *intervening* in a supporting sense. (F3)

Delegation of educational leadership has enabled professional freedom and school autonomy in budgetary and curricular planning based on local needs and optimal usage of resources which is impossible to be executed in the inflexible examination-heavy Malaysian education system. The Finnish devolutionary reform has led to collaborative teamwork, constructive professionalism, active learning pedagogies, thematic teaching and whole-school improvement towards inclusion (Halinen & Pietilä, 2005; Kartovaara, 2007; NBE, 1994, p.20). F3 recounted the dynamic working environment with all stakeholders.

> My phone is ringing all the time – so parents, teachers, sometimes even students contact us, "Now I have this kind of problem, what should we do? And I often give advice that, "You should do like this." But I can't say that, "You must!" (F3)

While national assessments commence from secondary three through to year six in Scotland, Finland only has one high-stakes matriculation examination at the end of upper secondary education to determine university entrance. Similar to the Scottish Survey of Achievement, random sampling of schools is regularly conducted in Finland to garner information on average standards of learning outcomes at the national level and "to guide and encourage learning" (Finnish Government, 1998, p.

9) without inflicting upon students the stress to perform in high-stakes assessment through superficial learning.

> So it's not stressing for teachers and students, it doesn't take too much time for learning, re-learning, and it's economically efficient and it gives enough information for us to know how we are doing as a nation – the approximate level of student achievement. But if we would just test them, it's much, much more mechanistic idea of learning, so it's a different idea what good learning is. (F3)

The Scottish government also faces contradictory pressures to enhance redistributive strategies while advancing "the new managerial focus on culture, excellence and entrepreneurship" (Newman, 2001, p. 31; Scottish Qualifications Authority, 2007). Regulatory strategies inspired by the new public management theory to steer policy at a distance have been adopted recently with the invention of a new national Curriculum for Excellence with a modernised assessment format. It attempts to ensure "all learners receive appropriate recognition for their achievements in line with agreed national standards and are progressing in line with expectations" (Scottish Executive, 2011, p. 3). Educational achievements are not the sole focus as quality indicators within "How Good Is Our School" inspection guidelines also cover capacity for self-evaluation, educational inclusion and continuous improvement (HMIE, 2006a; HMIE, 2007a). Hence, "professional modes of accountability" (Arnott & Menter, 2007, p. 258) still underline these recent reforms as primary education remains free from large cohort standardised testing. Nevertheless, the pressure of schools attaining national standards certainly exists which is uncommon in Finland.

> There's a tension in terms of accountability, and raising standards, and having the time – time is an issue. If you're the only teacher, and you have children who require particular time and teacher effort to support them, while you have others that you need to be challenging at the top end. The tension between achieving the best for everybody and actually meeting the needs of individuals is a tough challenge. (S3)

Policy support of inclusion, although staunch and consistent, has not been able to undo educational inequalities caused by expanding socioeconomic discrepancy between and within local authorities and residential areas. The lack of success can also be attributed to "a lot of inconsistency [in] how well legislations are implemented" (S4) and the inadequacy of funds "to broaden engagement and to widening access" (S1). S4 voiced similar concerns that "certainly in terms of rhetoric, the focus on inclusion issues is fairly high, but whether the action compares in the same way". Cities also become "magnet providers of special school placements" (SEED, 2006b, p. 2) due to "the economies of scale in support of cost-efficient, concerted resourcing for targeted students" (S6).

Although full-scale streaming is not the norm in Australian education system, special placement tests are conducted in NSW to screen for "highly-achieving, academically talented students" into the present 46 fully and partially selective high schools (NSW DEC, 2012c). Academic and social discrepancies are compounded as the private education sector and the selective schools "take the cream and the least disabled out of comprehensive community school" (N1) which consequently holds the lowest market value in terms of prestige and attractiveness. The federal government has further exacerbated these trends by setting a nation-wide benchmark through NAPLAN and publishing school performance on *My School* Website to promote information transparency to the parent consumers (Angus, 2012). As a state system that is dependent on Commonwealth funding, NSW participates in this quality assurance strategy that compares schools on the basis of similar socio-economic student composition; a comparative approach which might prove futile as lower achievements are unrelated to schooling practices or teacher performance (Lingard, 2010; Lingard & Sellar, 2012; Stobart, 2008).

Educational governance in NSW has correspondingly shifted from the monitoring of input to a strong evaluation framework. N5 shared that the government tends to apportion resources based on speculated investment returns through "value-added models, what you get over what you invest". Limited school resources and teachers' time could be increasingly funnelled to students who are more likely to reach targeted benchmarks under the accountability pressure of national partnerships (Gillborn & Youdell, 2000). Schools also incline to recruit bright students who are "the effective consumer and the value-adding client" (Ball, 1993, p. 8) and reject

those with "special" needs who could lower average school achievements, emulating the corporate mentality (Teese, 2012). N2 pointed out that the "special "child might be perceived as a "problem", with a growing tendency for schools to remove disruptive students, thus partially leads to the continual growth of special class placements as a form of internal segregation (Graham & Spandagou, 2011).

b) Educational Marketisation

With a centre-right liberal party, NSW has adopted the market mechanism of school choice since the 1980s under the assertive influence of the Commonwealth government to enhance competitiveness and drive higher standards. Although educational equity is an important goal and investment, residualisation of comprehensive public schools is evident with the private education sector consistently expanding to the current 33.7% total enrolment. School-level decision-making is further encouraged to promote individual school profiles in the educational markets through *Local Schools, Local Decisions* (NSW DEC, 2012f) to show "what they provide that the school down the road doesn't" (N2).

Lower educational accomplishments have been persistently attributed to Australian government schools which have 19% of their publicly enrolled students unable to attain at least band 2 of reading skills on PISA proficiency scale. This figure is twice the percentage of Catholic schools while independent schools excel with the lowest 5% underachiever and the highest 22% of top-performing students obtaining reading literacy competence of level 5 and above, followed by 14% within Catholic and merely 10% within public schools. The striking academic differences are directly borne out of socioeconomic disparities, with a concentration of underprivileged students within the public system (Thomson et al., 2010).

The private school marketplace thus serves as a basis of educational inequality as it is more accessible to financially more privileged students and even some Catholic schools have become unaffordable although relatively much lower in fee than the independent schools (Price, 2007). N4 from the NSW Planning and Innovation Unit reaffirmed that all the States had delivered on Commonwealth's reform agenda at significant costs. The general mistrust towards the quality of public schooling in NSW has grown as the society adopts the mentality that private and fee-

charging provision is always better, with the exception of the highly competitive selective government secondary schools that remain highly sought after by parent-consumers. NSW stands alone among the studied jurisdictions in allocating central and state funds to fee-paying non-government schools without instating any requirements for transparency or accountability.

This practice contradicts Malaysian public schools that are granted "high-performing" status along with monetary incentives; albeit being partially freed from bureaucratic entanglements, they face increased accountability to attain contracted standards. Elite schools have thus expanded but student selection is centrally administered based on individual aggregate scores in national assessments which is vastly different from the notion of educational marketisation. The trend of private schooling remains low at 2% of total enrolment as the costly fee is not affordable for the general population. As a multi-racial developing country, M5 emphasised the importance of preserving a collectivist governance structure with a tight monitoring of private establishments to foster social solidarity and cultural conformity.

In Finland, besides obliging private schools in adhering to central curricular guidance, equity strategies and non-fee provision, parental choice is discouraged by withholding financial assistance to schools exceeding the optimum enrolment capacity as well as removing free transportation services for children who attend schools outside their local areas. Fee-free Private schools which are proscribed from the "pursuit of financial gain" (Basic Education Act 1998, p. 4) have only attracted 2% of the student population. As between-school difference is negligible and virtually all schools offer equally high quality services, the niche area for private establishments is extremely restricted and the local school is the best choice. Students' performance is also relatively less affected by the family's socioeconomic status (Lietz, 2009; Välijärvi et al., 2007).

In Scotland, parental choice is unfeasible in sparsely populated rural areas but the cities have witnessed an increase of placement requests, oversubscription of popular schools and enrolment percentage of private schoolers that are much higher than the 4.3% national average. Inner-city movements of pupils to middle class areas are not uncommon in Glasgow, Edinburgh, Aberdeen and Dundee (Scotsman, 2007), resulting in wide differences in the social composition of schools between various

catchment areas as early as 1987 (Raab & Adler, 1987). While the reviews of Scottish national policies undertaken by the OECD (2007) reveals that "*who you are* is far more important than *what school you attend*" (p. 57, italics added), schools situated in areas with higher levels of deprivation tend to experience a residualisation effect as the enrolment base is "left with this very residual group of very needy children" (S5) from families of lower social status who do not have the means to mobilise out of those local catchment areas. Yet, school markets are still limited to urban areas which are relatively meager in number and less widely distributed compared to the expansion of NSW non-government education sector. Self-promotion is also rare among Scottish public schools.

> Every school will produce a handbook to provide information to parents,
> but not in a hard sell of "I'm selling my school, and it's better than..." (S2)

The proportion of between-school variance in performance accounted for by the ESCS index (economic, social and cultural status) in PISA 2009 has quite accurately reflected the social stratification impact of school marketisation as Australia leads with a high 18.6% and followed by Scotland at 14.4%. Finland and Malaysia have relatively much lower figures at 2.1% and 8% respectively. 25% of early school-leavers are concentrated in the 5% disadvantaged postcodes areas across NSW (Bond, 2009). The liberation of market choice in the education sphere, more rampant across NSW and the major cities along the Central Belt of Scotland, regrettably has not brought about equal benefits as parents with more socioeconomic resources are better equipped in purchasing or arranging the desired quality education for their children than those from impoverished, minority and less-educated background. School markets have in fact prolonged "the reproduction of relative social class (and ethnic) advantages and disadvantages" (Ball, 1993, p. 4).

8.4 Designs: "Special" Education Support Systems

Inclusion is a multi-dimensional concept centralising on "deep change to school cultures, structures, practices and logic" (Graham & Sweller, 2011, p. 14), a process of "addressing and responding to the diversity of needs of all learners" as well as "reducing exclusion from education" (UNESCO, 2005, p. 13). Although the policy

endorsement of mainstreaming is most emphatically revealed in Scotland, Finland has implanted the principles of inclusion in its school culture and the comprehensive, widely accessible and effective student support structure. Scotland has a fairly equitable system which has great potential to fulfil greater educational equity if academic disparity associated with social class and local authority variation can be effectively reduced. There has not been any solid evidence to support that Scottish schools are more inclusive than prior to the enactment of the Additional Support for Learning Act.

> There is a real degree of segregation between disabled and non-disabled children. Most of them were in special school, so that may have added to that sense of being kept entirely separate – in a different world, with lesser chances. That certainly was their view, very strongly. Very strongly! (S4)

Finland has succeeded in curtailing dropout rates from basic education (Year 1-10) to 0.3% and upper secondary graduation (Year 10-12) to 7% in 2010. These figures are exceptionally low by world standards. Proactive and effective learning support consolidated through an on-going and multidisciplinary framework directly contributes to the inclusiveness of Finnish education system and is reputed to be a vital factor behind the excellent PISA results (Koivula, 2008; OECD, 2005). The high volume of students who have been served with individualised coaching in the mainstream environment is unparalleled with any other countries. Thus, the stigma associated with disability diagnosis and the boundaries between students with and without "special" needs are considerably minimised.

> We have now moved from the medical model to the pedagogical model. What kind of support is needed, what are their strengths, where we can build their education. In the official decisions that we have with pupils with needs in special support, there are no more medical or psychological statements in legislation. (F4)

While many nations aspire to have equitable educational provision and achievements so that no child is left behind, most have adopted categorical systems of support allocation "ring-fenced" by a medical model that is expensive to maintain and

retrospective in its delivery (Graham & Jahnukainen, 2011). The process of inclusion in Finland is unique in the sense of the role played by the part-time remedial education in carrying out early intervention during primary basic education in mainstream setting, whereas provision peaks in the secondary school years in Malaysia and NSW.

> Part-time special needs teaching, that is the most important thing that we have. If the child, when he comes to school for the first class in August, if he or she can't read before Christmas, there is a problem! The special needs teacher is giving extra support in reading and writing, and it is almost thirty per cent of those who are starting school, first or second graders. (F4)

This difference in focus has deep implications for curricular access in the upper grades of school. Support provided in time prevents the attrition noted around the Year 5 "choke-point" where many students fail to master the necessary skills to advance to the next grade which might result in the increase of school dropouts and grade repetition (Graham, Sweller & Van Bergen, 2010). On the other hand, the "wait to fail" approach fails to intervene and address potential problems which are encountered by some students at an early stage and this might lead to even more entrenched difficulties later on. N2 elaborated on a similar situation in the NSW context where instructional failure and delayed education support led to preventable "academic incompetence" among many students. Consequently, they may then be identified as having "special educational needs" and given various medical diagnosis such as learning disabilities and social, emotional and behavioural disorders (Itkonen & Jahnukainen, 2007; Graham & Jahnukainen, 2011; Graham, Sweller & Van Bergen, 2010).

> There is some poor teaching. Some kids obviously manage the poor teaching, and get through the other end, but obviously a large number of kids *don't* manage that poor teaching very well... There's a lot of kids that obviously haven't learnt to read because they haven't been instructed in a way that meets their need. (N2)

The Year 7 – 12 apparent retention rate in NSW was 70.8% in 2010 and school dropouts were over-represented by students with a disability, from remote locations, from regional locations, from low SES background and Aboriginal students (NSW DEC, 2011). While Scotland and Finland provide flexible reasons for support based on "additional support needs" and "grounds for special education", the categorical funding allocation method in NSW has become the means to several ends: funding, diagnosis and student removal (Graham & Jahnukainen, 2011). To curtail the use of diagnosis for gaining additional school funds, *Every student, Every School* has been implemented in 2012, which put in place a functional assessment tool for evaluating and documenting students' needs in various school-related practical tasks (NSW DEC, 2012b). Nevertheless, NSW still adopts the retrospective medical approach towards support provision which still lacks a preventative framework as it "recognizes the type of disability that a student has rather than the additional educational needs of each student" (DEC, 2012, p. 5).

Malaysia similarly adopts a two-track approach of general and special education systems (Meijer, 2003) which are regulated under separate legislations. The isolated governance of special education and social welfare system for the "educable" and "ineducable" students with disabilities is illustrated by Thomas (2012) "as a separate territory from mainstream education, with its own discourses, policies and practices" (p. 3). Its lowest 0.05% special school enrolment stands out among the four jurisdictions but at least 3.9% or 125,312 'ineducable' students with physical and intellectual deficiencies are enrolled in hospital and rehabilitation centre in 2007, with a much larger unknown pool patronising the private sector or neglected at homes and care centres (UNESCO IBE, 2009). The diagnosis-oriented medical approach screens and groups students into the mainstream, integrated and rehabilitative placements by evaluating the severity of their disabilities. This overt form of institutionalised discrimination is built upon socially-constructed beliefs of students' innate inadequacies; whilst they are in fact "the casualties of an inflexible, insensitive system of education" (Falvey & Givner, 2005, p. 6) that determines the worth of students based on test scores and remove those who could not "acquire the level that is expected of teachers at that age, at that level of education" (M4).

8.5 Tensions between Equity and Efficiency

To conclude, accountability mechanisms that are established purely for the promotion of academic standards and staff monitoring can lead to some undesirable side effects in the absence of inclusive governance, collaborative problem-solving and professional trust. The persistence of high stakes testing reforms in Malaysia and Australia constricts learning goals to measurable outcomes which has failed to generate improvement across an entire system as the national benchmarks specify expected "normal" learning rate with a tendency of neglecting the individuality and different circumstances of each child. Consequently, the expansion of special education reflects one of the side effects of schools opting for segregative placements due to their incompetence in coping with huge numbers of young students defined as unable or unwilling to fit into the regular education system (Tomlinson, 2012). Governments should also re-evaluate their conviction that marketising education would bring about widespread schooling improvement as the segregatory impact of choice and differential school branding in NSW and Scotland's main cities has shown that the market approach is antithetical to inclusion and equity goals. The promotion of a first-rate universal public education is conducive to more equal outcomes, as exemplified in Finland, although welfare availability and other social factors for instance socio-economic equalities and community cohesion bear upon this correlation.

Finland has equally shown that educational quality and equity are not necessarily in competition with each other as concurrent attainable aspirations, as improvement can be realised across an entire education system through its effective student support infrastructure. F4 clarified that previous concerns that the Finnish comprehensive education would lead to a lack of "the talented, the most skilful" students are unfounded as "the PISA results show also that we have the stars". The government approach of intelligent accountability does not reflect apathy towards educational excellence and international competitiveness, but as a cost-effective measure to channel essential funds towards teacher training and schools. In recent years, global financial insecurities have in fact prompted an increased emphasis on fostering a closer connection between working life and educational process (OKM, 2008b). Enhancing competitiveness and safeguarding welfare provision are equally

underlined in the Strategy 2020 which takes into account socio-cultural, global and workforce trends in the new operating environment (OKM, 2010a).

> Internationalisation, the global economy and Finland's integration into the European Union have meant that the fluctuations of the world economy and the effects of competition in the world market are increasingly felt in Finland. The role of research, innovation, product development, and specialised world-class knowledge and know-how is growing as a component of global competitiveness. (OKM, 2003, p. 4)

The difference lies in the underpinning equity-based approach in the Finnish education system which does not discriminate students based on their academic abilities, as a completely opposing practice to selective performativity. The focus on real-life knowledge application in its curricular objectives, as well as the training of professional teachers who are capable of delivering high-quality instruction for all students, has on the contrary contributed to Finnish high standing in PISA (Kupianen, Hautamäki & Karjalainen, 2009).

8.6 Conclusion

The OECD PISA data has shown that educational equity and efficiency can be achieved through success stories of some national economies providing high quality education with impressive equal and excellent learning outcomes. Finland, which has upheld social democratic values and resisted the invasion of neo-liberal ideas into public good services, is able to preserve the comprehensive educational tradition that emphasises the promotion and protection of human rights and equal opportunities to access quality education regardless of individual differences. National economic prosperity and human capital competitiveness in employment-related competencies are also Finnish government's high-priority goals. However, the imperatives of the market in education have been assiduously resisted while collaborative efforts and professional trust based on devolved powers to municipalities and schools in determining curricular content and assessment composition holds greater value than national performance steering.

The discourse of inclusion has a strong effect on policy formulation in Scotland and Finland which is reflected in the endorsement of mainstreaming and the adoption of a staged intervention approach to prevent entrenched academic failures by systematically identifying, assessing and supporting children with "special" needs within a multi-agency framework. Such societies with egalitarian frameworks tend to situate within the high quality/high equity quadrant in PISA assessment, achieving educational excellence as well as more equitable distribution of results (McGaw, 2006; Wilkinson & Pickett, 2009). Although the OECD *Reviews of National Policies for Education* acknowledged Scotland as one of the high-performing countries with a strong commitment to developing equity-based basic education (OECD, 2007b), the persisting academic decline in Scotland shows that the wider socio-economic inequalities bear a strong influence on students' learning outcomes which is impossible for schooling improvement alone to overcome. Schools, on their own, cannot be entirely inclusive when the rest of the society is becoming increasingly socially and economically polarised.

Neo-liberal policies also cause high-level impact which affects attainment and special education. The notion of neo-liberalism is polysemic with unique representations in different contexts. The advances of neo-liberal economic policies are much less evident in Finland and Scotland, albeit a much stronger focus on employment skills and competitiveness is reflected in the Scottish Curriculum for Excellence and the recent Finnish ministerial strategies 2020 in response to several causes — the exhortation of OECD, the declined PISA performance and the escalating economic uncertainties (OKM, 2010e; Scottish Executive, 2004a). This approach to education implies a redefinition of learning and its purpose, by narrowing the focus of the curriculum towards skill-based literacy, numeracy and scientific outcomes.

In Malaysia, neo-liberal ideology manifests most clearly as intensified academic ranking, selection and streaming for the excellent schools and students with the greatest "number of As" (APK, 2012, p. 3) for participation in the field of science and technology. The results-based managerialist governance to raise academic achievement in Malaysia has also thwarted the development of inclusive education and placed the country in the low quality/low equity quadrant of PISA. Pupils who could not fit into the mainstream competitive culture are simply perceived as

physically and intellectually flawed which justifies their placements into segregated settings or rehabilitative centres. Educational improvement should not be attained through competitive means at the expense of the essential rights and inclusion of others. Governments' decisions to allot munificent incentives with educational excellence evidenced by anticipated academic "returns" and improved skill levels of individual schools are prudent investment strategies to drive results, such as the reward gained by Malaysian high-performing schools and Australian schools that attain or exceed national partnership targets.

The NSW government has incorporated social justice objectives in its educational services and various equity programs to construct a high quality and fair education system, yet educational inequalities has persisted with disadvantaged and minority students over-represented among school dropouts. The dramatic growth of socioeconomic variance in Australian PISA achievement shows that the link between educational performance and social background of students has strengthened. The huge private education sector, selective high schools, national learning benchmark and the associated federal performance reward have all contributed to the dominance of market agenda, competition, consequential accountability and renewed focus on competence and marketable skill levels in NSW. These policies have inadvertently divided communities by giving added advantage to individuals with more economic, cultural and social capital. Although the government invests heavily in public schools to raise standards and educational equity, education has partially become a consumer good as it conforms to the national competition policy to remove barriers towards private establishments in all spheres of governance.

This phenomenon is not peculiar to NSW as inequalities within societies have dramatically widened in most OECD countries over the past three decades (OECD, 2011a). This significant indicator of social ills is not conducive to economic productivity and educational equity (Wilkinson & Pickett, 2009), while neo-liberal marketisation prolongs the vicious cycle of hierarchical social reproduction. With a small percentage of students enrolled in fee-free private schools, Finland maintains comprehensive schooling that is free, publicly maintained, high in quality and accessible to all in their local neighbourhoods. Basic education provision is rarely seen in the light of marketable commodity in Malaysia and Scotland as the size of private sector has been quite stable and small and there is rather low student

movement between different catchment areas, although more prominent in the major cities. Jurisdictions which have a stronger neo-liberal orientation in their social policies, manifested in the creation of school markets, are less likely to be successful in delivering inclusive school systems and closing the achievement gap high and low performing schools. A key question is whether non-inclusive systems are sustainable in the long term.

Throughout this research, interesting themes and gaps have emerged which have raised implications for future research. The association between social deprivation and special education needs should be further explored to add insights into how disability may be socially constructed. Also, as the focus of this study lies in policy decision-making, school-level observation centering on the effects of inclusive or neo-liberal ideologies may be an important area for new research to strengthen the findings. Although Finland and Scotland have explicitly promulgated the support of inclusion, the policy rhetoric of inclusive education for students with a disability can be traced to different extents and in different forms across the four jurisdictions but more commitment is required to match it with reality. A policymaker from the Disability Programs Directorate provided an apt example through the NSW Centre for Effective Reading which offered reading support to primary school students in rural areas who could not master basic literacy skills. This early intervention measure which attempted to facilitate better accessibility to education support mirrored an inclusive intent of the NSW government, yet received heated criticism from the media and parent action group due to a lack of engagement and time investment for positive results to develop. It is important that good policies must be followed by proper implementation and continuous reviews across all levels until the goals are achieved.

> I believe we've got documents, policy statements, that are really good, but it's limited by the way that people interact with it. So it's not about, always, policy; it's about the rigour, then, that's attached to making sure that schools are implementing – and, once again, the intent behind those things. (N2)

Although more children with special needs are included in mainstream schools than a decade ago, it is the aspiration of this research that students with a disability can more successfully break free from isolation and stigma caused by unhealthy policy and

school dynamics; and become enabled individuals with the academic, emotional and social support of an inclusive school community. The second Finnish policymaker interviewee from the Department of Education and Science Policy shared his insight into successful policy implementation through experience. As "one element of the education system affects the other parts" (F2), educational reforms must be comprehensive, well-supported, constantly evaluated and complementary with other aspects of the system to prevent policy clashes and ensure viability. His saying accurately reflects the embedded inclusiveness of the Finnish education system which is built upon the active resistance of high-stakes testing and performative selectivism based on market-driven education governance.

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The 'Russian doll' approach: developing nested case-studies to support international comparative research in education

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Abstract

International comparison is complicated by the use of different terms, classification methods, policy frameworks and system structures, not to mention different languages and terminology. Multi-case studies can assist understanding of the influence wielded by cultural, social, economic, historical and political forces upon educational decisions, policy construction and changes over time. But case studies alone are not enough. In this paper, we argue for an ecological or scaled approach that travels through macro, meso and micro levels to build *nested* case-studies to allow for more comprehensive analysis of the external and internal factors that shape policy making and education systems. Such an approach allows for deeper understanding of the relationship between globalising trends and policy developments.

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The 'Russian doll' approach: developing nested case-studies to support international comparative research in education

In a small shop in a snowy village in Russia, Nikolai the doll maker was carving his last matryoshka. From one piece of soft wood he shaped six nesting dolls, each one fitting inside the other. They all opened in the middle and were hollow inside, except for the littlest. She was the size of a bumblebee and she was made of the heart of the sweet-smelling wood. (Corinne Demas Bliss 1999)

It is possible to examine one's own system critically from the inside, but it is more difficult without a comparative perspective. But the existence of alternatives obliges us to justify rather than to assume, so that if we do adhere to something, there is a chance of knowing why we do it. (Grant 2000, 315)

Introduction

Education systems, policies and individual school practices are the products of specific cultural settlements, belief systems, historico-political allegiances and national aspirations. The comparison of these systems – and that which constitutes them – can work to highlight trends, both unique and universal, as well as their differential effects. Such research can provide policymakers with insights as to how a particular initiative may travel in their own jurisdiction; thereby avoiding mistakes made elsewhere. However, international comparison is complicated by the use of different terms, classification methods, policy frameworks and system structures, as well as different languages and terminology. Further, while multi-case studies can assist understanding of the influence wielded by cultural, social, economic, historical and political forces on education policy decision-making and system design, geographically "bounded" case studies are not enough. In this paper, we argue that a scaled approach that travels through macro, meso and micro levels to build *nested* case-studies allows more comprehensive analysis of both external/global and internal/local factors that shape policy making and education systems.

The genesis for such a framework lies in seminal works in comparative education that have called for embedded analytical approaches that can offer richer datasets capable of producing contextualised, accurate and more authentic research findings (Broadfoot 2000; Crossley 2000). For example, the need for 'ecological validity' was first discussed by Crossley and Vulliamy (1984) who, since environments strongly influence the development and structure of education, argued the necessity of placing analysis in a broader historico-cultural, political and socio-economic context. Other leaders in the field have since emphasised that context should be probed beyond mere description to incorporate social and cultural processes (Crossley and Broadfoot 1992; Broadfoot 2000). This was more recently reinforced by Vulliamy (2004) who, in response to the increasing dominance of positivism, argued for greater synergy between the comparative and sociological traditions to ensure that comparative educational research is firmly grounded within relevant social contexts.

In addition to the effacement of local *context* through large-scale quantitative research exercises, many comparative researchers are concerned about the disappearance of a sense of history (Jameson 1988; Watson 1999; Novoa and Yariv-Mashal 2003; McLaughlin 2004). This respect for the 'history of the present' (Foucault 1994) is associated with post-modern thinking, which refutes any form of grand meta-narrative to 'explain the present' (Watson 1999, 235) or to 'tutor our judgments' (Stenhouse 1979, 6). McLaughlin (2004) therefore argues that history and comparison should be reconciled, so the researchers can 'trace the conceptualisation of ideas and the formation of knowledge over time and space to produce an individual, historically contingent social, cultural and educational discourse' (Novoa and Yariv-Mashal 2003, 435).

Despite these important observations, two opposing epistemologies, which Epstein (2008, 377) describes as 'the universalism of positivism and the particularism of relativism', have emerged over the past three decades in comparative education research. This dualism epitomises the infamous paradigm wars, where the generalizability of results obtainable from large-scale quantitative data analyses are weighed against the deep understanding that can be developed through fine grained qualitative methods. These concerns are not new, although they have taken on greater urgency with the advent of globalisation, the influence of supra-national organisations like the OECD and World Bank, and the increased use of large-scale quantitative comparisons that seek to establish international benchmarks; see, for example, the

OECD's Programme for International Student Assessment (PISA). Yet, it was apparent even in the 1970s that the use of positivist approaches alone risks the 'misapplication of findings and the (often unrealised and misunderstood) policy-oriented potential' (Grant 1977, 76). This view was later reinforced by Stenhouse (1979, 5), who argued that:

> Comparative education is less concerned with predictions and possibilities than with that which is accepted as actuality occurring in time and space. Its happenings are located within the coordinates of living rather than within the coordinates of theory. It is descriptive rather than experimental. It deals in insight rather than law as a basis for understanding.

Thomas (2010) concurs with this view by stating the practicality of "phronesis" or wisdom derived from personal experience and deep understanding as opposed to using deductive reasoning for the purpose of generalizing findings. He too refutes the representativeness of a unique case to other typical situations (2011b), because even though there are commonalities between multiple spaces, to say that a case acts as an archetype of 'common' contexts is illogical. This is particularly applicable to international comparison in a globalised world where research must engage with and track the mutation of policy and practice across borders and over time.

A strong case for the reconceptualization of the field to better contend with the contemporary challenges presented by technology and globalization was made in a special issue of *Comparative Education* where, for example, King (2000, 268) pointed to the 'interplay between context, policy-making and opportunities for fulfilment,' to argue for a more deep-seated appreciation of the intricacy of education decision-making. Comparative research, King argued, should involve comprehensive analysis of the complete 'ecology' at work within a given context through attention to educational inheritance and provision, dynamic shifts in schooling and the impact of technological and socio-political upheavals. In the same special issue, Broadfoot (2000) proposed that researchers go beyond the superficial description of context, so that the field may revive the analysis of social and cultural influences and improve the *applicability* of research findings. These calls echo throughout the research literature which, on the whole, reflects enduring concern with three central elements of comparative educational research: (i) the need for contextualisation; (ii) the effect of globalisation; and (iii) the potential for conceptual or practical application. In the

following section, we describe these elements to ground our framework for international comparative research in education.

I.   Contextualisation

The narrow interpretation that current educational affairs have come into being with no connection to historical events, political priorities, socio-cultural development and stakeholder influence renders some international comparisons weak, inconclusive and lacking the necessary detail that is required for useful policy reference. If not seen in the light of contextual factors, the whole workings of an education system might be misunderstood, as educational aims can only be realized by improving the whole 'network of influences and micro-politics which governs its realization' (Broadfoot 2002, 6). Hofman, Hofman and Gray (2008) seek to overcome this dilemma in their comparison of key dimensions of schooling in European school systems by putting in place an additional stage called 'framework building,' which involves the recruitment of 'experts' who are well-informed of salient features in their respective countries. Multilevel analyses are used to construct a dynamic 'country-matrix' to inform cross-case (or cross-country) analyses; a measure which significantly improves the depth, validity and outcomes of the research.

Contextualisation can be better achieved by understanding the essential analytical framework within case study, which is referred to as the argument or topic a case is '*of*' (Thomas 2011a, 512). In question, what is one trying to find out about a case? It is crucial to scrutinize in distinctiveness the difference of the *subject* and the *object* to gain a sense of clarity of what is the goal of an investigation, while not losing the connection between those two elements. Thomas further clarifies that the object is the thing to be explained while the analysis of subject could give rise to explanation. To give an example, if an education system is chosen as the subject, then the structures and performance *of* it will be the object to be explained. The typology recommended by Thomas (2011a) sets apart both elements in order to view clearly the 'theoretical or illustrative approaches, methodological decisions, and decisions about process' (518).

Such an approach is best enabled via a mixed method or multidisciplinary methodological approach that draws on various social science disciplines: sociology, politics, economics, geography, cultural studies, anthropology and history (Altbach and Kelly 1986). Given that intensive research can be difficult to conduct on a large-scale, Broadfoot (2000) recommends a range of approaches from 'complex statistical

analyses based on huge quantitative data-bases at one extreme, through to intensive ethnographic studies on the other' (369). Attention to local and/or national context alone however is not enough as international forces bear an increasingly powerful influence upon individual jurisdictions. For this reason, experienced comparativists recommend attention to globalising discourses and trends.

II.   Globalisation

As recommended by Parkyn (1977), the analysis of local context and international relations are equally significant. Most studies prior to the 1970s focused solely on within-system variables or across-system variables without investigating their interaction across time and space. Dale and Robertson (2009) however critique the former approach as 'methodological nationalism', arguing that no nation state is immune to the effects of post-modernity in a technologically rich, globalised world where trends and events in one corner of the world can impact upon another. In all spheres, both corporate and government, practices of policy borrowing and assimilation have occurred both directly and indirectly from Anglophone societies to other parts of the world. Yet, the results are not necessarily advantageous. For example, Nguyen, Elliott, Terlouw and Pilot (2009) found that mounting pressure to modernize and remodel education systems in line with 'international standards' set predominantly by systems in the West has led to the adoption of approaches that have proved unsuitable in the East

Globalisation does not therefore result in homogenization but has distinct differential implications on nation states (Crossley 2002). Migrating policies or trends can be taken up in different ways resulting in mediation, adaptation and even resistance (Vulliamy 2004). This 'dialectic of the global and local' (Arnove and Torres 1999, 1) demands broader multilevel units of analysis that are capable of incorporating global, intra-national and micro-level comparisons (Crossley and Jarvis 2000). For example, to determine the relationship between policy trends and teacher values in professional practice in England and Denmark, McNess (2004) employs an expanded case study approach set in a socio-cultural framework to 'link the macro concerns of international and national policy with a micro analysis of individual teacher experience' (318). Multi-level analysis is conducted using the concept of an 'iterative filter' (McNess 2004) to obtain insights and reflections from a range of key informants at both national and local levels. Information is analysed with an eye to both global and national contexts in order to shed light on classroom practice. The

result is a study that maximises the *applicability* of the research findings; the final element of comparative research to which we will now turn.

III.   Application

International comparison poses an opportunity for mutual policy reference by understanding the different past developments, responses to global forces and effectiveness in resolving educational issues in each jurisdiction. Jurisdictions may have similar or divergent trends and each can provide insights when the research design is both epistemologically and methodologically sound. For example, when looking at *similar* trends relating to academic differentiation, school achievement and school violence in the USA and Korea, Akiba and Seunghee (2007) recommend that policymakers reassess the impact of academic tracking. This they argue results in negative labels on students in lower tracks, leading to student disaffection and an increase in the incidence of violent behaviour. Conversely, Kwon's (2003) analysis of *divergent* trends in preschool education in Korea and England shows how the development of early childhood education in each country has been affected by different historical and philosophical foundations, as well as by significantly different government policies and implementation processes. Macro analysis of the historical and philosophical background to each context, followed by micro-analysis of the perceptions of preschool educators, supplemented by observation of daily practice and a review of the curriculum, served to highlight significant inconsistencies between official policy, the perceptions of preschool educators and pedagogical practice within and between each jurisdiction.

Comparison has also been co-opted to set-up measurable benchmarks for educational institutions worldwide. For example, the *European Report on Quality of School Education* (European Commission 2000) identifies 'the need to set quantifiable targets, indicators and benchmarks as a means of comparing best practice and as instruments for monitoring and reviewing the progress achieved' (6). International education assessments such as PISA and TIMMS are examples of benchmarking where educational jurisdictions strive to ascend the ladder of academic world rankings. Novoa and Yariv-Mashal (2003) argue that this regulatory status to achievement standards is constructed as the chief yardstick for the control of both quality and efficiency. In so doing, the construction of and adherence to comparative benchmarks has become a de-facto element of education policy making.

This growing trend has been met by a flood of criticism with one being that large-scale comparative macro-analysis is methodologically flawed (Boyle 2009). Other than the questionable sampling methods, there is no micro-analysis of contextual details to test or otherwise ground quantitative findings (Karsten, Visscher and De Jong 2001). This is highly problematic for at least two reasons. First, a lack of understanding of context increases the possibility of misinterpreting practices of other countries, and second, the policies observed may be too closely tied to their specific contexts to be of use elsewhere (Grant 2000). For example, Müller and Norrie (2010) maintain that the Spanish education reforms favour a 'social service' oriented model as opposed to the 'managerial' model of professionalism in England; noting the influence of Spain's historical resistance to neo-liberalism as a key driver in the development of their national priorities and the Spanish education system. Market-based policy solutions to deal with educational problems are unlikely to be popular in the Spanish context. Therefore, while comparative methods present great opportunities for informed policy-making, this is only possible when policy makers look beyond results and rankings to the core contextual elements of educational successes and failures (King 2000).

To assist in effective 'conceptual' borrowing, comparative education plays a role in examining educational practices in their root context to determine how feasible it is for foreign ideas from similar systems to be assimilated and the adaptation required for successful translation (Grant 2000). For example, Graham's (2007) analysis of the relationship between curriculum and equity in student achievement points to the influence of modes of political governance. She argues that the active welfare policies, quality universal childcare and education, and strong government regulation of public goods in 'other-regarding' societies, such as Finland, contribute to their consistent achievement of high quality and high equity in the OECD's Programme of International Student Assessment (PISA). High quality and low equity, on the other hand, is more commonly experienced by 'self-regarding' societies adopting neoliberal reforms that promote individualism, competition through market-based reforms, prescriptive curriculum and high-stakes assessment (Luke, Graham, Sanderson, Voncina and Weir 2006). As a result of these different socio-political environments, the adoption of school choice policies has led to markedly different results in each jurisdiction (Graham & Jahnukainen 2011). Finnish parents are not compelled to choose when local schools do not differ significantly in quality and there

is little cultural appetite for the competitive materialism that exists elsewhere. However, without analysis that extends to the geopolitical or macro level, and without recourse to multidisciplinary methods, such details will remain obscured from educational researchers and policy-makers.

(Re)Conceptualising Comparison

As most educational jurisdictions are different in terms of administration, political governance, bureaucratic language, policy, teaching practice, national goals and historical development, comparison cannot be made on an 'apples to apples' basis (Graham and Jahnukainen 2011). Comparative research in education therefore requires the combination of a complex set of methodologies that are capable of sketching both broad and fine detail. While an increasing number of comparative studies have drawn on solid theories to cope with the growing complexity of the globalised world, the central elements informing strong comparative research design have not been made fully explicit in the research literature. The exemplars discussed in the first half of this paper suggest that a multi-level approach with comparable units of analysis is needed to anchor research within distinct international contexts in order to develop nested case studies that are capable of identifying, mapping and understanding the complexities of and influences upon education systems internationally.

In the following section, we draw on the concept of the 'Matryoshka' or Russian 'nesting' doll to outline a nested case-study approach currently supporting an international comparison of special education across four jurisdictions: New South Wales, Scotland, Finland and Malaysia. The rationale of adopting a nested approach is to look at the relevant elements within a case which are useful for comparison to comprehend certain inquiry. The '*nested* elements' (Thomas 2011a, 517) place emphasis on the holism of the wider context by forging the components within a subject. Following Crossley and Vulliamy's (1984) assertion that international comparison should be conducted on a 'case for the case' basis and building on Dale's (2005) more recent concept of pluri-scalar analysis, the framework begins from a macro or 'outside in' perspective to trace each jurisdiction's historical place in the world. As well as situating each system in context, a macro view enables understanding of which national and supra-national trends bear influence upon the structure and shape of the education systems particular to each region. The meso level

builds structural matter into each case-study through the addition of both form and detail. Research on the ground with key stakeholders constitutes the third 'micro' level of analysis by providing both an 'inside out' and 'real time' perspective. Together these three layers of analysis produce comprehensive 'nested' case-studies to enable more robust cross-case analysis and the identification of dominant themes, similarities, differences and patterns.

Comparatively special

Education either as a 'strategic commodity' or as a 'public good' is the basis of two political agendas being played out in various countries; many of which seek to encourage parent choice and institutional competition, site-based autonomy, managerialism, performative steering and prescriptive curricula (Ball 1990). At the same time, however, a competing policy trend in the form of the 'inclusion movement' advocates for the provision of high-quality education for all students through meaningful differentiated curriculum, effective teaching, and necessary support services, regardless of race, socio-economic background, physical and intellectual capability (Ferguson 1995). The methodological framework outlined here has been developed to assist in better understanding how policymakers in Australia, Europe and Asia have reacted to these globalised educational movements; what discourses bear most influence on policy decision-making in this area; and what impact these decisions have on student support system design over time. This multi-level model (see Table 1 below) scaffolds both 'vertical' and 'horizontal' analyses: the 'vertical' examines the whole context in-depth via a multi-level structure with the lower level of analysis nested as a subset within the higher level of analysis. This is followed by a 'horizontal' analysis that seeks similar and distinct trends across the four education jurisdictions.

In this analytical framework, the three stages represent different units of analysis. Each level corresponds to a specific inquiry which is complemented by an empirical method for data collection. The *macro level* (or the outermost 'mother doll') attends to the structure 'from without' through a comprehensive review of the international education research literature. Then, as shown in Phase I of the above table, literature particular to each jurisdiction will be analysed to understand how contextual elements such as the historical, cultural, social and political factors have shaped these four distinct education systems.

Table 1: A conceptual framework to build "nested" case studies for vertical and horizontal comparison across and between international contexts

THE "RUSSIAN DOLL" APPROACH			
CASE 1 *New South Wales*	**CASE 2** *Malaysia*	**CASE 3** *Scotland*	**CASE 4** *Finland*
⬇	⬇	⬇	⬇
PHASE I: "CASE FOR THE CASE" ANALYSIS (Crossley & Vulliamy, 1984)			
Research Questions		**Research Methods**	
Stage (a) Macro-analysis: Structure from without			
What does education mean here and who/what is it for? How has educational provision shifted over time and what has this meant in terms of parallel organisational structures (special/general/inclusive)?		Build "nested" case-studies through comprehensive review of the literature and historical analysis of social, cultural and political forces that have shaped the philosophy and organisation of the education system over time.	
Stage (b) Meso-analysis: Structure from within			
Do changes in policy discourse reveal shifts in procedure and practice; which discourse/s are prevalent at what time; and, in what direction do these appear to be heading? Is there evidence of growing concern over particular student groups? If so, how are these groups defined? Which students are targeted for support, has this changed in recent years and, if so, why?		Development of a "case for the case" policy library and timeline to determine what discursive traces are evident in past policy documents, and how these do/do not reflect the macro forces identified in Phase 1.	
Stage (c) Micro-analysis: Mining the evolution of student support, rationale & practice			
How are these policy-text discourses reflected in the "live" discourses used by policy makers from various departments within the education system and does their prevalence differ? *How do policy makers themselves define student support and target groups? Where is the bulk of student support directed and to whom?*		Analysis of semi-structured interviews with policy makers from each jurisdiction. Juxtaposition of interview discourses with "text" based policy discourses to determine what themes "bleed out" over time and which remain constant.	
PHASE II: CROSS-CASE ANALYSIS			
CASE 1 *New South Wales*	**CASE 2** *Malaysia*	**CASE 3** *Scotland*	**CASE 4** *Finland*
Identification of appropriate "objects of comparison" and points of "convergence" indicating supra-national influence and globalising discourses (Dale, 2005).			

The *meso level* (the dolls within the mother doll) turns to education policies and, in the case of this project, changes in special education enrolment trends will be chronologically mapped against shifts in policy formation and the discourses "fixed" within them. The final *micro level* – the innermost Russian doll – concentrates on interviews with current policymakers from each of the four sites. The information gathered from one level will be used to inform the other, thereby constructing robust case studies that are firmly grounded in their respective contexts. In this study, this reciprocal interaction is further enhanced through the juxtaposition of 'live' policy discourses to those 'fixed-in-text' to determine any shifts in language and focus over time. Finally, given that Dale (2005) recommends the incorporation of a pluri-scalar dimension, as shown in Phase II of the study (see Table 1) the socio-cultural elements within each unit of study will be matched with supra-national conditions to determine the interactional effect of global agendas and national development. This final analytical phase aims to determine if and when global movements have seeped into the workings of an educational system and how these may have affected the educational discourses used by different actors within different systems at different times.

Conclusion

Through comparative methodologies, we can more clearly see how each education system has developed its own distinctive character (Cowen 2000), how local nuances such as language, culture, population, political stance and institutions influence education systems, and how real-life educational decisions are made. Such methods also provide an explanatory lens through which we can understand why certain measures undertaken by systems in other jurisdictions can be difficult to implement in our own, and why the same challenges have a different significance in a different context (King 2000). Comparison can therefore shed light on the relationship between educational systems and the societies in which they have developed. The proposed ecological or 'Russian doll' approach which consists of multi-layer or 'nested' case studies answers the call of comparativists to foreground the context and to include an international perspective in the research design to aid considered and evidence-based education policy-making (Mitter 1997). Its three-tier pluri-scalar structure (Dale 2005) equally attends to 'dialectic of the global and local' (Arnove and Torres 1999, 1), avoiding the methodological extremes that has troubled the field

for so long. In other words, 'the things outside schools' (Sadler 1964, 310) are examined in the same space as the effects of culture, context and new forms of discourse following globalization (Crossley 2000, 2002). Cultural factors that make up the distinctive composite of an educational jurisdiction are explored in detail, opening up opportunities of cross-cultural and interdisciplinary research (Broadfoot 2000). This type of research design will produce rich comparative data, which will deter uncritical borrowing of educational policy and practice (Grant 2000). Policies developed elsewhere can then be more appropriately viewed as contextual blueprints, rather than convenient moulds.

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15 September 2010

Reference: 5201001137(D)[1]

Dr Linda J. Graham
Centre for Research on Social Inclusion
Room 902, Building C3A
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Dear Dr Graham,

<div align="center">

FINAL APPROVAL
</div>

Title of project: 'Discourses, Decisions, Designs: An international comparative analysis of "special" educational policy making'

The above application was reviewed by the Faculty of Arts Human Research Ethics Committee. Final approval of the above application is granted effective 15 September 2010, and you may now proceed with your research. The following personnel are authorised to conduct this research:

Dr Linda J. Graham - Chief Investigator/Supervisor
Miss Pei Wen Chong (Jessica) - Co-Investigator

Please note the following standard requirements of approval:

1. The approval of this project is **conditional** upon your continuing compliance with the *National Statement on Ethical Conduct in Human Research (2007)*.

2. Approval will be for a period of five (5) years subject to the provision of annual reports. **Your first progress report is due on 15 September 2011.**

   If you complete the work earlier than you had planned, you must submit a Final Report as soon as the work is completed. If the project has been discontinued or not commenced for any reason, you are also required to submit a Final Report on the project.

   Progress Reports and Final Reports are available at the following website:

   http://www.research.mq.edu.au/researchers/ethics/human_ethics/forms

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www.mq.edu.au

ABN 90 952 801 237 | CRICOS Provider No 00002J

4. If the project has run for more than five (5) years, you cannot renew approval for the project. You will need to complete and submit a Final Report and submit a new application for the project. (The five year limit on renewal of approvals allows the Committee to fully re-review research in an environment where legislation, guidelines and requirements are continually changing, for example, new child protection and privacy laws).

5. All amendments to the project must be reviewed and approved by the Committee before implementation. Please complete and submit a Request for Amendment Form available at the following website:

http://www.research.mq.edu.au/for/researchers/how_to_obtain_ethics_approval/human_research_ethics/forms

5. Please notify the Committee immediately in the event of any adverse effects on participants or of any unforeseen events that might affect continued ethical acceptability of the project.

6. At all times you are responsible for the ethical conduct of your research in accordance with the guidelines established by the University. This information is available at the following websites:

http://www.research.mq.edu.au/policy

http://www.research.mq.edu.au/for/researchers/how_to_obtain_ethics_approval/human_research_ethics/policy

If you will be applying for or have applied for internal or external funding for the above project, it is your responsibility to provide Macquarie University's Research Grants Assistant with a copy of this letter as soon as possible. Internal and External funding agencies will not be informed that you have final approval for your project and funds will not be released until the Research Grants Management Assistant has received a copy of this letter.

Yours sincerely

Andrew Buck
Professor
Associate Dean Research Faculty of Arts
Chair, Faculty of Arts Human Research Ethics Committee

Copy: Miss Pei Wen Chong (Jessica)

FACULTY OF ARTS HUMAN RESEARCH ETHICS COMMITTEE
MACQUARIE UNIVERSITY

http://www.research.mq.edu.au/researchers/ethics/human_ethics

www.mq.edu.au

ABN 90 952 801 237 | CRICOS Provider No 00002J

310

Research Support Office

MORAY HOUSE SCHOOL OF EDUCATION

The University of Edinburgh

Old Moray House

Jessica Pei Wen Chong

22 The Icon

Southernhay

Basildon

SS14 1FG

3 March 2011

Dear Jessica

Discourses, Decisions, Designs: An international comparative analysis of "special" educational policy making

The School of Education Ethics Sub-Committee has now considered your request for ethical approval for the studies detailed in the above application.

This is to confirm that the Sub-Committee is happy to approve the application and that the research meets the School Ethics Level 1 criterion. This is defined as"'straightforward' non-intervention, observational research (e.g. analysis of archived data, classroom observation, use of standardised questionnaires)".

A standard condition of this ethical approval is that you are required to notify the Committee, of any significant proposed deviation from the original protocol. The Committee also needs to be notified if there are any unexpected results or events once the research is underway that raise questions about the safety of the research.

Yours sincerely

Dr K McCulloch

Convener, School Ethics Sub-Committee

UNIT PERANCANG EKONOMI
Economic Planning Unit
JABATAN PERDANA MENTERI
Prime Minister's Department
BLOK B5 & B6
PUSAT PENTADBIRAN KERAJAAN PERSEKUTUAN
62502 PUTRAJAYA
MALAYSIA

EPU
ECONOMIC PLANNING UNIT
PRIME MINISTER'S DEPARTMENT, MALAYSIA

Telefon : 603-8872 3333

Ruj. Tuan:
Your Ref.:

UPE: 40/200/19/2692

Ruj. Kami:
Our Ref.:

8 September 2010

Tarikh:
Date:

Chong Pei Wen
Unit 27, 36,
Fontenoy Road,
Macquarie Park,
2113 New South Wales.
Email: jessicacpw@hotmail.com

APPLICATION TO CONDUCT RESEARCH IN MALAYSIA

With reference to your application, I am pleased to inform you that your application to conduct research in Malaysia has been *approved* by the **Research Promotion and Co-Ordination Committee, Economic Planning Unit, Prime Minister's Department.** The details of the approval are as follows:

Researcher's name :	CHONG PEI WEN
Passport No. / I. C No:	821209-08-5518
Nationality :	**MALAYSIAN**
Title of Research :	"Discourses, Decisions, Designs An international comparative analysis of "special" educational policy making in New South Wales, Scotland, Finland and Malaysia."

Period of Research Approved: **4 YEARS**

2.   Please collect your Research Pass in person from the Economic Planning Unit, Prime Minister's Department, Parcel B, Level 4 Block B5, Federal Government Administrative Centre, 62502 Putrajaya and bring along two (2) passport size photographs. You are also required to comply with the rules and regulations stipulated from time to time by the agencies with which you have dealings in the conduct of your research.

3.   I would like to draw your attention to the undertaking signed by you that you will submit without cost to the Economic Planning Unit the following documents:

a)   A brief summary of your research findings on completion of your research and before you leave Malaysia; and

b)   Three (3) copies of your final dissertation/publication.

4.   Lastly, please submit a copy of your preliminary and final report directly to the State Government where you carried out your research. Thank you.

Yours sincerely,

(MUNIRAH ABD. MANAN)
For Director General,
Economic Planning Unit.
E-mail: munirah@epu.gov.my
Tel: 88725281
Fax: 88883961

ATTENTION

This letter is only to inform you the status of your application and **cannot be used as a research pass**.

Cc:

Pengarah
Bahagian Perancangan Penyelidikan & Dasar Pendidikan
Kementerian Pelajaran Malaysia
Aras 1-4, Blok E8, Kompleks Kerajaan Parcel E
Pusat Pentadbiran Kerajaan Persekutuan
62604 Putrajaya

Department of Education
Faculty of Human Sciences
MACQUARIE UNIVERSITY   NSW   2109

Phone: +61 (0)2 9850 9874
Fax: +61 (0)2 9850 8674
Email: linda.graham@mq.edu.au

Chief Investigator's / Supervisor's Name: Linda J. Graham

Chief Investigator's / Supervisor's Title: Dr

Information and Consent Form

Name of Project: <u>Discourses, Decisions, Designs: An international comparative analysis of
"special" educational policy making</u>

You are invited to participate in a study that aims to examine similarities and differences in the aim and structure of student support services in different regions of the world.

Understanding the rationale behind shifts in policy requires the input of those responsible for its development. Education departments are large and complex organisations with many directorates and administrative regions, each charged with specific responsibilities to be executed across a diverse range of contexts.

In seeking to understand how educational support is conceived in different educational jurisdictions around the world, it is important to gain the perspectives of policy/decision makers with responsibilities that may have some bearing on the research problem.

The study is being conducted by Jessica Pei Wen Chong from the Department of Education, Macquarie University contactable via mobile +61(0)425015518 and email jessicacpw@hotmail.com. It is being conducted to meet the requirements of doctoral degree in education under the supervision of Dr Linda J. Graham from the Centre for Research on Social Inclusion and the Department of Education, Macquarie University contactable via +61(0)2 98509874 and linda.graham@mq.edu.au

If you decide to participate, you will be asked to participate in an open-ended interview of approximately 60-90 minutes duration in a setting and at a time that is convenient to you.

Questions will seek to explore your perceptions of:

· the purpose and aims of education in the 21st century;
· effect of globalization on education policy making such as policy borrowing;
· policy initiatives to increase equity;
· differences between special education, integration, inclusion and inclusive education;

Corresponding author: jessicacpw@hotmail.com

- aims and structure of education support services over time;
- education provision for disadvantaged children and migrant students from non-English background;
- standards/ market agenda and inclusion agenda
- effect of international comparisons, such as the OECD's Program for International Student Assessment on local policy-making processes
- why Finland is a consistent top performer in PISA
- external influences (social, industrial, economic, political, demographic) that may complicate the policy making process;
- the future of inclusive education in contemporary contexts

The interview will be audio-taped for transcription purposes, after which the audio files will be destroyed. All transcripts will be de-identified, pseudonyms used to anonymise the data, and codes assigned to protect geographic identity of the directorate or region.

Any information or personal details gathered in the course of the study are confidential. No individual will be identified in any publication or presentation of the findings. The data will be stored in a locked filing cabinet in the researcher's private office. A professional transcriber will convert the audio files to text. A summary of the results of the data can be made available to you on request by mail or email to Jessica Pei Wen Chong via the contact details above.

Participation in this study is entirely voluntary: you are not obliged to participate and if you decide to participate, you are free to withdraw at any time without having to give a reason and without consequence.

I,   *(participant's name)*   have read *(or, where appropriate, have had read to me)* and understand the information above and any questions I have asked have been answered to my satisfaction. I agree to participate in this research, knowing that I can withdraw from further participation in the research at any time without consequence. I have been given a copy of this form to keep.

Participant's Name: _____
  (Block letters)

Participant's Signature: _____Date:_____

Investigator's Name:_____
  (Block letters)

Investigator's Signature:_____ ___Date:_____

The ethical aspects of this study have been approved by the Macquarie University Human Research Ethics Committee. If you have any complaints or reservations about any ethical aspect of your participation in this research, you may contact the Committee through the Director, Research Ethics (telephone (02) 9850 7854; email ethics@mq.edu.au). Any complaint you make will be treated in confidence and investigated, and you will be informed of the outcome.

(INVESTIGATOR'S [OR PARTICIPANT'S] COPY)