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Support and Resistance
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Abstract

This dissertation consists of empirical studies reported in five scientific articles together with a theoretical and methodological framework.

The aim of the work was to analyse interactions between the comprehensive/compulsory school organisation and pupils involved in special educational activities. Specific questions concerned

• the pupils’ concept of self
• the pupils’ perception of school and educational environments
• relationships between psychosocial environment, aspects of educational organisation and local social context
• strategies at school for handling variations among pupils and pupil strategies for handling demands school places upon them
• processes in the interaction between school and children who are considered different and in need of support

Data were collected with surveys, questionnaires, observations and interviews. They were examined with regression analysis, text analysis and confirmatory factor analysis, structural equation modelling, and multiple case study.

The main results are:

• Pupils who receive special support at school are not a homogeneous group concerning their global self-concept. Their self-concept in relation to school subjects like reading and spelling is lower than in pupils without such support. Pupils with support compensate this with a more positive perception of relations with friends and classmates at school.
• Pupils’ perceptions of school and of class climate vary greatly from setting to setting. Levels of satisfaction and cohesion, and perceptions of friction within the group, vary between classes.
• Class climate and its connections with social context and organisational factors were investigated with a two-level structural model. In low-status areas, the class climate shows more friction. Differentiated settings are also connected with conflict and competition. The presence of pupils with disability correlates with cohesion in the group.
• Compartmentalisation of goals, values and settings is a strategy to handle heterogeneity in the group and goal conflicts in the school organisation. The result is an ambivalent policy expressing both support for and resistance to the pupils who are
perceived as not possible to “standardise”. The children show several strategies for dealing with their school situation or reacting to it: self-advocacy, help-taking, compensation, and mortification. Some children also express an ambivalence toward their educational situation and the support given.

- Two models of the interaction between school organisation and pupils with different abilities are presented: the first describes facilitators leading to more participation; the second hindrances leading to more differentiation.

**Key words:** children, comprehensive school, disability, psychosocial environment, self-concept, special education.
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To Axel and Lorenzo
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List of original papers

The thesis is based on the following articles:


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1. Introduction

1.1. Background to the investigation

This investigation was carried out within the framework of a research project called Pupils with Special Prerequisites and the Possibilities for Integrated and Segregated School Systems to Satisfy their Needs at the Stockholm Institute of Education, with the supervision of Siv Fischbein.

The project ran between 1996 and 2001 and was supported by the Swedish Council for Social Science Research (project 95 – 0917:1C).

The project is based on a theoretical framework that assumes interaction between individual and environmental dimensions in education (Fischbein et al. 1997). This framework guided the planning, method development and the interpretation of the results.

The project involved a network of 25 special educators who completed their training at the Stockholm Institute of Education. They were working in various municipalities mainly in Stockholm County where they had different tasks: coordination, supervision, inquiry, teaching in compulsory school and in special units.

The general purpose of the project was to study

- children who receive special support, their experience at home and school,
- special educational resources and their organisation in regular and differentiated environments;
- special educational endeavours from individual, group and social perspectives.

The project consisted mainly of three studies. The first considered the parents’ perspective (Roll Pettersson, 2001) and the second the professional development of special educators in different organisations (Malmgren-Hansen, 2002). The present study considers the pupils’ perspective.

1.2. Disposition

This dissertation consists of

- four articles published or accepted for publication in educational journals,
- a paper published in a conference report;
- a theoretical background providing a framework of these studies.
Section 1 summarises the five articles. Section 2 expresses the aim of this work. Section 3 introduces some theoretical standpoints with examples and views from western history connected to the themes of otherness, difference and rights. Some key concepts are also presented and defined.

Section 4 presents and discusses the methods used in this investigation. In section 5 the results are presented in relation to aims. The results are discussed in relation to each other and placed in a broader perspective in section 6.

Section 7 contains references and Section 8 the complete articles.

1.2. Summary of the articles

1.2.1. Study 1

Self-concept in children receiving special support at school

http://www.tandf.co.uk

The aim of this study was to investigate the variations of self-concept in pupils in basic compulsory school and special units and to examine self-concept at school in relation to different models of support (more integrated or less).

Self-concept at school is considered as a multidimensional construct with the dimensions academic self-concept, social self-concept and personal self-concept. A compensatory model of self-concept is also suggested.

The study involved 183 pupils aged 9 to 13 years, attending comprehensive school or special-programme units in Sweden. Seventy-seven were receiving support from special educators.

Self-concept at school was assessed with the pupil questionnaire “This is me”, with 30 items and a four-level rating scale.

Children with support at school do not show lower self-concept ratings than the pupils without support.

Self-concept was compared in comprehensive-school children with and without support. The children without support had somewhat higher average scores, but the difference was not statistically significant.

There were however significant differences in the specific components academic self-concept and social self-concept. The children with support gave more negative answers to questions about school subjects, and more positive to questions about peer relations.
Pupils with support try to compensate for the threat to their self-esteem by giving more importance to peer relations, or by having a more positive image of their peer relations at school. Pupils with support at school are not a homogeneous group, but they seem to struggle actively to maintain a good self-concept.

Peers do not necessarily become a comparison group. Peers can instead be experienced as a source of support and consolation. Recommendations for education are to foster good relations in the group, to enhance peer interactions and communication, to look upon the group and each child in it as resources in education.

1.2.2. Study 2


The aim of this study of children’s experience was to investigate what children thought about school, what their image of school was. Other specific questions were related to the problems, strategies and evaluations presented by the children.

One hundred and eighty-five children living in 10 Swedish municipalities and attending one of 16 schools wrote a text about their school situation. Ninety of these children were receiving special support at school because of learning disabilities or other difficulties.

The texts were analysed and interpreted using methods from narrative inquiry and sociolinguistics (structural analysis, evaluation model, lexical signalling).

To the children, school meant mainly interacting with other persons, thus being foremost a social environment. The dominant events were their actions and activities. These consist of learning, play, social relations and bodily experience, and are characterised by feelings of pleasure and uneasiness.

Time turned out to be an important dimension: school itself appeared as a timetable, structuring and regulating time.

Children often evaluated their experience of school, both positively and negatively. Diverse problems and complications were present in the texts. Problems emerged from lack of stimulation and lack of control, leading to abusive behaviour and lack of safety. Children wanted other people to respect the rules. The children with support at school were not a
homogeneous group: several mentioned situations concerning personal rights, regulations and justice, themes that were not common in the texts of the other children.

The scarcity of neutral statements on curriculum, goals and achievement means that these issues were presented and experienced as very personal: school difficulties were related to personal conditions or experience of failure.

Children had the star role at school, but teachers were also very important. They could inspire, make children interested in school subjects and give support when things were difficult.

A good climate meant that all children could co-operate, nobody fought, everybody had a friend to be with, and the children invited their peers to common activities. Ability to induce democratic group processes and a readiness to take ethical responsibility seemed to be important components of the teacher profession, according to the children in this study. They enjoyed having influence and making choices, but they did not like a laissez faire environment where they felt insecure.

1.2.3. Study 3


The paper on educational settings analyses the organisational contradictions between the intentions to integrate pupils with disabilities and the dramatic increase in pupils enrolled in special units.

School has to work towards different goals and there are conflicts between goals (socialisation, selection) and also between systems of values, rights and interest.

The study investigated the boundaries between the “normal” and the “different” at school by analysing differences between regular and differentiated school settings.

This was a case study of functions and conditions of support in differentiated educational settings, based on observations of the activities in three groups and on interviews with special educators working in these.

Two groups (8 to 10 pupils) had pupils aged between 7 and 12 and the third contained 13- to 15-year-olds.
One function of these groups is to cater for pupils who cannot match the increased “pace of life” in regular school or meet the high expectations of social or intellectual performance.

The groups were not homogeneous. Lower achievement was an experience of many children, but not a common criterion.

Some pupils in each group faced problematic family situations, others had problems with relationships, communication and/or attention and had poor self-confidence. Teachers and peers may regard pupils who were transferred to differentiated settings as different (i.e. weak, odd, slow). These children often needed instructional support, but also (or only) protection from their peers.

The boundaries between the normal and the different are not absolute, instead they are negotiable. Psychomedical diagnoses are not always a prerequisite for enrolment in the special units; they are not always accurate and they are not a sufficient qualification for special support.

Some parents wanted to avoid the stigma of registering the child in the special units and their children risked losing some of the resources to which they should be entitled.

Differences between regular and segregated settings were visible in relations with parents, pace of work, children’s responsibilities and teachers’ strategies and subject matter. Teachers in segregated and integrated settings did not always collaborate, despite requests from head teachers. The relationships between children were of different kinds: oppression and bullying, but also interest, collaboration, support and even “celebration”.

The study suggests that a binary concept of normality and deviation operates at school: a child is either like everybody else, or is deviant. School as a normalising organisation reacts to differences with denial, resistance, rejection and segregation.

The contradiction between goals and values in school was solved with compartmentalisation, the segregated settings running the mission of democratic participation and socialisation and the regular settings concentrating on the goals of selection and achievement. The modalities of classifying and distributing children in different groups according to their performance, however, basically contradicted the mission of socialisation, because all children had more limited opportunity to meet others with diverse experience and characteristics.

The specialisation of teachers and the supposed homogeneity within groups are expressions of conventional and apparently rational
management goals, which can be referred to the system’s goal of efficiency.

This goal of “rational” and “efficient” management of school seems in some cases to override the other goals. An “efficient” use of special education resources can enforce a re-centralisation of resources and expertise to a particular school district and increasing specialisation of the services. These processes can counteract the possibility of choosing a general or less restrictive school environment and, for the school, of developing local preparedness and experience of special education.

1.2.4. Study 4


The purpose was to develop an instrument for assessing the social environment of compulsory classes in Sweden. Another purpose was also to describe the classroom environment and to investigate its relationship with organisational aspects.

Seven hundred and five pupils (680 in comprehensive schools, 25 in special units) in 39 classes from grade 3 to grade 6 answered the questionnaire My Class (MC). Eighty of these pupils were receiving some kind of special educational support. MC consists of 30 items with Yes/No answers covering the dimensions Satisfaction, Friction, Cohesiveness, Competitiveness, Personalisation and Differentiation. The questionnaire was developed with other instruments as models.

Measures on the six dimensions were used to calculate class profiles.

MC differentiated the classes on five of the six dimensions. The internal consistency of the six dimensions was satisfactory for four dimensions. It seems necessary to modify the instrument by omitting the Differentiation dimension and refining the Personalisation dimension, concentrating only on the teachers’ relation orientation and not on their task orientation.

A factor analysis of the measures on the six dimensions showed a factor, Climate, positively correlating with Satisfaction, Personalisation and Cohesiveness and negatively with Friction and Competitiveness. The Climate of the class in this study ranged between 3.5 and 29.6. A comparison of average scores on the five dimensions in different types of
classes (regular classes, special units, cooperation class) showed higher cohesiveness in special units.

The study highlights the two-dimensional (task/relations) model of teachers’ leadership. The higher cohesiveness in special units was interpreted as an effect of the lower number of pupils in these classes.

The consequences of the variations among the classes are stressed: the quality and quantity of supporting relationships with peers and teachers varied greatly for pupils in different classes, even though the pupils had the same curriculum.

A learning environment where there are conflict, competitiveness, oppression and lack of cohesion can constitute an obstacle to the optimal development of pupils’ cognitive potential. Hence the equivalence of school environments can be questioned.

The study argues that the treatment of children needing special support is an important factor in class climate: adaptation to individual needs is associated with a positive classroom climate and achievement advantages. The treatment of children with special needs in the group and at school can convey societal messages about learning and achievement, and also about values and attitudes. Processes of classification, exclusion and selection may be perceived through the treatment at school of pupils with special needs.

1.2.5. Study 5

A two-level analysis of classroom climate in relation to social context, group composition, and organization of special support.

Accepted for publication in *Learning Environments Research*, vol. 5, 3 (2002).

The purpose was to describe the psychosocial learning environment in special and regular education groups, where there were children with support, and to relate the climate to the composition of the group and the aspects in the surrounding social context.

Specific questions related to 1) the variations within and between classes in children’s perception of classroom climate; 2) the perception of classroom climate and the presence of children receiving special support; 3) classroom climate in relation to the organisation of special support (more or less segregating); 4) classroom climate and the social context of the school.
The sample consisted of 679 pupils in the third through sixth grades. Eighty pupils were receiving special support. The pupils attended 39 classes in 16 schools in nine municipalities, mostly in Stockholm County. Special educators worked in these schools or municipalities: eight were classroom teachers, eight supervised and supported several classes in the same school and one was a supervisor at municipality level.

Classroom climate was studied with the My Class (MC) questionnaire described above.

The abilities of children with special support were rated with SFO, a Swedish version of the Abilities Index.

The organisation of special education was measured with a questionnaire on the amount of scheduled time that each pupil with support spent in segregated settings (special education units, small groups, individual instruction).

A measure of cultural heterogeneity was obtained from teachers’ answers regarding class composition. A class with more than two pupils with non-Swedish language background was considered heterogeneous.

Socioeconomic and sociocultural aspects were described using indicators from population statistics for each school’s recruitment area: unemployment rates, income per inhabitant, percentage of population with no more than pre-secondary instruction, percentage of eligible voters who voted in the local elections.

The data was analysed with multilevel factor analysis (MFA), a method used to analyse hierarchical data from individuals belonging to different groups. The model can simultaneously analyse differences between groups and differences between individuals in the groups. The relationships between variables were divided into two parts: the measurement model referring to the relationships between the latent variables and their indicators, and the structural model, referring to the relationships between the latent constructs. The latent constructs were estimated with Confirmatory Factor Analysis (CFA). These estimates were used to calculate the coefficients in the structural model.

At individual level (within class) a model with 5 factors showed an acceptable fit to the collected data, but fit was further improved with an additional factor. These factors were satisfaction, friction, competition, personalisation, cohesion and work support.

At class level (between classes) the model was designed with three factors. One was a factor of general satisfaction and well being, having to do with the behaviour of teachers and with the relations between teachers and pupils. A second factor described the degree of individualism,
competition and frictions or conflicts in the group. Finally, a third factor had to do with the level of friendliness and cohesiveness among the children.

The CFA of the social context variables gave one factor, which correlated to low percentage of unemployment, high median income, low percentage of adults with less than secondary education, and high voter turnout.

The relationships between class climate, class composition and social context were investigated combining the previous models and adding the variables for class composition. The model showed acceptable fit.

Some interesting results are: 1) in schools situated in areas with high incomes, low unemployment, fewer people with shorter education and high voter turnout, the pupils perceive more cohesiveness, less friction and more satisfaction; 2) the presence of one or more pupils with assessed disabilities and the degree of disability was related to less friction/competitiveness and greater cohesiveness; 3) the occurrence of friction/competitiveness was related to the occurrence of more segregated learning settings; 4) segregated learning environments and higher estimation of disability were more frequent in socially disadvantaged neighbourhoods.

The article discusses the implications of these results for school policies, classroom practice, teacher training and research and supervision of school effectiveness.
2. Aim
The aim of this thesis was to analyse, from the pupils’ perspective, the nature of the encounter between school organisation and pupils regarded as needing special support.

Answers to the following questions should contribute to fulfilling this aim:

1. How do children receiving support at school experience themselves and their school?

2. How do children experience the psychosocial environment in their classroom? What relationships are there between class climate, organisational factors and social context?

3. What strategies does a school use to handle variations among pupils? What strategies do children use to cope with the demands of school?

4. What happens in the encounter between school and children who are considered different and in need of support?
3. A theoretical framework

The present section is fourfold. The first part discusses knowledge developed in special education and argues for a multidisciplinary and multiparadigmatic view. The second part considers some basic epistemological contradictions and outlines possible ways to replace them with the concepts of continuity and interaction. The third part focuses on differences between human beings, through a review of the relevant history of ideas and social history. The last part considers other specific theories and concepts to be applied later in this dissertation concerning interactions in educational environments, e.g. self-concept, psychosocial climate, and organisation of educational systems.

3.1. Knowledge in special education

Knowledge relevant in discussions of special education can originate from various disciplines and may stem from theories developed in different fields such as psychology, social psychology, system theory, social anthropology, sociolinguistics and communication theory. Research in special education can use various methods to study various phenomena, or to study the same phenomenon from different points of view.

Thomas Skrtic (1995) structures special education knowledge with the dimensions subjective/objective and macro/micro. His four-field model represents different paradigms where it is possible to place approaches in special education research on the level of phenomenon (micro/macro) and of method (subjective/objective) (fig.1).

Functionalist studies with a focus on the individual and an objective approach dominated earlier, but the approaches have expanded and developed with analyses of social processes, organisations and groups, and with the introduction of other methods. It is thus possible to cast light on i.e. subjective perspectives or analyses of social organisations and structures.

In Skrtic’s model the differences between the approaches are not only methodological: qualitative/quantitative. The various paradigms generate different kinds of knowledge, needed when we have to take educational decisions. This allows optional choices on the basis of pragmatic questions.
Skrtic describes a standpoint or a discourse as ‘foundational’ when it maintains that its view of what are relevant knowledge, methods and objects is exhaustive and hence better than other views:

Although subjectivism means that there is nothing inherently true about special education’s functionalist knowledge tradition, antifoundationalism means that there is nothing inherently false about it either. (Skrtic, 1995, p. 87.)

In critical pragmatism, different approaches can be useful for studying different issues; but also one’s own research can be placed in a larger context, where its contribution may illustrate some aspect of a complex phenomenon.

A consequence of critical pragmatism is also that the development of knowledge is related to ethical issues, since the consequence of research and new knowledge for practice, are considered important.

Gunnar Kylén (1979), a Swedish scholar in disability research and special education, developed a model, which has been applied in case studies and also in structuring the educational research field (i.e. Allodi, 1992). Kylén’s holistic structure assumes the dimensions information/substance and person/environment.

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**Figure 1. Paradigmatic status of knowledge within special education (adapted from Skrtic, 1995, p. 107).**

<table>
<thead>
<tr>
<th>Subjective</th>
<th>Objective</th>
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<tbody>
<tr>
<td>Radical Humanist (Macro-Subjective)</td>
<td>Radical Structuralist (Macro-Objective)</td>
</tr>
<tr>
<td>Interpretivist (Micro-Subjective)</td>
<td>Functionalist (Micro-Objective)</td>
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<th>Conflict/Macroscopic</th>
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<th>Order/Microscopic</th>
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There is a correspondence between Skrtic’s and Kylén’s models: the dimension subjective/objective expresses one aspect of the relation between information and substance, while the dimension micro/macro can be another expression of the relationship between the individual and society.

Kylén (1992) also describes the interactions between the individual and the environment with a holistic model embracing the individual, the environment and their interaction. The individual is considered as both active and passive in relation to the environment. The holistic model can describe an educational situation, but it is also important to consider the dynamics of the interaction situation. A dynamic description of the interaction can complete the holistic structure (Kylén, op. cit.).

Siv Fischbein, Professor of Special Education at Stockholm Institute of Education, has studied the interaction between individual characteristics and environmental influences. She has developed a model of the interactions between the individual dimension and the environmental dimension in educational settings, described at several levels. This model considers the relation between person and society, and the results of interactions between them.

In an educational or special educational situation, it is important to understand the relationship between individual characteristics, deliberate educative influences and educational results. Environmental factors that can influence the results are described on the basis of the dimensions permissiveness /restrictiveness and stimulation /not stimulation. These factors may work at micro-level, but also at macro-level.

Interactions in an educational situation thus occur at various levels, as illustrated in figure 3:
• within the individual
• between individuals
• between individual and group
• between individual and different environments
• between environmental factors
• between individual and the educational situation (Björklid & Fischbein, 1996).

The result of the interaction can imply a new situation or condition, for both the parties to the interaction or for only one of them.

Fischbein’s model of interaction in educational settings has constituted the theoretical framework in studies of special educational situations and organisations. The model visualises different levels, with a focus on the educational setting, and it can also be used in analysis of changes. The presence of different levels (micro-macro) implies the use of different methods.

The environmental factors that positively influence development are stimulation and a combination of permissiveness and restrictiveness. A stimulating learning environment produces optimal development of inner potentials, while a non-stimulating environment obstructs this development. A permissive environment conduces to a result that is more influenced by individual prerequisites and potential. A restrictive environment decreases variation depending on individual prerequisites.

Assuming the interaction between individual and environment as a two-way relation implies that changes both in the environment and in the individual must be considered.

A stimulating interaction with the environment contributes to the development of various abilities. If the environment is not stimulating, i.e. when there are not positive expectations, the individual will not fully develop his/her potentials. The environment may react to demands of adaptation by rejecting an individual to another environment and avoiding a change.
Fischbein’s interaction model is compatible with theories that avoid reductionistic explications and instead consider and assume interaction between factors.

Several special educational and disability researchers have noted the risk of reductionistic standpoints.

Skidmore (1996) describes three models: psycho-medical, organisational and sociological, and analyses their shortcomings: each is reductionistic when it describes causal relationships that exclude the importance of other factors.

Söder (1999) in an evaluation of special educational research in Norway, also highlights the risk of reductionism, using the concepts *individual* and *social essentialism*. Instead, he supports research with a *relational approach*, which can consider, analyse and explain phenomena from new points of view.

In Swedish special education research, too, different perspectives appear and co-exist. (Emanuelson, Persson & Rosenqvist, 2001). Nevertheless, there are several indications of common problems, and also paradoxes. I will in the following underline some risks of reductionism in special educational research.

The basic origin of these conflicts and dilemmas in special educational situations is the relationship between the individual and society. I do not mean the relationship between the abstract category ‘individual’ and the equally abstract category ‘society’, but that between each concrete, unique individual and the real society, its real organisations, practices and decisions. This relationship can produce conflicts and dilemmas that are likely to appear in special education.

A modern society is organised on the basis of general and common principles and often presupposes in its planning an ‘averageness’ of values, needs, results and experience. Such modern societal organisations have difficulties in considering and taking care of non-average experience. It is comprehensible that these difficulties generate contradictions that become visible in special educational practice and research.

Andrea Canevaro, professor of Special Education at the Department of Sciences of Education in Bologna, has contributed both by developing theoretical understanding and by integrating practice with the increased participation of disabled persons in school and society. Canevaro’s humanistic standpoint in special education is that knowledge in special education develops from a broad analysis of society (sociological, historical, philosophical, ethical, political) together with an emphasis on each unique person, his/her abilities and experience in a concrete educational situation (Canevaro et al., 1996). This broad approach has been defined in an OECD report (1994) as an anthropological model.

The need to make use of different theories and approaches can also be relevant for the discipline of educational research, not only for special education. Why then is it so typical for special education research to confront dilemmas and dialectics?

Special education research and practice cannot disregard the fact that educational settings centre on unique, real children. A child also has a body, and it becomes very clear and necessary to pay attention to this, especially when the body has impairments affecting the child’s ability to interact with the learning environment. On the other hand it is difficult in Swedish pedagogical discourse to focus on biological aspects such as growth and sex, functions and abilities.
There are apparently conflicts in educational research about how it is appropriate to relate to these biological and physiological aspects and on their meaning.

In special education it is often not possible to disregard knowledge arising from the natural sciences. This is because knowledge of the possible causes and implications of impairment may be useful when understanding needs and planning interventions. My impression is that in general education research is often possible to avoid considering these aspects.

One implication of these circumstances is the impossibility or undesirability in special education of developing an ideal and general pedagogy, which treats or is adapted to an ideal pupil (i.e. all pupils and no one of them). Special education is forced both in practice and in theory to meet the unique, particular pupil, in whom there may be aspects, including bodily and functional, which are incongruent with those of the general and idealised pupil. The conflict in and around special education may originate in the difficulties of reconciling contrasting imperatives and requests, arising between the particular, unique individuals, with their own needs, wishes, thoughts and feelings, and society with its normalising institutions.

These circumstances and the difficulties in balancing between individual and society, between particular and general interests, expose special educational practice and research to the risk of ending up in an individual reductionistic model or in a social reductionistic model.

The risk of individual reductionism is that it may consider the disability as depending on the individual and consequently direct efforts only towards individual treatment and compensation. Individual reductionism may also lead to materialism, if it is assumed that a physiological condition alone can account for the development and consequently determine the educational setting for a child. The existence of special units (i.e. särskola in Swedish) and the regular placement of children there on the basis of a condition (i.e. Down’s syndrome or mental retardation) may indicate that biological materialism dominates the view of what children can and cannot learn.

Social reductionism may be seen as a reaction against individual reductionism. This standpoint considers the disability as arising in the environment and in society. The risk with this position is that specific personal experience of being disabled can be ignored, not recognised and hence not accepted. Wendell (1996) writes about this on the basis of her own experience of disability. The denial, the lack of recognition of her
disability and of her experience is a form of oppression, and can affect self-esteem. The recognition that a person has an impairment is also a condition for accepting him/her. The tendency to deny can emerge in relationships with other people, but also at a more abstract level, i.e. in social reductionism.

Social reductionism may end up in an idealistic or intellectualistic position, which ignores or denies the significance of biological factors for the development of abilities and behaviour. Nordberg (1997) showed differences in motor and language development between boys and girls exposed to the same family risk factors. Nordberg concluded that boys were more vulnerable to risk factors in the proximal environment. These circumstances cannot be explained or even considered from a social reductionistic position, where biological aspects related to sex do not exist.

The necessity to consider and not deny the body and its functions and conditions can be related to Wendell’s analyses (op. cit). She analyses forms of resistance appearing in American society to those who are not physically capable, or healthy. She interprets this resistance as coming from the need to defend the self against a feeling of vulnerability and fragility, and against a fear of death. The aversion to the imperfect body that Wendell experienced arises because the disabled or chronically sick person forces the healthy persons to consider that they also has a body, which they cannot fully control, even if they want to and try. It is possible to suppose that the denying of biological aspects in social reductionism may also pick nourishment from such need to control the fear of biological death, not only socially constructed death.

The emphasis on the role of environment and society in the creation of disability is important in self-advocacy, where persons with disabilities work for their rights and refuse to take a passive role in society (the social model of disability). The emphasis on disability as a social product can therefore be necessary to improve the quality of practice. The social model of disability forces changes in points of view, and their representation, that can stimulate changes in practice.

Neither individual reductionism nor social reductionism consider how the disabilities or the difficulties are results of an interaction between individual factors (psychological, biological, social) and factors in the environment (social and physical) (Lange & Fischbein, 1996; Heimdahl Mattson, 1998; Lange, 2000).

The multidisciplinary and multiparadigmatic view of special education can be a tool for developing knowledge relevant to the handling of problematic or complex situations. A broad approach showing different
points of view has better chances to avoid one-sided and reductionistic explanations that can inspire bad practice and/or limit understanding of the phenomenon studied. Also for this reason, the principle of ethical responsibility for the practical application of special educational research makes demands to avoid reductionistic frameworks.

3.2. Overcoming conflicts in epistemology

3.2.1. Knowledge and experience
In the previous section I presented standpoints that are important for an understanding of the field of special education. The dialectic conflicts outlined are those between individual and society, between particular and general, and between theory and practice.

The relationship between theory and practice sometimes involves a conflict, or a distance, but there may be also declared intentions and efforts to bring theory and practice together.

Dewey (1916) analyses the epistemological traditions in western societies and finds a fundamental conflict and separation between theory and practice. This is manifested, according to Dewey, when we consider our images of knowledge. There are two kinds of knowledge: the first is considered as higher and rational; the other is lower, empirical and only utilitarian. There is also a conflict between the particular and the universal: experience is considered as a collection of single details, while reason deals with general principles and laws. Knowledge may be considered as something that the individual creates when learning, or as the sum of all that is known, something a person stores from outside. Other conflicts described by Dewey are those between mind and feeling and between mind and body.

All these conflicts culminate, Dewey says, in the one between knowing and doing, between theory and practice, between reasoning as an end and the body and its organs as a means. This hierarchic and dualistic view separates and divides the human being inside and separates human beings from each other, causing much educational evil. Dewey indicates powerful insights that show that these standpoints have to be abandoned.

Such insights come from the image of the human being described by physiology, from evolutionism and from the experimental method.

The study of the human being shows that the separation between body and mind is an intellectual construct, a representation without correspondence in human nature, which is characterised by the complex inter-
action of different functions. These insights will contribute to abolishing
the dualistic view of the human being.

Evolutionism shows that the human being belongs to the world and
nature, is not separated from other beings, and has not the right to rule
over them and the world. These considerations will contribute to elimi-
nating the separation between the human being, the world and the envi-
ronment, and also to interest in the ties, interactions and relationships that
represent our common history and development.

The experimental method requires a constant exchange between theory
and practice. It allows us to test the efficacy of theories in solving prob-
lems, and also contributes to the development of a not dualistic know-
ledge.

Dewey believed that dualism reflects and expresses social separation
and the boundary between those working with practical things and those
working with ideas. At the same time it is an attempt to maintain this
separation. Dualism involves *hierarchic order*. Since a democratic society
means free interactions and social continuity, its foundation and product
has to be democratic knowledge. This implies communication of expe-
rience and knowledge. Here appears the necessity of another view of the
human being, of its relationship to the world, and of knowledge: a demo-
ocratic society has to be based on a different epistemology from that of an
authoritarian society.

A different definition of knowledge and a non-hierarchical relation
between theory and practice are *conditions* for a democratic society.

I will refer now to insights and theories, developed outside pedagogy,
which support the idea of continuity expressed by Dewey and question
the dualistic representation of man, the world and knowledge.

Antonio Damasio, a neurophysiologist, has developed theories based on
research on feelings, thinking, consciousness and behaviour that support
the suppositions of Dewey about the interaction of body and mind
(Damasio, 1994). These investigations uncover interrelations between
what we consider bodily functions and thinking functions in directions
that seriously question our representations of our mind and ourselves.
Damasio’s theories imply that the excellence of rational thinking and its
hierarchically superior position among other thinking processes and
functions can be considered as a metaphysical representation and a pre-
judice or an illusion.

The ability to interact successfully with the environment depends on
the joint action of bodily and thinking functions, taking account of both
internal and external aspects. The internal functions are both *rational* and *emotional*.

Damasio shows that pure rationality is not an ideal condition to seek: people who have lost the ability to take account of their own and others’ feelings when taking decisions— but who are still fully capable of logical and abstract thinking – show a serious negative change in personality. A consequence is that intellectual, logical rationality is not the perfect and ideal condition of thought, superior and self-sufficient. On the contrary, rational thinking alone is *not enough* to support adequate and appropriate daily decisions.

Damasio considers that each appropriate decision we take requires an interaction of different functions: feelings and emotions about what is wrong and right play an important role. Without the support and the guide of our feelings and emotions, we cannot take just, correct decisions.

These results and the related theory support the idea of a non-dualistic, non-hierarchic view of the human mind and human behaviour. They show relationships between thinking, emotions, conduct and ethics.

The overcoming of the dualism between thinking and doing implies a radical rejection of the conception of the human being as consisting of a *res extensa* (body) and a *res cogitans* (mind) introduced by Descartes. This rejection has far-reaching consequences for our representation of the human condition and nature, for Cartesian dualism is fundamental and deep-rooted in Western culture and we have no appropriate concepts to express the idea of continuity and of the whole. The terms we use often have negative meanings: i.e. the adjectives ‘ambiguous’ or ‘indefinite’. Dualism began early in the history of Western philosophy and it is so basic that it has affected even our language (Galimberti, 1987).

Damasio asserts that his theories correspond to the intuitions and theories of Freud. Freud also suggested that psychoanalysis should be interpreted in terms of neurophysiology (Sjögren, 1989, p. 34) to find the ultimate final foundation of mind processes. This has been considered by several psychoanalysts to be one of Freud’s positivistic mistakes or weaknesses.

Regardless of how we judge this ambition, Freud’s theory of the human mind opened the way to a non-dualistic and not-only-rational view of mind and behaviour. Psychoanalysis affirms that there are thoughts and feelings that are unconscious but still meaningful for life and health. It is also important that the unconscious concerns not only *instincts*, but also *moral* imperatives, which can produce feelings of guilt. Psychoanalysis as a dynamic psychology describes unconscious defence mechanisms such as
negation, repression, resistance, projection, identification, and transfer, which can produce mental suffering (Allodi, 1994). Freud writes that psychoanalysis has become “the name of a science that deals with the unconscious life of the psyche” (Freud 1989, p. 61). The definition contains a paradox in the ambition to know what is hidden and unknown. The task of psychoanalysis may be interpreted as being to contribute to an extended reason (where it was, I should be; wo es war, soll ich werden), (Freud, quoted in Lacan, 1989 p. 237), but at the same time as a spur to considering unconscious processes as an integrated part of our nature (vårt varas kärna; Kern unseres Wesen, p. 243). This paradox is a result of trying to cross the boundary between reason and emotion.

One psychoanalytical concept is that of ambivalence, by which Freud meant the contrasting feelings of hate and love for an object. Ambivalence is defined as the coexistence of two opposing drives, desires, feelings, or emotions regarding the same person, object, or goal. The ambivalent person may be unaware of either of the opposing wishes. The term was coined in 1911 by E. Bleuler, to designate one of the major symptoms of schizophrenia (...). Bleuler felt that there were normal instances of ambivalence, such as the feeling, after performing an action, that it would have been better to do the opposite; but the normal person (...) is not prevented by these opposing impulses from deciding and acting. In Freudian psychoanalysis, ambivalence was described as feelings of love and hate for the same person.

In a broader sense, ambivalence also means that contrasting tendencies may influence human behaviour, and it may characterise decisions and conditions. The concept is used not only to describe individual pathology, but also to describe social phenomena (Dench, 1986, Bauman, 1991b).

Neurophysiology and psychoanalysis can contribute to a non-dualistic view of human nature. Overcoming the dualism of theory and practice requires further steps, however.

The experimental method suggested by Dewey is not so simple to apply and he was aware of the difficulties. To understand his meaning, we should consider the social context in the first decennia of the twentieth century, during which he developed the idea of democratic education, and the problems the approach was to solve. At that time, many Europeans emigrated to the USA. They brought different cultures, other than the dominating Anglo-Saxon and Protestant. A large part of the population was of Afro-American origin. These groups risked discrimination, being
considered inferior, not full citizens. At school, too, the white English-speaking middle class had better prospects.

Theories of race and eugenics were flourishing, supporting the idea of a hierarchy between human beings. Dewey’s democratic education was anti-hierarchic and was aimed at solving the problems of minority discrimination. It was also experimental, because experimentation permits the educator to face new educational situations, without reproducing traditional models created for other times and other people. Experimental means that school starts from actual conditions and experience and evaluates results. This prompts schools to change, to develop in different directions.

Dewey warns readers about the difficulties of applying the experimental method, and the risks of superficiality and of inadequate scientific precision. In the early 1900s there was great hope that developing knowledge based on human research would improve conditions of, e.g., health and would contribute to improved practice in education.

New educational practices have developed in many places. The educational experience from the pre-schools of Reggio Emilia exemplifies experimental method in education: a reciprocal collaboration of practitioners and theoreticians, leading to development of new practices and theories. Here we see a dynamic process of innovation that is democratic since it is built on relations and communication, not on a dualistic image of man and childhood since it stresses creativity, production and cognitive abilities that are stimulated by experience and relations. It implies also that the curriculum is developed through the practice, by practitioners, with actual children and their lives - the emergent curriculum (Malaguzzi, 1993, Edwards et al. 1998; Westling Allodi, 1998).

Maria Montessori (1938) too developed her method by applying principles of scientific experimentation: regular observations, interventions, and evaluations:

la Montessori, coniuga continuamente i dati teorici con la verifica sperimentale (...) non si accontenta delle affermazioni di principio, vuole una pedagogia empiricamente fondata, una pedagogia di ricerca. [Montessori constantly merges theoretical knowledge with experimental evaluation (...) she is not satisfied with assertions of principles, she wants a pedagogy empirically grounded, a researching pedagogy] (Piazza, 1998, p. 18)
3.2.3. Knowledge and ethics

Considerate la vostra semenza:
fatti non foste a viver come bruti,
ma per seguir virtute e canoscenza
Dante Alighieri, Inferno, Canto XXVI (118-120)

Consider ye the seed from which ye sprang:
ye were not made to live like unto brutes
But for pursuit of virtue and of knowledge
[Translation by Henry Wadsworth Longfellow
URL: http://www.divinecomedy.org/divine_comedy.html]

The conflict between knowledge and experience may lead to conflict between knowledge and ethics, between objective, rational knowledge and ethical standpoints.

A theme typical for post-modern criticism of modern reason is that in the post-modern world knowledge cannot be considered as objective, since it is biased by interests (Habermas, in Lübke, 1988).

Post-modern criticism can be interpreted as, or lead, to a standpoint of relativism or subjectivism. Relativism implies that it is legitimate that different truths can be valid for different individuals and that consensus is unattainable. Subjectivism implies that individuals may build their own knowledge, independently from actual circumstances in their surroundings.

Apart from these risks, traditional science with its Enlightenment traditions had been criticised since the Second World War for not being neutral and not always conducive to human progress. The criticism was an attempt to take account of the crisis caused by the trauma of Nazism and its persecution and extermination of undesirable groups (among others: Jews, Gypsies, people with disability, homosexuals) (Habermas, 1995).

Enlightenment reason produced a knowledge exempted from ethics and from consideration of the practical consequences for humanity of rational decisions.

The quotation from Dante may be interpreted as an expression of a pre-modern view, where virtue (virtù) and knowledge (canoscenza) are still connected.¹ The reason of the Enlightenment broke this tie. Habermas (1995) analyses modern reason and sees la Terreur in France and its crimes against humanity as a result of the intellectualism of Enlightenment reason: modern reason is in fact exempt from the moral imperative of religion. It was among other things this intellectualist trait of reason that made the barbarism of Nazism possible, in a “society characterised by the
tradition of philosophy, arts and the Enlightenment sciences” (Lübke, 1988, p. 239).

The relations between modernity and the extermination of the Jews and other groups has been noted and analysed (Bauman, 1991a). The extermination camps exemplified by Auschwitz and its goals can be viewed as a modern project working for an authoritarian state. It was a modern state, a modern bureaucracy using technical and scientific knowledge that made possible the extermination of so great a number of people.

Post-modern criticism of ethic-exempted reason is serious, and needs to be considered.

This should not, however, lead to a return of mediaeval dogmatism. Dogmatism was not as effective as modern reason, but it was and is also an ideological ground for – in our view- considerable crime against humanity. Dogmatism implies that knowledge is given, i.e. by God, and cannot be questioned. Verifying knowledge or seeking new knowledge is thus not a relevant task. The irrationalism implies that attempts to reach knowledge through rigorous scientific methods are fruitless, since other criteria (rhetoric, argument, convincement, marketing) decide what we believe, not evidence.

The post-modern criticism of Enlightenment reason risks admitting a comeback of dogmatism and irrationalism, although in new post-modern guise (cf. e.g. Bourdieu’s criticism of post-modern hostility towards empiricism and positive sciences).

It is possible to resolve the dialectics of knowledge and ethics through critical pragmatism, taking account of practical consequences of knowledge for humanity. This standpoint implies a critical attitude to theories, since it is neither optimistic nor naïve concerning progress and development (Skrtic, op.cit.).

Hans Jonas (1979/1991, 1996) was a Jewish philosopher who lived in Nazi Germany before leaving the country, later to fight against the Nazis with the British army. Jonas expresses a possible way to bridge the gulf between knowledge and ethics, and at the same time finds a morality that does not exclude a scientific development of knowledge. In Jonas the human being not only takes account of, but also bears responsibility for, humanity, the world and life, now and in the future.

Jonas seeks to meet reason’s need for ethics with an ethics not grounded in divine law or in individual or social needs, but in a principle found in Nature (Vogel, p. 4 in Jonas, 1996).

Jonas sees in modern society an ethical vacuum, which leads to nihilism.
Materialistic reductionism is the dominating scientific view of nature. Nature is regarded as a machine without values or purposes. An implication of this view is that there are no limitations on human action. If we consider materialistic reductionism for what it is, namely a metaphysical prejudice, and not as the neutral description of our world, we are then free to consider and interpret biology and nature existentially. We can appreciate the reality of values existing independently from us, since all living organisms have a meaning and a purpose: existence, life (Vogel in Jonas, 1996, p. 11). This standpoint allows Jonas to criticise nihilism (i.e. in Heidegger’s existentialism).

According to Jonas the root of modern nihilism lies in the fundamental dualism of humanity and nature.

The idea that nature has no ends and is indifferent to human purposes throws us back on ourselves in our quest for meaning. No longer able to find our place in a sacred order of creation or an objective order of essences comprising the totality of nature, we have lost not only the grounds for cosmic piety, but also a stable image of our nature, even the conviction that we have a nature (Vogel, op. cit, p. 9) [my emphasis].

In Heidegger’s existentialism, the only being to exist is the human being, and nature has no intrinsic meaning.

The world which is concretely analyzed by contemporary existentialism is only our historical world of selfhood and interhuman relations.... (Löwith in Vogel, p. 8).

The problem with existentialism and its authentic human being is that he places himself outside and above moral laws and norms. People make choices, take responsibility from their own individual perspectives and are free to create their own values, beyond evil and good.

That nature does not care (...) is the true abyss. That only man cares, in his finitude facing nothing but death, alone with his contingency and the objective meaninglessness of his projecting meaning, is a truly unprecedented situation.... As the product of the indifferent, his being too must be indifferent. (Jonas, the Phenomenon of Life, in Vogel, p. 9).

Jonas questions this standpoint showing, in a way that does not contradict modern science, that nature with its forms of life is good, that it is worth caring about, and that it is meaningful that the human being, the creature with the greatest freedom in evolution, can take care of it. Doing so, humanity can also continue to exist.
Jonas considers that the human being has reached a higher level of freedom in evolution. Each organism shows a freedom filled with needs. An organism fighting for survival is free in relation to its own substance, but always filled with needs, since it depends on exchanges with the environment to survive. Jonas shows the continuity between forms of life and different levels of “mind” or subjective inwardness. The levels consist of: metabolism, moving and desiring, sensing and perceiving, imagining and thinking. Each implies new dimensions of freedom and risk. The higher freedom of the human being corresponds to higher risks: self-reflection implies the freedom to think about Being, but also the arising of a dualistic dichotomy, since humans can distinguish between subject and object and even regard themselves as objects. The higher freedom implies also the risk of anxiety, guilt, hopelessness, when we judge ourselves negatively in relation to our aspirations.

If the human being regards himself, with his opportunities of knowing and reflecting, as a coming-to-itself of an original substance, he can see himself as called by Nature, our origin, to be its guardian. Jonas’ ethics is thus not based on individual choice, or on social demands, but on an objective imperative founded in natural things (Vogel, p. 13). If nature has an end (life), the human being, as its product, has obligations towards nature. The first imperative to the human conscience is to not destroy what nature has produced: mankind has to take care of humanity, present and future generations.

The archetype of responsibility is the care of parents for child, where the goal of parenting is the perpetuation of the capacity for responsibility itself. (Vogel, p. 15)

The capacity to care, to take responsibility, for other people, and for the image of man, thus represents a core quality in human beings. This capacity is a product of evolution and can explain the success of our species in evolution better than the ability to fight only for the survival of the individual. This behaviour may appear inexplicable and dysfunctional if we consider evolutionary success as the egoistic struggle to survive (Herbert Spencer, 1898/2001). This however does not contradict Jonas’ argumentation, because the capacity to take care of others’ needs is important for human beings, can explain our evolutionary success and is the core capacity we have to transmit to other generations.

Parents’ care of children is the model for this behaviour. When parents take responsibility and sacrifice themselves for their children, they
contribute to transmitting this capacity since their behaviour becomes a model for their children.

In modern society, where social institutions care for children, the behaviour of other adults than parents (i.e. educational staff) may become a model of caring behaviour.

Jonas’ standpoints could have a considerable influence on how we consider children. Children, their education and care, could become a central and precious concern for the whole community, and the most important concept for the future of humanity.

Since the consequences of our actions can be difficult to predict, pragmatical advice is to strive towards modest goals. The Utopian starry-eyed ethic of perfection implies that our present condition is not considered good enough. Jonas suggests instead a more rigorous ethics of responsibility. This means working for limited and foreseeable improvements, inspired by veneration for the image of man.

Jonas’ ethics, grounding the norms of ethics in nature and its being, can be a starting point for knowledge that is not ethics-exempt like Enlightenment reason is.

Since care and responsibility for others are emphasised as fundamental for humanity and the world, this philosophical standpoint has wide implications for the science of education. The theory corresponds also to Dewey’s idea of the necessary overcoming of the boundaries between humanity and nature, to which he believes evolutionism should contribute.

3. 3. Traces of Otherness in Western history

Having discussed some theoretical standpoints and outlined possible solutions to epistemological conflicts so as to delineate a development of knowledge that embraces both ethics and pragmatics, I now turn to a process of distancing. A historical survey of what has been considered as diverse, can provide tools and concepts that may be useful in understanding the special educational situation. The historical discussion does not claim to be complete, but I give examples of situations emerging in the Western history of ideas and religion.

Otherness (French alterité) means being diverse, unlike other people. According to Lübke (ed.) Filosofilexikonet, 1988, p. 27, otherness, for Hegel, is:

1. to be predetermined in relation to something else or someone else, and thus to be something else or someone else for this other. 2. To have come outside oneself in something else (...) to be externalised or to be objectified (...). 3. To
be someone other than oneself; to be another, to be a stranger to oneself (alienation).

Western history may help us to understand and to see from other perspectives actual practices towards people perceived as others (different, diverse) and the import of these perceptions.

In particular I will give examples of criteria arising in Western culture to draw the boundaries between We and Others and the treatment society has reserved for people defined as Others. This treatment may be regarded as a sort of pedagogy, as an immanent pedagogy (Ödman, 1998), or in some cases even as practised pedagogy, though not always evident and visible at first.

3.3.1. Antiquity and the Others

A reminder (…) of how difficult it can be for a stranger to cease being a stranger to others.

Claudio Magris, Mikrokosmos, p. 74 – [present author’s translation]

The concept of identity is fundamental and specific to Western culture (Galimberti, 1987). It implies the possibility and even the necessity to define those who are unlike us. This definition is a prerequisite for defining who we are, our own identity.

In antiquity (i.e. Athens, Rome) the right to define the conditions for identity was reserved for those who had the status of citizen and could enjoy the freedom and the rights connected with that status. People with limited rights were e.g. slaves or aliens permitted to live and work in that society, but they were not citizens. Women had often - but not always - more limited rights than men of the same class.

Aristotle in his Politic speaks of human dignity or worth. This worth depends on virtue, strength, wealth, descent and freedom - the combination of these qualities representing an ideal that was present in that society, according to him. At the same time, the absence of some of these qualities indicates who can be defined as Others in relation to the Elite.

The treatment of Others mentioned by Aristotle is the expulsion of strangers (p. 123), directed at groups of strangers settling in an area, and ostracism or banishment (p. 191) that “stops those who stand out in some way and drives them into exile”. These treatments are reactions against those who could be considered as threats to society, i.e. through rising numbers or rising influence.
One may deduce that to the Elite, the Others were the physically weak, the poor, the strangers and the slaves. Those who were banished had been influential citizens, admittedly, but were suspected of lacking virtue since they looked more to their own interests than to those of the country.

We can consider that physical removal, rejection and exile are still used in our world for e.g. refugees and political opponents.

Those defined as Others vary periodically depending on social structure and ideology.

Aristotle’s general definition of human worth may be useful for comparing different periods in the history of ideas and observing how Others have been defined and what treatment has been suggested.

3.3.2. Religion and the Others

I discuss here some aspects of Western European religious belief with reference to the concept of otherness. I limit the discussion to these aspects and do not refer to other important religions.

The message of Christian religion in for example the Epistles of St Paul, with their emphasis on the equality of believers before God, must have been appreciated by the oppressed masses of the Antique world. They could have some hope of liberation and freedom - although in another world (Donini, 2002). The emphasis on human weakness and ignorance may also be seen as a reaction against the classical ideal of strength. In the beginning, the Christian church is presented as a persecuted community that does not use force to gain advantage, but uses conversion, the power coming from the conviction of conscience.

The early Christian human ideal is very different from the predominant human ideal of Antiquity. The Christian message in relation to the weak, poor people of the community is pietas (compassion) and caritas (regard, benevolence, love).

In Paul’s writings it is possible to see an early cosmopolitanism, based on the same faith: in the house of God there are no strangers.

As the Roman Church established its position, however, it also defined those who were Others. In particular, those who did not believe at all, or in the same God, or were heretics, risked being seen as Others. Infidels could be enemies to fight crusades against, or people to conquer and colonise, or groups living together with Christians but yet separate from them, as were the Jews.

The measures against them could vary depending on the political situation. They could enjoy a certain tolerance, be given social security,
but most of the time they suffered from limited rights. In certain periods, they could be discriminated, persecuted or banished, their property confiscated. They could also be forced to convert or executed. The history of the Jews in European countries in the Middle Ages and later, gives examples of all these treatments (Milano, 1963).

St. Augustine explained the origins of the Roman Church oscillation between a certain tolerance of the Jews and discrimination against them. This attitude is grounded in the need to protect a people who had the same holy texts as the Christians, since their existence proved the truth of the Christian faith; but also in the need to maintain this people in an inferior position. Their conditions were to be a proof of the superiority of the Christian religion. Augustine’s conclusion was: to have the Jews survive as slaves of the Church, killing them is not allowed (Jansen & fl., 1991, p. 21).

The Jews were not to enjoy the rights and status of citizens until 1791, in France, later in other European countries. Hence the policy of discrimination begun by the Church has been effective for many hundreds of years.

As well as the Jews, philosophers and humanists or scientists who presented facts and theories deviating from Christian norms and dogmas risked persecution, imprisonment or execution by the Holy Inquisition.

One modification of earlier views brought about by the Reformation lies in a clearer objectification of Evil. Luther’s Small Catechism (1529) shows us an individual – not in the first instance a congregation – struggling against the Evil in himself and against Sin. Evil cannot be entirely defined in other, alien, people but has approached us very closely. This means that we ourselves can become Others and we cannot really do anything about it. It may be a comfort that God punishes those who sin. At the same time it means that those who are punished (by society and its representatives) have sinned and deserve their punishment.

These aspects of religion contributed to making the Reformation an effective and self-regulating means of education. This view can constitute the basis for a sharper demarcation between Us, the virtuous, the chosen, and the Others, the sinful. The strategies proposed for controlling individuals concern teaching and imposing discipline. The Others are not defined once and for all: we must combat evil to convince ourselves that we are among the saved. Luther believed, for example that children with disabilities were children of Satan (Grünwald, 1989 pp. 29-30, Wing, 2000).
The success of the Protestant revolution is also based on its ability to support political desires for independence from Church claims to control and influence. This could provide support for the development of a modern nation and of a local identity.

3.3.3. Politics and the Others

History shows many examples of situations where political opponents or persons representing different political positions have been persecuted.

The most merciless action against minorities and political opponents probably occurred during the twentieth century, in authoritarian and totalitarian systems, with exile, banishment, unjust confinement, torture, deportation, terror attacks, execution, murder and genocide. Deported labour has also been exploited in work camps under extreme conditions, depriving the victims of their human dignity (Levi, 1989).

The concept of nation, the modern national identity emerging in the nineteenth century, causes members of other nations be considered as others, according to Zygmunt Bauman, philosopher and sociologist. Bauman (1991b) asserts that the presence of people not belonging to a nation or not pursuing any national project (i.e. Jews, Gypsies in nineteenth-century Europe) represented a menace to the “host” nation’s identity.

Peaceful strategies for creating an unitary, homogeneous nation have been assimilation and education. Assimilation may however imply limitations on minority group rights, e.g. concerning the recognition of other languages and the right to use them, or the freedom to settle anywhere.

Common education is important in creating a shared national identity, since it facilitates the transfer of shared values, sometimes of a common language.

Another strategy in the modern state towards those who cannot be assimilated is sorting. Where assimilation is impossible, it becomes important to sort, to draw clear boundaries between the homogeneous group and those who deviate (Bauman, op. cit.).

In the pre-modern state, e.g. Venice, there were strict boundaries between Venetian citizens and other groups. Regulations and prohibitions prevented association between the different groups, as Riccardo Calimani writes in his history of the Venice ghetto (1995).
The Jews were considered not citizens but guests; they were separated from the rest of the population by the walls of the ghetto, whose limits were locked and guarded at night to prevent anyone going in or out.

The first Jewish group had reached an agreement giving them the right to live in the city of Venice by about 1400. They could conduct certain economic activities, but the conditions could change in relation to the needs of the Venetians and the current domestic politics. Venice could guarantee the security of the Jews and the possibility to maintain their own religion and culture - which was not always the case in other states.

In the beginning the Jews themselves pleaded for a special place to settle down, where they could get protection. Only after several years in the city, in 1516, did they get the permission to such a segregated place. Ghetto was the name of the islet to which the first segregated settlement was directed. The Ghetto thus began as a concession to satisfy a need of protection and security.

After many years, and as society changed, the segregated settlement gained a different connotation, that is, of coercion. The boundaries were maintained actively from outside.

The Jews were able to settle in Venice, since the city needed some banks where people could get loans. Loaning money with an interest rate was considered wrong by the Christian religion, while the Jewish religion did not prohibit it. In the beginning loaning was a privilege, a concession, but over time, through agreements and continuously worsening conditions, it became an obligation for the Jews, even when it was not profitable (Calimani, 1995).

In certain periods, the pressure to convert to Christianity increased (cf. Bauman’s concept of assimilation). These tendencies however never became as strong as in Spain. The relative tolerance of the Jews and their religion was based on the fact that they were separated from the rest of population and did not have the same rights.

This segregation continued to the middle of the nineteenth century, when all the inhabitants of Venice were accorded the status of citizens, after Napoleon’s invasion of the city (Calimani, 1995).

The history of the Venice Ghetto supports Bauman’s analysis, in that a radical change occurred with the French revolution and its ideas of equality, universalism, cosmopolitanism, individual rights and freedom. These are necessary conditions for according all inhabitants the status of citizens.

Bauman (1991b) outlines some consequences of this radical innovation that were to create fear and resistance in modern Europe. Groups who had
lived in the same place, divided by visible and invisible walls, could no longer be defined and individuated. In the modern world, religion became also for many people a less important basis for identity than previously.

The disappearance of boundaries and walls was a new occurrence in the nineteenth-century establishment of modern nations in Europe.

This modernisation, together with the rise of national projects, underlay a fear of what was indeterminate, a blending without control, which questioned national identity and redefined it in a way that was not always desirable. This fear and this resistance then offered good soil for the growth of nationalism, racism, intolerance and Nazism during the twentieth century (Bauman, 1991b).

3.3.4. Deviance and the Others

A historical survey of attitudes towards children with disabilities or in some way different (Safford & Safford, 1996) indicates contradictory tendencies occurring in all ages: abandonment on the one hand, and protection and care on the other, are both documented in most societies.

The decision to abandon or to care, educate and nurture depended on the needs of the group to which the child belongs, argue Safford & Safford.

The different treatment reserved for disabled children is summarised by these authors under extermination, ridicule, asylum, and education. The possibility of education and instruction was introduced and established for larger groups with the affirmation of Enlightenment ideas.

When the body was affected by contagious illness or deformity, the affected person could lose rights and freedom. Care and treatment occurred in some cases, but also segregation, rejection, neglect in others. Some illnesses also seem more stigmatising than others: one affliction turning people into alien Others has been leprosy.

Leprosy disappeared from Europe during the fourteenth or fifteenth century (Braudel, 1989), but survived in endemic form in many warmer areas, where European colonists met it in the nineteenth century. The practices introduced at that time are interesting to exemplify processes that may work even in other less stigmatising cases; although not with the same obviousness. Note that the word ‘stigma’ means a mark of disgrace, a visible sign of a disease, and was also originally a physical mark put on slaves.

An institution for the compulsory care and exile of sick persons was established in 1866 in Kalaupapa (Hawaii). It became a model for other
institutions throughout the world. The isolation of lepers had been normal previously, but at that time this practice became institutionalised and legal. Laws were introduced to regulate the internment of the sick and limiting their rights regarding issues such as property, marriage and the care of children.

According to Gugelyk and Bloombaum (1979), two authors who studied Kalaupapa through interviews with inmates, leprosy can be considered as a totally maximal illness, since it meets a series of criteria:

(...) be externally manifest, be progressively crippling and deforming, be non-fatal and chronic, running an unusually long course, have a fairly high endemicity, but not epidemic, be associated with lower standard of living, appear to be incurable, have a long incubation period” (op. cit., p. 10-11).

Compulsory segregation was traumatic for many inmates. They often reported experience of discrimination, prejudice and ignorance, from people outside their own community: family members, caregivers, teachers.

New treatment permitted the inmates to move from Kalaupapa, but most remained there, considering the community at least as a home where they were accepted.

Segregation thus arose first to protect the surrounding community from infection. This corresponded most to the needs of the white population, according to Gugelyk & Bloombaum, even though the illness mostly affected the native population. Separation from the surrounding community implied also extensive limitations of the patients’ rights.

During this separation a common identity and culture developed among the internees and also a political movement for the right to self-determination, the right to choose where to live and what care one needed. Separation as a result of self-determination then became something to fight for.

During the nineteenth century people with cognitive disabilities started to receive attention and treatment. According to a historical survey by Leo Kanner (1964/74) different phases may be distinguished internationally. After the first pioneers, there followed a period of institutional expansion and recognition of the heterogeneity of the “feebleminded”. There was a period of introduction of special classes in schools and of measurement of intellectual adequacy so as to find criteria by which to differentiate children. Next came the period of the great eugenic alarm, from 1910 to the Second World War.

The first period was characterised by the first efforts of physicians such as Itard and Seguin in France to educate mentally retarded children.
The French Academy highly valued these efforts. Itard (Malson, Itard, 1799/1972) showed instructive processes that gave positive contribution to educational science, with results of interest to all who work with children. Seguin later developed Itard’s intuition regarding the physiological method, which was also to inspire Maria Montessori.

In the second half of the nineteenth century, in many European and American countries, several institutions were established for children with various functional impairments. By 1878 there were 33 in Sweden. In 1866 there were 25 public institutions in the USA. Norway was the first country to introduce compulsory education for “normal and abnormal” children alike, in 1877.

Physicians studying persons with mental retardation began to individuate the heterogeneity within the group: they delineated “disparate entities in which intellectual shortcomings were a common denominator” (Kanner, op. cit. p. 102). The first classifications were based on etiology (Down) or language (Esquirol).

Alfred Binet was appointed by the French Minister of Public Instruction to study forms for adequate schooling of children with mental retardation:

The task assigned to him was one of devising a method for selecting from the children in the schools of Paris those who could not adapt themselves to the curriculum, and thereby reduced the efficiency of the teachers and fellow pupils (Kanner, op. cit., p. 120).

Binet, with the aid of Simon, examined thousands of children and presented them tasks of varying complexity. They then determined statistically what the majority could do and could not do at given ages. It then became possible to establish a scale setting up a norm of performance.

The presence of a scale of intelligence had many effects. One was the following: if intellectual ability was no longer an absolute quality, and on the contrary there were gradations in ability, a quite large group of people were performing below average and had not yet been identified. Goddard in 1910 called them “morons” (Kanner, op. cit., p. 123). The “discovery of the morons” was alarming:

Our public systems are full of them, and yet superintendents and boards of education are struggling to make normal people out of them. One of the most helpful things that we can do would be to distinctly mark out the limits of this class and help the general public understand that they are a special group and require special treatment, in institutions when possible, in special classes in public schools, when institutions are out of reach (Goddard, 1910, in Kanner, op. cit. p. 123).
The term *eugenics* was introduced in 1883 by Galton as the science connected with “all influences that improve the inborn quality of a race” (ibid. 128). The fertility of the “unfit” was considered a major problem.

Ideas of a hereditary transmission of mental problems, abuse, and criminality were introduced and supported with case studies of families, in the first decades of the twentieth century. These studies were superficial and of dubious validity, but “they made a great emotional impact”, contributing to “the eugenics scare”. The consequences for those with mental disabilities were dramatic: they were perceived as a threat to the future of civilisation.

The feebleminded person became an object of horror and aversion. He was looked upon as (...) a useless dangerous person, who should be ostracized, sterilized, and segregated for his natural life at public expense (Fernold, 1924, in Kanner, op. cit. p. 134-135).

These ideas were also to lead to the application of *euthanasia* programmes in Nazi Germany, in hospitals and institutions for children and adults with mental retardation or mental illness (Hilberg, 1992/1997, Disability Rights Advocates, 2001).

Other countries were to prefer other solutions: institutionalisation, colonisation and sterilisation were the best “reactions to the existent problems” (American Breeders’ Association, 1911, cit. in Kanner, p. 135). Restrictive marriage laws between people of different races were also introduced in several states in the USA, a testimony to the contemporary power of the ideas of race and of hierarchy among human beings. Between 1900 and 1927, eugenic sterilisation laws were passed in the USA and in 1929 in Denmark. In Sweden the first sterilisation law was passed in 1934, followed by a more effective one 1941, also allowing compulsory sterilisation.

The interest in people with cognitive disabilities began as a philanthropic enterprise by enlightened, socially committed physicians. It continued with the work of psychologists and teachers, finding selection methods to individuate pupils of different abilities and ended, under the influence of eugenics and racism, in disciplinary and punitive interventions such as colonisation and forced sterilisation. In the most extreme cases, as in Nazi Germany, euthanasia was advocated for such persons.

According to the analysis by Mårten Söder (1978), Professor of Sociology in Uppsala, the Swedish institutions for the mentally retarded showed similar tendencies. In the beginning there was an optimistic ideology, emphasising treatment at the institution and its importance for
the child’s development. There was an ideology of care and protection, since the staff believed that the segregated institutions could protect children from a hostile community. The children would develop better in an institution than in a family. Later, the separation and segregation of persons with cognitive disabilities shifted to the need to protect society from such persons, who were considered dangerous.

An example of an institution with the function of separating from the community individuals regarded as harmful, was the colony for young men on the island of Livø in Denmark at the beginning of the twentieth century. This has been studied by Birgit Kirkebæck (1998). The men at Livø were interned for indefinite periods, often for offences/ faults and not for cognitive disability. One principal function of the institution seems to have been to prevent the men from fathering children. The institution had thus a social-hygienic and disciplinary purpose. Limitations to the right to sexual life and fatherhood were justified by the “moral weakness” of the internees, according to Kirkebæck, with segregation and sterilisation as means.

Later examples of institutions of other character, philanthropic and humanitarian, are Janusz Korczak’s homes for Jewish and Polish children in Warsaw. They were established in the early twentieth century as a solution to social problems (poverty, illness, malnutrition, the increasing number of parentless children after the first World War) and related needs (good nutrition, good habits and education). Janusz Korczak personally directed the home for the Jewish children.

The home was intended for children without parents or those whose parents could not take care of them and give them an education. It was supported by charity and voluntary work. The children were required to obey normal regulations. It happens that some were expelled, but only after serious and repeated transgressions (Lifton, 1997). Korczak knew that his homes could not help all the children who needed it: it was thus important to help those children who could benefit most. The homes were organised on democratic principles, children were treated with respect and not punished physically. Different forms of self-regulation and activity were introduced to make children participate and take responsibility for the life in the community (Korczak, 1918/92).

3.3.5. Critical analysis of human rights’ violations

The post-war period saw the growth of critical analyses of modern society, its institutions and reason.
Already in the 1960s and 1970s studies were conducted of institutions for mentally ill patients and the destructive effects these institutions had on the inmates (Goffman, 1997). In the same period, many movements struggled for the recognition of their rights and against discrimination because of social background, sex or disability. Modern societies have recognised these rights as universal. There are laws against discrimination, and even special institutions to support people who risk discrimination. At the same time, oppression, discrimination and marginalisation of people perceived as different (or stigmatised) have occurred in modern society and are still going on.

Bauman’s critical analysis of modern society (1991a) considers that a contemporary social theory cannot neglect the fact that the systematic extermination of Jews and other groups was possible in the modern world. Social theorists must consider that it happened and try to understand why it was possible.

According to Bauman, we cannot consider this event as an incident in an otherwise completely rational and functional development, but we have to criticise the sciences and reason that render genocide possible. Bauman’s criticism throws a sinister light on contemporary society, its institutions, predominant values and rational methods.

His analysis of what happened in Nazi Germany and Europe is based upon the historical work of Raul Hilberg (1985/1999).

A difference between the Holocaust and previous episodes of persecution or anti-Semitism was its enormous proportions. This is because it was a systematic project, using modern, rational and effective methods, governed by a modern bureaucratic structure.

The Holocaust was not the result of occasional outbursts or blind violence, but the result of an – at least roughly – reliable, rational bureaucratic apparatus working efficiently to reach the goals set for it.

The first violent actions against the German Jews received little support from the German population. Some showed solidarity with the Jews they knew. For this reason other strategies were introduced: one being a dehumanisation of the victims (Hilberg, 1985/99): feelings of empathy could not arise so easily if spontaneous connection with the victims was broken off.

The administrative processes were gradual, in order to avoid resistance and suspicion. First a definition was implemented, and then an administrative division of people into groups with different rights in hierarchical order, and then a progressive limitation of rights. All these measures rendered discrimination possible, e.g. through expropriation of
property and capital, limitations on work and residence. Yet further steps were concentration and segregation (e.g. in the ghettos) and then deportation.

At this point the progressive intervention had created distance and boundaries between groups, so that reactions of solidarity and support were rare. The Jews became strange and invisible Others. Different methods were used in the camps to avoid resistance: one of them consisted in a rational division of labour intended to weaken people’s feeling of responsibility.

The educational system in modern states is a part of a bureaucratic apparatus, expressing different tendencies in different periods, emphasising different goals in different contexts. We can view the system from a “top-down” perspective, as a controlling authority, or from a “bottom-up” perspective representing individual opportunity and rights. We can resolve these two perspectives on the concept of compulsory school attendance, i.e. with an emphasis on the obligation to attend, and with the concept of the right to education.

During the twentieth century in many countries the school system changed, from being divided in different forms, towards more unitary school systems (enhetsskola in Swedish).

In Sweden the educational argument at the beginning of the twentieth century was that lower-class children should get an education, if they had the necessary ability. This political debate may be seen as a struggle for a broadened right to education, but also as the result of an increasing need for an educated work force.

Less intellectually endowed children should attend help classes (See Rolf Helldin, 1997, for an account of the educational and political debate on these matters).

With help classes, a further category of Otherness is created: the unable, the not intelligent, and the unendowed. In Aristotle’s definition, we are still dealing with a kind of “strength”, an intellectual one.

In Sweden there has been strong support for a democratisation of education, but coupled with continuing support for a separate school form (särskolan), for children with learning disability or mental retardation (IQ<70) - brain damage or autism (grundsärskolan, special units). There is also a school form for children who are considered incapable of learning to read and write (träningsskolan, training school). The possibility for children eligible for särskolan to attend a regular class has increased in compliance with international agreements (Salamanca statement, UNESCO, 1994).
Despite good intentions and the regulation of integration, the number of children enrolled in special units increased by 62% between 1993 and 1999 (National Agency for Education, 2000, p. 20). The increasing numbers of children in special units have been associated with a tendency towards medical diagnostics. “A biologist point of view” is considered to contribute to this trend. This interpretation is not corroborated by a National Board of Education study (2000:2037, p. 19) showing that municipalities where physicians participate in the investigations preceding placement in special units, have a more restrictive policy, and thus show a lower increase than municipalities where physicians do not participate. Thus contradictory forces are acting in the Swedish school system regarding attitudes to and policies for pupils regarded as different or having learning disabilities, leading to different treatments and sometimes, therefore, to unnecessary marginalisation or discrimination of pupils.

An earlier example of a critical analysis of the educational system and its selection and marginalisation processes are presented by Milani (1967). Here Lorenzo Milani, an unusual and uncomfortable priest, together with his pupils, who had been rejected by the regular school, reveals, through analysis of education statistics and personal stories, the injustice of the selection processes in the compulsory school. These processes are not neutral and impartial, but they strike at and discriminate against pupils from economically and culturally disadvantaged groups.

Milani and the boys from Barbiana suggested that the selection in compulsory schools must stop. They demanded that the repetition of school years should be abolished and that the demands of school should be adapted to children’s different experience and conditions. The book is directed to a teacher who is responsible for the selection processes. Its purpose was also to make teachers aware of what they are involved in, of the importance of their work and of their responsibility. Milani also adopts a position in the debate about conscientious objectors: refusing military service was illegal at that time in Italy. Milani was charged because of a letter to a newspaper defending the right of objectors to follow their conviction. In a letter of defence to the judges of the court he wrote of the teacher’s special responsibility to take a stand against injustice, if the purpose of school is to educate responsible and democratic citizens.

I have to teach them about how a citizen should react to injustices, that he has the freedom to say and write what he wants to (...) that each must feel responsible for all (...) On one of our school walls it says in large letters I CARE! The exact opposite of the Fascist motto DON’T GIVE A DAMN! (Milani, 1966, p. 6).
Regarding their lives as tomorrow’s steersmen I cannot teach my children that the only way to love the law is to obey it. All I can tell them is that they must respect human laws to the extent that they obey them only when they are just. (...) When they see that laws are unjust (...) they must as citizens struggle to have them changed (op. cit. p. 8) (...)

(...) tell young people that they are sovereign, that obedience is no longer a virtue but the subtlest of temptations and that they should not reckon on using it as a defence (...). Each person must, alone and indivisible, feel responsible for everything (p. 14).

Milani’s position was also influenced by his experience of an authoritarian Fascist regime and by its unjust laws. He drew from this experience some consequences that are important for education. The contradictions between technical/scientific possibilities and ethical responsibility described by Bauman (1991a) were also noted by Milani, who hereby shows a possible way for education in a society developing towards increased democracy.

3.3.6. The paradoxes of the Enlightenment and modernity

Aristotle’s definitions of human worth as depending on strength, virtue, richness, birth and freedom imply an outlook on humanity that does not correspond to the ideals of the Jewish-Christian tradition or those of the modern Enlightenment tradition with its concepts of equality, universalism, and liberalism. Despite this, during the course of history, people considered and defined as being different have been viewed as less worthy, have lost or never gained rights and freedom, have been categorised and segregated.

One interpretation of the contradiction between the ideal of equality and the reality of categorisation and segregation is that Western ideals are not applied to every human being but are reserved for an elite.

It seems that the definitions of the classical world still operate de facto, despite the official and generally agreed values. The hierarchy between categories of people was more open and fixed in Antiquity. The boundaries of the hierarchy have possibly become more fluid, invisible; and they are no longer supported by laws. The criteria have changed. There are however examples to show that notions about the hierarchy between groups have existed even in modern societies and sanctioned political decisions and policies, discriminating people considered of less worth.

The Enlightenment was looked upon as marking the birth of modern society and modern reason. New understandings of humanity, knowledge
and the world were established. One important concept was equality: that each human being, irrespective of group affiliation, ethnicity, religion, birth, income, sex, health condition, is entitled to the rights of citizenship. This principle made it possible, for instance, to give to the Jewish populations of many European countries the status of citizens after centuries of separation.

The same principle supported other groups with limited rights in their struggle for recognition and rights (e.g. women, children). Many countries agreed on a universal statement on human rights, the rights of children and eventually maybe the rights of disabled people.

Typical of modern reason, is also the belief in human progress, a development based on knowledge and science, not by dogma and prejudice.

The separation of ethics and reason has had grave consequences for humanity. However, the principle of scientific development has had important consequences for education. From this idea grew a pedagogical optimism, leading to great concern to educate and instruct children previously considered uneducable. The institutions established during the nineteenth century in many countries had the optimistic intention to give children who had been isolated and hidden the right stimulation and a more meaningful life.

The segregating institutions met justifiable criticism during the twentieth century. We can however acknowledge that optimistic modern reason and belief in scientific methods generated the interest and the will to develop methods and techniques – e.g. Braille or sign language – for educating people with disabilities. Special education grew also from the idea that it is possible to influence and educate children previously considered uneducable. The principles of equality and of legitimate and necessary educational intervention to improve the quality of human life thus contributed to increased participation for previously excluded groups.

On the other hand, modern reason contributes to the idea of nation. The definition of nation includes the concept of equality-as-uniformity as a value and a goal to work for. Modern nations and their administrations were organised with rational methods and worked with different means to create homogeneous nations and common national identities (Bauman 1991b). A centrally standardised and general education became a means to assimilate the population.

At the same time as the concept of equality-as-equal-opportunity was the basis of movements for increased rights, nationalism required that different groups should be uniform /equal: hence, differences were also
something to worry about. Nationalism presumes and expects a homogeneous population and *homogeneity* then becomes a value. In a modern state that uses social engineering (the gardening state, Bauman, op. cit.) deviant minorities risk rejection or assimilation, or being sorted, segregated and discriminated.

The national project seeks assimilation and normalisation, to make uniform those who are different. But the national project is also contradictory: minorities become objects for contrasting expectations that are impossible to satisfy. Minorities may thus be prisoners of paradoxical expectations expressing an *ambivalence* towards deviant minorities (Dench, 1986).

The concept of *equality-as-uniformity* can be connected with a top-down pressure, where social needs influence, shape, organise rationally towards a well-sorted and homogeneous society. But *equality-as-equal-opportunity*, in a bottom-up perspective, means that individuals and groups maintain their right to be considered of equal worth, even if they are different. These two meanings of equality may be confused with each other, for instance in educational politics.

In this section I have focused on tendencies and strategies in the handling of individuals and groups. Historical examples show that conflicting tendencies may coexist, and also that what initially has a positive valence can get a negative meaning. What starts out as protection, may become a prison, like the Venice Ghetto.

The right to education may for some disadvantaged groups mean exposure to marginalisation or hierarchical sorting on the basis of ability. I have also considered educational interventions that were successful in working with disadvantaged children (Korczak, Milani). These experiences were also characterised by responsibility for humanity and humanism.

During some periods and with support in various ideologies (religious notions, political ideas and pseudo-scientific theories) those who were perceived as different were defined as a danger to civilisation and humanity. Discrimination, limitations of rights, disciplining or punitive interventions, and in extreme cases extermination, have been perpetrated against those for various reasons considered different. Other, humane, notions have prompted support of and solidarity for people in situations of disadvantage. The support in some cases depended on the presence of institutions specialising in a particular condition, e.g. a disability. The problem in this case can be that the person with a disability is not considered as a subject, the focus being only on the disability.
Another problem is that the community periodically decides what policy is best for certain groups of people (e.g. Kalaupapa, see above) and that these groups can find it difficult to make their voices heard. The principle of self-determination seems important for avoiding offences against those who receive support and care. When describing and analysing organisations and institutions it is also important to consider the different meanings they can have for the people within them and not to settle for abstract discussions.

We conclude that interaction between individuals, within groups and in society is central to investigations of special education.

3.4. Interactions in educational organisations

Interaction can be considered as a flow of actions and events that can have various meanings.

Children at school are participants in an educational organisation with its own goals and strategies, determined by various instances within and around the school. They are also members of formal and informal groups forming at school and in the class, where important relationships are established with other children and adults. Children at school are also developing individuals, constructing knowledge of their world and themselves in relation to other persons.

I focus on some aspects of these interactions that have been analysed in various fields. Note that these aspects are not separate units. I connect them with theories that focuses on these interactions.

3.4.1. Self-concept

Self-concept is defined as the awareness by the individual of his/her own identity. It contains the image of the actual self, but also the image of what one wants to be (an ideal self) and a valuation component coming from the comparison between the actual self-image and the ideal self (Lawrence, 1996). Self-concept depends not on the objective situation, but rather on the subject’s interpretation of earlier life experience (Rogers, 1951).

According to Mead’s (1934) interaction theory, self-concept arises through interactions with other significant persons. The image of ourself is thus influenced by the image that other persons have of us, if we consider their opinion to be of worth.

Goffman (1997) defines this as a negotiation process between individuals during interactions. The individual can actively question the image of him/herself that others communicate. In relationships of unequal
power the individual has fewer possibilities to resist a negative image of him/herself communicated by others, e.g. through their low expectations.

Goffman’s studies of institutions for the mentally ill show how stereotyping and stigmatisation contribute to a loss of the feeling of identity, because the inmates lack any power to resist the definition of them by the institution. Goffman describes the strategies the individual can use in relation to the social units and institutions to which he/she belongs. He/she can be *recalcitrant* to show “some selfhood and autonomy beyond the grasp of the organisation” (Goffman, 1997, p. 87). He/she can be *mortified* in institutions forcing contacts and social relations with persons expressing a disparaging image of oneself. Other strategies of defence against delusions and failures are consolation and compensation.

The self is stigmatised when individual characteristics are considered undesirable. This “undesirable different-ness” can then generate discrimination. The stigma can be a quality that is interpreted as a sign of moral weakness, or be grounded on the view that people of other religions, cultures or nations are of less worth (*tribal stigmas*) (Goffman ibid). Bandura (1989, 1995) presents convincing examples from various studies showing that the feeling of self-efficacy, the feeling of being able to succeed at a task, increases the cognitive involvement and leads to better performance. A positive concept of self and one’s own abilities leads to good performance and use of inherent potential. On the contrary, a poor self-efficacy conduces to incomplete realisation of potentials, and consequently to lower performance.

Negative feedback is related to subsequent diminution of performance, e.g. when a child does not believe her or his own efforts can affect the results. The child may try to avoid experience where he/she expects failure. Self-concept and self-efficacy may therefore be important factors as multipliers or brakes in learning situations.

A national evaluation (SOU, 1974) showed in the 1970s that children who received special education for a long time did not reach the minimum requirement for compulsory school. Special education could be considered as a risk, since it socialised children into roles characterised by low expectations and performance. Special education then became counter-productive.

Segregation and stereotyping of children in separate groups reinforce and preserve these children in low-performing roles. A longitudinal study concerning children with mental retardation who where unidentified and continued in a regular setting also showed that these pupils performed as
well as or better than those in special-educational settings (Sonnander et al., 1993, Emanuelson, 1997).

Stangvik (1979) also demonstrated that pupils in differentiated settings differed from pupils receiving special education in regular settings. The latter had poorer self-concept, but they performed better and had higher expectations of themselves than the former. Differentiated pupils have fewer occasions to compare themselves with other children who are performing better. This could explain their better self-concept. Conversely, this effect could be connected with the specific situation. Children in the differentiated group did not perform better than pupils with support in regular classes. The higher teacher/pupil ratio and the supply of teachers with more training did not give the expected results. One interpretation may be that the placement in a differentiated group implied a lowering of expectations. The higher self-concept was reached through a more modest ideal self.

A sociological study by Näsman & Lundén (1980) on processes of decision about pupil care (elevvård) in compulsory schools also showed the effect of stigmatisation. The care of pupils in need of support implies separation from other children. The pupil is treated in a different way and risks becoming an outsider, or a deviant. He or she is then identified with a group of deviants that crystallises from this practice. Children belonging to those groups will have poorer opportunities in their school careers and at work.

In a longitudinal study Murray (1997) investigated school careers for youths with low education. The group that stopped after comprehensive level and the group that dropped out from upper-secondary school had poorer self-concept and more difficulties at school than the comparison group, even if their performance corresponded to that of students on the vocational courses at upper secondary level. Earlier experience of special education and tracking (level grouping) correlated with a poorer educational career, even when controlling for other variables such as family background, cognitive ability and parents’ attitudes to education.

3.4.2. Psychosocial environment

A starting point for studies on psychosocial environment and class climate has been Kurt Lewin’s field theory (1936, 1951). Lewin’s contribution was to show how the environment and its interaction with individuals’ characteristics are important for explaining behaviour. Behaviour is thus considered as a function of both the individual and the environment.
In a classic experimental study Lewin, Lippitt & White (1939) investigated the effects of three different leader styles (democratic, authoritarian and laissez faire) on groups of youths. They looked at the effects on aggressiveness, productivity and interactions in the group. The leader style had a considerable effect on the level of activity and involvement, and on the relationships. The best results were obtained by the democratic leader. The authoritarian leader produced submission or aggressive reactions. Participants’ frustration could express itself as aggression towards other participants or a scapegoat. The laissez faire leadership was not productive and was also characterised by aggression.

The psychosocial environment or social climate is formed through interaction in the group and is influenced by the direction, the quality and quantity of the relations occurring in the group (Moos, 1979). Moos (op. cit.) developed a model to describe psychosocial environments on the basis of extensive studies on educational environments, hospital, prisons, colleges, etc. Social environments may be described through considering three fundamental aspects or dimensions:

The three dimensions are:

- **Relationship dimension:** the type and the intensity of the personal relationships in the environment, the level of involvement and the occurrence of readiness to help and support each other.
- **Personal Development Dimension:** the basic direction of individual development within the environment.
- **System Maintenance and System Change Dimension:** whether the environment is well organised with clear expectations, control and adaptation to variation and change.

Moos later studied (Fraser & Walberg, 1991) the relationship between school, work and home background.

Researchers have distinguished between the social working environment at school level and at classroom level. While classroom climate is influenced by the relations between teachers and pupils, school climate is influenced by the relations between teachers and school directors (Anderson, 1982; Fraser, 1986). Fraser (op. cit.) presented results from a great number of studies in various countries. These studies showed correlations between the social environment in classrooms and variables such as learning and attitudes, even when other factors were controlled (home background, cognitive ability, age, quality and quantity of education) (Anderson & Walberg, 1974; Haertel, Walberg & Haertel, 1981; Walberg, Welch & Fraser, 1985). The psychosocial environment has been used in research both as criterion variable (dependent variable) and as
independent variable, e.g. when examining the relation between climate and performance (Trickett et al. 1982).

Bronfenbrenner & Ceci (1994) suggest an ecological development model, transformed in a bio-ecological development model, to underline the importance of proximal processes in the immediate environment. The proximal processes are regular, long-lasting interactions with persons, objects, symbols, which have importance for the development of individual potential. They occur first in the family, later at pre-school and school. The processes occur in an immediate environment termed the setting, which is embedded in a larger context defined as culture, social class, ethnicity, historical period.

Studies of interaction between individual prerequisites and learning environments in various contexts have showed that the immediate learning environment is more important for children’s development than the general societal context (Fischbein, 1987).

One interesting hypothesis (Bronfenbrenner & Ceci, p. 578) is that stimulating proximal processes can actualise individual potential, leading to increased competence, but also buffer individual potential, which may develop into dysfunction and difficulties. This effect is believed to be more important for children who live in disorganised and deprived environments.

In a school setting, this means that a good school and class environment, where meaningful and durable interactions with persons, objects and symbols are established, can stimulate the development of positive potentials, and suppress the actualisation of potentials that may lead to difficulties. Bronfenbrenner & Ceci refer mostly to research on the significance of the relations between parents and children. Bronfenbrenner (1998) has also outlined the significance of relations with other children.

Another theme for research has been the relations between teachers and pupils: e.g. teachers’ expectations and their effects as self-fulfilling prophecies (Brophy, 1983; Brophy & Good 1997). Empirical studies show that teachers treat children differently on the basis of their actual and expected performance. Teachers communicate low expectations e.g. through waiting a shorter period when a pupil is to answer a question, giving the answer or giving the question to another child, instead of reformulating the question or giving a clue. Teachers also show low expectations through noting inadequate behaviour, giving more criticism or less praise, not responding to open contributions, showing less interest, seldom giving questions or giving only easy questions, placing children far away, making lower demands, giving unjustified praise and exaggerated
help, rarely having eye contact, giving less attention, seldom accepting the child’s ideas and suggestions, offering simpler and poorer contents, curricula and books.

Pupils’ performance is affected by teachers’ behaviour. Pupils of whom the teacher has high expectations will perform near their potential, while those pupils of whom the teacher has low expectations will perform less well than they would have done with different treatment.

Watzlawik et al. (1967) described interaction as communication and analysed various levels thereof. These theories have inspired studies of the communication between pupils and teachers (Crétan, Wubbels & Hooymayers, 1993) using system communication theory. This approach gives interesting consequences e.g. regarding the definition of problem behaviour. This is not regarded as an individual problem, but as the result of interaction within the group. The formulation of the problem thus becomes more teacher-oriented.

Classroom interactions occur at various levels at the same time: there is a report level (the actual open message, what is said) and a command level (the relational message) containing a power aspect: how the message is said, inexplicit expectations, the competing definitions of the situation. Interaction problems in the classroom may depend on contradictions between contents at the different levels. Through avoiding hidden messages that do not correspond to what is said at report level, and also through metacommunicating (communicating about communication) and increasing awareness of the hidden power aspect of communication, the interactions can change for the better and energies may be directed to more effective work.

Wubbels, et al. (1993) focused on the interaction between teachers and pupils and contributed to the research on teachers’ styles on the basis of estimation of pupils. The teacher styles identified are: authoritative, tolerant, uncertain, repressive and drudging. Certain types of teachers do not stimulate kind relations between students and do not strive for a good work climate. Pupils’ estimations of classroom climate were more realistic than teachers’.

In the same project, another study looked at the relations between pupil performance and attitudes and teachers’ leader styles (Brekelmans, Wubbels & Levy, 1993). Teachers with behaviour characterised by directivity, leadership, helpfulness and friendliness had students with higher achievement. Low student achievement correlated with teacher behaviour experienced as uncertain and unsatisfactory. These teachers also appear to give students more responsibility and freedom. Teachers
who are perceived by students as dominant and helpful are using effective methods and their pupils show higher achievement.

What happens in the classroom is not always connected with the official learning function, but hidden aspects and functions that have been called the hidden curriculum (Jackson, 1968; Broady, 1981) influence daily school activities. The hidden curriculum may be unconscious and unofficial selection and socialisation processes going on at school alongside the visible official function. This concept indicates that it is the school’s own structure, organisation, hierarchy of power, values that are conveyed to pupils as contents, independently of other contents that the school intends to transmit. The concept has been used in critical analysis of educational settings and of the hidden and unintentional contents transmitted by the educational organisation, structure and communication. Other scholars have pointed out that these hidden aspects may be used intentionally as pedagogical tools to transmit values and attitudes, e.g. democratic values (Freiberg, 1999, Chiari, 1997), as already noticed by Dewey (Hlebowitsh, 1994).

Göransson’s dissertation (1995) is based on observations of interactions between teachers and pupils in 24 special units. Interactions between pupils were infrequent in these special units; moreover, when they did exist they were brief. The teacher encouraged interaction with him/herself rather than among children. The results indicate that rich interaction among children with mild cognitive disability was not established without an intentional strategy by the teacher, and also that this goal is often not operative in many classes. Göransson draws more general conclusions that are valid not only for special units:

(...) (It is) significant that teaching is adapted not only to pupils at different stages of development, but also partly changes its direction: the pupils’ interaction with their coevals, their friendships, ability to handle conflicts and similar matters should receive priority for their own sakes in teaching, and not as at present be a matter chiefly for break and pupils’ free time (p. 237).

Gunnarson’s dissertation (1995) is based on interviews with children and gives a picture of how pupils in skoldaghem (special schools for children with school difficulties e.g. behaviour problems) perceive their school situation. The pupils belonged to two groups: one satisfied with the opportunities for nearness /intimacy, the other dissatisfied with the lower achievement that teachers expected. Two needs appeared: a learning achievement need and a relationship need.
Arfwedson (1998) describes studies of school codes (Arfwedson & Lundman, 1984) showing correspondence between the school work environment (e.g. expressed in teachers’ ways of receiving new colleagues) and traditions or mentality in the social context. One result was that the individual differences between teachers were not relevant for explaining differences between schools. The differences were, rather, structural and depend also on the local school context.

It is important to illustrate how structures give stability to an organisational function, and how habits and traditional cultures influence school routine. These aspects can contribute to understanding the difficulties of changing education only through reforms at organisational level without considering the importance of traditions borne by the school staff.

Olle Österberg describes in a pedagogical report (1997) based on conversations with a supervisor, how a teacher can intentionally change a class characterised by conflicts, aggressiveness, exclusion, social distrust, and low interest in learning, into a group where the pupils trust each other and want to learn.

The intentional strategy of the teacher is directed both to changing the relations in the class (from distrust and scorn to trust and respect) and to changing the attitudes towards schoolwork (from superficial and formal to deep and personal). The process of change is difficult and time-consuming, but it highlights the possibilities.

This experience can be examined with the concepts restrictivity/ permissiveness and stimulation/non-stimulation of pupils’ needs (Fischbein, 1997). Initially the educational situation was characterised by a hard climate among pupils (a consequence of permissiveness at relational level) and by a formalised and empty learning situation (no stimulation). Through conscious directivity of the relations among the children (making demands, giving responsibility and feedback, discouraging offensive behaviour) and through stimulation with meaningful contents and subjects, the group climate changed: the children’s behaviour towards each other and their attitudes towards schoolwork improved. The situation thus changed towards an authoritative learning situation and later, into a project-learning process.

This example shows that teachers’ knowledge, experience and choices may be of decisive significance for class functioning and children learning, in the proximal processes going on in the group. It also shows how a teacher can intervene in group interactions to create an environment
where the children work in a meaningful and respectful way with school contents.

In conclusion, studies of class climate show that each pupil is influenced by the climate in the class, which affects learning results. The teacher as group leader influences the group. Through activities, contents, organisation and communication of expectations, teachers may influence the social climate towards more trust, respect, creativity and commitment, or distrust, aggressiveness, destructiveness or indifference. The teacher contributes to the children’s roles by communicating even unconsciously different expectations. Pupils’ and teachers’ actions and utterances also have symbolic meanings and power aspects.

Implications for special education are that it is important to note and analyse the social settings where a problem manifests itself, instead of focusing only on individual characteristics. On the other hand, this also signifies that climate and group processes are powerful means to change problematic situations.

### 3.4.3. Educational systems as organisations

According to Talcott Parsons’ analysis of the educational system in the USA (1959), comprehensive school has two main functions: *socialisation* and *selection*.

Socialisation means that a society transmits its values and encourages the behaviour that corresponds to those values. At the same time there is a need to select people for various social roles, so that each person fills the right place in society and so that all the places/roles in society are filled.

School, and specifically the class group, is not the only agency for socialisation. Others are the family, the informal peer group, other voluntary organisations and the workplace.

Parsons (op. cit.) describes various kinds of ability that are acquired through socialisation: children acquire common values and social abilities, but also a willingness to take a role in the specialised structure of society.

Education is based on achievement, and this contributes to the transmission of a habit of achievement that is positive for society. Achievement also produces a differentiation in the group. This can be used in the interest of society, to make a “selection and distribution of human resources in relation to the system of adults’ roles”.

Parsons means that these processes are – mainly – functional and rational. Differentiation on the basis of achievement may however produce conflicts and difficulties. Working with *common values* counteracts these
conflicts and integrates the group. Other interventions may be necessary
to show that *selection and differentiation are not the only goals of education*,
for instance encouraging solidarity and friendship between
children performing at different levels. Even though Parsons has been
criticised for his functionalist view of education, he was also aware that the
different goals of education were sometimes in conflict with each other.

The French sociologist Emile Durkheim pinpointed the idea of the *socialisation*
function of education (1911/1997). He regarded education as
the means for society to engender in new generations the necessary
conditions (attitudes, values, knowledge) for its own existence. Education
is therefore a systematic process of socialisation. Durkheim also showed
how this process is necessary for transmitting norms and values that can
only be acquired through social interaction, forcing people to abandon
egocentricity, to consider interests not their own and subordinate their
own goals to common, general ones.

Other sociologists have suggested that the processes of selection are
not so rational as they appear to be, since certain groups are systematically
discriminated at school and in society and tend not to be represented in
maintains that we cannot consider school as a factor of *social mobility*,
when the evidence suggests that it is a factor of social conservation.
School primarily legitimises existing social differences, by confirming
/reinforcing the cultural capital, the social and cultural abilities that are
regarded as natural. Transmitted by the family, this cultural capital is
responsible for the differences arising in the meeting with school and
education, and is an important factor for explaining future school results.
Bourdieu (op. cit.) states that *formal equality* in school is actually unjust:
an educational system that, in its contents, methods and examination
criteria, ignores the cultural *differences* that exist among children tends to
*reinforce* the differences that existed from start. A school that treats all
children alike, with the same rights and duties, even though they are
different, is thus acting unjustly. School needs to do but little to
discriminate: it is enough to ignore the existing social and cultural
differences and not take their meanings into account (Bourdieu, op. cit.). A
*laissez faire* attitude in school, which also implies ignoring, contributes to
discrimination of pupils considered different, e.g. from families without
educational traditions.

Michel Foucault used the concept of formal equality. According to him,
modern institutions are based on this principle, which implies that all are
considered formally equal. Within such institutions priority is given to
general interests, regulations and standards, with limited consideration of individual specificity. These aspects, existing in modern institutions, are components of a totalising power (Foucault, 1982b). At the same time, there is an individualising power. This expresses itself when categorising individuals by virtue of administrative or scientific knowledge. The categorisation may imply limitations, may be perceived as a reduction, and may be used to separate and exclude from participation in communion with others. Foucault calls both the totalising power and the individualising power pastoral power (op.cit.). It works against individual expression, and strives for homogeneity, while it forces individuals to categorise their own identity. Totalising power does not take account of the specific identity of oneself, since it is grounded in an abstract, general idea of totality. The subject is then constrained by an identity attributed through administrative processes, defining him or her in bureaucratic categories. At the same time as they incorporate the subject in a category, they exclude him or her from the totality.

Randall Collins, Professor of Sociology, (1971) described how the tendency towards longer educational programmes, can be understood as a result of conflict between social groups seeking exclusive and attractive positions. Collins questions the technical-functionalist idea of a rational correspondence or congruence between the length and contents of a formal education and future employment. He also questions whether the function of selection to different organisations and roles is in fact primarily governed by formal education. The primary selection factor, in Collins’ analysis of American society, is not formal education, but the appurtenances of certain groups. Technical competence is merely a secondary element. A certain educational qualification, however, can be considered as a signal that a person belongs to a certain group. Were the selection process only rational and technical, different social groups would be represented within the elite. The fact that the financial elite, for example, consisted almost only of white men from the Protestant group reveals, according to Collins, that other selection processes are operating in society than technical ones concerning formal qualifications and education.

Collins was referring first and foremost to broad social strategies for maintaining control of privileged positions. Other selection processes may also operate at school, even if they are not a part of the technical formal education process. The concept of a hidden curriculum presented above may be useful for understanding the selection that operates for instance when teachers’ behaviour conveys their low expectations to some children (Brophy & Good, 1997). Other aspects of school organisation and
power structure can convey a socialisation content that is not necessarily congruent with declared intentions regarding socialisation. These aspects affect and interact with the function of selection, rendering it less neutral and rational than it is supposed to be.

For instance, the sorting of pupils into different groups on the basis of performance may convey to them a socialisation message about what qualities are appreciated and also about a hierarchy of values, even if the school’s intention is primarily to organise work in a rational and effective manner.

Henry Mintzberg, Professor of Management Studies, analyses different types of power within and around organisations (1983) giving further conceptual tools for analysing schools as organisations. Mintzberg describes ideal types of organisation, termed configurations, and their typical features in a series of aspects. Since the configurations presented are ideal types, a real organisation may be a combination of several types. These models or configurations may be used to analyse goals and decision processes within organisations.

Mintzberg describes different kinds of goals within organisations. Goals representing the overall function of an organisation are called mission goals. Although these represent the real purpose of that organisation, they do not always govern the organisation. They can in fact be overridden by other goals that inspire decisions important for the organisation. What governs the organisation cannot be understood on the basis of official declarations, intentions or policy documents, but must be understood on the basis of actual decisions taken in the organisation.

The mission is a specific goal unique for the organisation (e.g. the care of patients in a hospital, the production of cars for the motor industry). Other types of goal are not specific, but exist to some extent in all organisations: they are system goals, survival, control, efficiency and growth. Sometimes one or more of the system goals can predominate. An attainment of these goals may be so exclusive as to counteract attainment of other important goals. Mintzberg shows that organisations have to work for, and to balance, different and sometimes contrasting goals.

The non-specific and apparently neutral goal of efficiency may be allowed to dominate over other specific goals, pushing them into the background. Efficiency is not an ethically perfectly neutral goal, as it appears to be, Mintzberg warns. Efficiency is in fact connected with an economic system of values. When the system goal of efficiency in a hospital is allowed to override the mission goal of e.g. patient security and health, the economic system of values is allowed to outweigh the humanist
system of values. Efficiency is perceived as only rational and neutral, in contraposition to ethical considerations, which may be suspected of being partial or biased by other interests. Mintzberg shows that efficiency too bears an *ethics*: the contraposition between reason and ethics is thus only fictitious. What happens when putting efficiency before the social mission of an organisation is that an “economic morality” may generate “social immorality”.

Mintzberg analyses types of power operating in and around organisations and the possibilities for employees regarding managerial decisions: they may comment, formulate their views, suggest alternatives (voice), or they can show loyalty and conform/adjust (loyalty) or they can leave the organisation (exit).

Thomas Skrtic used several of Mintzberg’s concepts in his analysis of special education in USA (1997). In particular, Skrtic used the concept of mechanical and professional bureaucracy.

The public administration consider school as a *mechanical bureaucracy*, doing routine tasks that can be controlled with regulations and laws, with limited opportunities of using discretion and professional knowledge. Teachers on the other hand see themselves as professionals that can and would make autonomous judgements. They act as members of a *professional bureaucracy*. This may explain, Skrtic claims, why reforms often fail to produce changes in school. Teachers adjust only formally to the reforms, with ritualised ceremonies, and keep doing the things they consider necessary.

When school operates as a professional bureaucracy, a tendency may arise to establish special categories among pupils. The special groups would be treated by incessantly new categories of experts (specialisation).

An alternative to the professional or mechanical bureaucracy, Skrtic suggests, is a school organisation adapting to pupils’ unique situations and creating *ad hoc* solutions for different problems on the basis of local conditions, and through staff cooperation with different expert resources. This model or configuration is called *adhocracy* (Mintzberg, Skrtic, op. cit.).

These concepts have been used in analyses of the school situation of children with motor disabilities (Heimdahl Mattson, 1998). Eva Heimdahl Mattson describes examples of problem-solving organisations where staff with various competences can cooperate. She also gives examples of traditional institutions staffed by dominant professionals, where the possibilities for pupils to develop and experience autonomy were poor.
Professionals with expert competence in various fields (health care, rehabilitation, education) working with a pupil, may compete with each other: the professionally strongest group may easily prevail and make its own professional goals become central, with those of the other groups less important. In this case e.g. health care or rehabilitation received priority over education and achievement, even though this does not correspond to the will of children and their parents.

The aspects of school organisation described in this section can also be considered as a part of a hidden curriculum. If we assume that the adults in the community and in school are models, and that children and young people learn from what we do more than from what we say, then school organisation, with the goals and values governing it, is also conveyed to the pupils, trickled, dripped to them through the organisation itself.

Teachers’ position/status in the organisation, their real possibilities to influence their work situations, environment and resources also affect the possibilities of pupil influence and classroom democracy. A school operating as a mechanical bureaucracy, where teachers are expected to mainly follow directives and adjust, is a place where it may be difficult to implement democracy and participant influence, because the organisation itself is not a model for these features.

The categorisation and the selection of pupils towards more homogeneous groups correspond to the tendency of professional bureaucracies to increase specialisation. Such tendencies may, however, be perceived as functional in terms of a mechanical and rational principle of increased efficiency.
4. Implementation and method

4.1. Planning the project

The general methodological considerations inspiring the selection of samples, the choice of instruments, data collection and the analysis will be presented in this section, where the relations between these choices and the theoretical basic condition of this study also are considered.

We started with a questionnaire to all the special educators receiving their degrees from the Stockholm Institute of Education in 1991 and 1992. The Special Educator programme was introduced in 1990 to replace Special Teacher training. The new programme was longer, included sections on investigation methodology and required the writing of an academic essay. The programme was intended as preparation for a more complex role than previously, including supervision, evaluation, investigation, inquiry as well as teaching.

The purpose of the questionnaire was to survey the tasks the special educators had in their schools and the activities they were involved in.

We selected a group of special educators for participation in the project. Several criteria directed the selection. We excluded special educators at secondary levels because they were few, and concentrated on those who were working with children aged 7 to 13, both in regular classes and in special units. We excluded those working in municipalities situated very far from Stockholm, because participation was to require regular meetings.

The selection represented different social and physical environments: different municipalities (big city, middle-sized town, small town, suburban area) and city districts (inner city, residential suburb) school size, type of special educational activity (special units, differentiated groups, support in teacher teams, supervision), sex and age.

We wrote to the group giving information and inviting them to participate. For those who gave positive answers, we contacted their principals for permission to allow the special educators to participate in the research, attend the research meetings, etc. Later, the school heads were given information about the project and were invited to information meetings.

The group of special educators (the research network) selected to participate in the project were called to an information meeting in autumn 1996. The group has since had meetings regularly two or three times at a term to discuss issues related to instruments, results, special education, teaching and learning, also with invited lecturers. The special educators contacted pupils who were participating in any form of special educational
activity, and their parents, and asked if they wanted to participate in this research project. If the answer was positive, we got their addresses. We mailed information to those who were interested and a form to complete and return.

We then collected data on the municipality (education plan, population statistics), schools (school education plan, organisation, planning, leadership). Several questionnaires to parents, teachers and pupils were prepared (Malmgren-Hansen, 1998, Roll Pettersson 1999, Westling Allodi, IV).

The special educators became a reference group in the choice and adaptation of instruments. Many had objections to the use of instruments that could be regarded as tests. They did not want to use instruments that could be too difficult for their pupils, or too different. We adapted the instruments to the special educators’ suggestions.

Each special educator could contact 10 pupils. Most contacted fewer. During 2001, 22 special educators participated (18 women and 4 men). Two did not contacted any pupils. The others brought 122 to the project, mostly from primary schools and special units, who were involved in some special education activity.

Most of the pupils were in grades one to six, with a very few in higher grades. The group showed great variation in level, type of school difficulties and disability (Roll Pettersson, 2001, Westling Allodi V).

The number of pupils varies in the investigations presented here. This is because the instruments were appropriate for children of a certain age, and those who were older or younger could not participate. Some instruments (Self-concept, My class) were collected from the whole class that a child attended, after information to and approval from the parents. The total number of children in these studies is therefore higher, none being excluded from the presentation. The fluctuation in the numbers participating in the various studies depends on age in relation to the instruments, readiness to volunteer or other temporary circumstances.

The requirement of voluntariness made the investigation sensitive to dropout. However, dropout during the project was limited and occurred not because the pupils or their parents no longer wished to participate, but because they pupils moved to another school where there was no special educator or special teacher prepared to participate. The most frequent cause of dropout was when a special educator moved to another workplace or did not continue in the project. In one case, the school head, the parents, and the pupils first agreed to participate but the special educator did not - and the whole group dropped out. In another case, the
special educator moved and the data collection could not continue even though children, parents and head were still interested.

When the special educator moved to another school, we tried to maintain contact with the pupil through a new special educator or special teacher still at the school. For this reason there are two special teachers in the research project. The special educators who moved to another school or job were still able to participate and eventually introduce new pupils to the project.

Special educators often tried to keep in touch with pupils moving to classes with other teacher teams in the same school or to other schools (e.g. secondary).

All the changes in the investigation group required adjustment and solutions that were discussed in the research group and the network.

This thesis focuses on the pupils, and one issue to consider was therefore the variation in the pupil group. I sought to avoid defining the pupils in categories of disability or difficulty, judging that the definitions were not reliable enough. Definitions were not available for all the pupils, were issued by different people responsible in different municipalities where the policy on special educational matters could vary. I therefore took account of the type of educational activity and organisation to which pupil was assigned (e.g. regular class, small group, special unit, special activities). Another way to get a picture of the pupils’ difficulties could be to use the SFO/ABILITIES form (Simeonsson & Roll Pettersson, 1997). This was completed by the teachers or special educators for each pupil, and gave a picture of the pupil’s abilities in different areas.

There was a conflict between the wish to avoid categorisation and the need for relevant information on the type and level of difficulty. This could be relevant when interpreting the data on self-concept, class climate, etc. We therefore used the Abilities Index, which is a rating of different functions, but does not give a diagnosis.

The activities in the network and the negotiation with the special educators affected the implementation of the research. I regard them as adaptation to the investigation group /sample, and also as constraints. The network was a central condition for access to the pupil group, collection of data and motivating the children, parents and teachers to continue in the project.

We also tried, through the network, to bridge the gulf between practice and theory, i.e. between educational practitioners on one side and teacher training and educational research on the other.
4.2. Data collection and instruments

Self-concept (study 1)
In the self-concept study, we used the “This is Me” questionnaire form, an instrument developed and used in Sweden (Taube et al. 1984a, Taube, 1988). “This is Me” was designed according to models used in other countries, and in collaboration with Danish, Norwegian and Swedish psychologists.

The questionnaire consists of 30 items and has a four-level rating scale. It is based on an evaluation of specific components and also gives a global measure of self-concept at school. The components are academic self-concept (16 items on school in general, school work, school subjects), social self-concept (10 items concerning peer relations) and personal self-concept (4 items concerning self-image and parents’ concerns). The instrument therefore measures self-concept in a broad sense.

Self-concept among schoolchildren is considered to be a multidimensional construct, in accordance with other research (Byrne, 1984). Academic and social self-concept are two important components.

The instrument was used in Umeå on a representative sample (690 children in 44 classes) with satisfactory reliability (split half rel. =0.69) (Taube et al. 1984b; Taube, 1988).

Experience of school (study 2)
To get a picture of children’s experience of school we collected texts written by the children on the theme: “Tell us all about your school” The method was described by Jones (1995) who believed that texts on this theme could give a reliable picture of different school situations and of the encounter between school and child. The method could therefore be used to evaluate educational environments. Narrative and sociolinguistic analysis was used to examine the text material.

Functions and conditions of differentiated groups (study 3)
I carried out observations, interviews and informal talks in three differentiated groups: a special-unit class (8 pupils), a cooperation group (10 pupils), and a small group (10 pupils) on one or two occasions for at least four lessons.

I conducted semi-structured interviews with the special educators who were in charge of these groups. The interviews were taped, transcribed and analysed on the basis of the investigation questions. The interviews took between 45 minutes and two hours. The special educators read an early
version of the presentation of the results and confirmed the circumstances and conditions presented.

**Class Climate (studies 4 and 5)**
A questionnaire was developed consisting of 30 items with YES/NO answers, covering the dimensions satisfaction (each dimension with 5 items), friction, cohesiveness, competitiveness, personalisation and differentiation. The Swedish version was developed from two English questionnaires, MC and ICEQ, used in international investigations (Fraser, 1986). The constructs in the questionnaire are based on Moos’ theory (1979) of psychosocial environments. Differentiation was omitted because of low internal validity.

The sample consisted of 710 pupils (680 at primary school, 25 at special units) from 39 classes. Of these pupils, 80 were receiving special support at school. The classes belonged to 16 schools in 9 municipalities.

**Abilities index (study 5)**
The Abilities Index (Simeonsson & Bailey, 1991; Simeonsson & Roll Pettersson, 1997) is a subjective rating scale for children. It provides a profile in 12 areas: vision, audition, limbs (arms, hands and legs), intellectual function, behaviour, social skills, receptive communication, expressive communication, tonicity and health. Each domain is rated with a 6-point scale. A rating of 1 corresponds to normal ability and a rating of 6 to profound disability. The validity and reliability of this instrument have been found satisfactory in previous investigations (Roll-Pettersson, 2001, p. 53).

In study 5 the ratings for the 12 domains are summarised in a comprehensive measure, the disability index. A measure of 12 corresponds to normal abilities in each domain, and a measure of 72 to profound disability in each domain. The pupils’ disability index ranged from 12 (no reduction of ability) to 49.

The disability index score in a class was considered a measure of the presence and disability level of a pupil in that class. More than 40% of the pupils in the class climate study attended classes with a measure of disability corresponding to 12 (i.e. no pupils with reduced ability) and 1.3% attended a class with a disability measure corresponding to 49.

**Social context (study 5)**
Data on income, educational level, occupational level and voting participation from the school recruitment areas are public population statistics from
Statistics Sweden (SCB) presented by the municipalities in reports or at my request. The information often referred to the year 1996. If data for that year was not accessible, data from the nearest year was considered. The data on participation in the municipal election was from 1994, and covered the voters in municipal districts corresponding to the then current school recruitment areas.

General considerations on the instruments

The choice of quantitative and qualitative instruments was based on the interest to describe different aspects of children’s school situation and their experience thereof. This choice is not unusual: in special-education studies the need to combine qualitative and quantitative methods often arise. A combination of methods is also supported in theories on the discipline of special education as a multiparadigmatic and multidisciplinary field.

In a study on communicative competence Wallat & Piazza (1988) exemplify how knowledge from different research fields can be combined in multidisciplinary analysis, to acquire better comprehension of the phenomena being investigated:

(...) multiple perspectives involve (...) recognising similar constructs and overlapping questions across disciplines. These approaches (...) can culminate in a multidiscipline perspective on crucial educational-social questions, one which provides a fuller, richer understanding of a phenomenon than previously obtained within a single setting or a single discipline. (p. 309)

The analysis of different types of data required the use of various methods such as factor analysis, two-level modelling, text analysis, and analysis of observations.

Further, obtaining children’s perspectives with a broad type of data, both standardised (This is me, My class) and open, is important, if one is to avoid a top-down perspective that would imply the risk of objectifying and categorising the children. Bearing in mind how little power children still have – and children with disability /difficulties generally even less – it is important to let them speak and to take their words seriously.

I thanked the children for their contributions and their participation and gave them small presents, to make them feel that their efforts were appreciated and also to emphasize that their contributions were not homework that they had to do.

For each instrument, I prepared information and instruction to the teachers about what they should say to the pupils, so as to ensure that all the pupils
filled the form in similar conditions and got the same instructions. We discussed whether the questionnaires were appropriate for children with learning difficulties in special units or primary schools. Each special educator judged what the questionnaires required in relation to the ability of each pupil. I recommended adjustments when needed. Since many pupils receiving support at school had reading difficulties, I instructed the teacher to read each item aloud and to give each pupil in the class time to answer. The teacher needed to be sure that all the pupils understood the procedure. If answering the questionnaire in this group situation proved too difficult for a pupil, I suggested that the special educator adjusted the situation to that pupil’s need. Consequently, some children answered the questionnaire alone with a teacher. In other cases I presented the questionnaire to one child or a small group. In my judgement and the special educators’ these questionnaires were appropriate for children with learning difficulties at special units, if necessary with the above adjustments.

It is fairly difficult to determine whether the children’s texts give a reliable picture of school from their point of view. The children wrote the texts or in some cases told them to the special educator. Some children may have felt unable to tell what they wanted, and that they exercised some “self-censorship”. The fact that the evaluations of teachers and school heads were positive throughout, when these judgements were made, confirms that this may have been the case for some children.

My conclusion is that the texts did not tell everything. Children made a selection, but they tried in different ways – e.g. indirectly – to express even negative experience. I consider the texts reliable, but perhaps not exhaustive. They give the impression that the children were taking the task seriously and making use of the opportunity to convey their own experience and impressions. Some child may have written little because of difficulties in expression or low motivation, but no text gives the impression of being other than genuine and sincere. The texts give a varied and personal picture of how children experience school.

Because the selection criteria were intended to maximise the variation in the sample, it is probable that the results of the study adequately reflect the variation in school situations for children with special support at school and in special units, in different schools and municipalities. However, it cannot be concluded this sample is representative of pupils and schools in Sweden, except that the results on “This is me” did not differ from those of the control group in Taube et al. (1984 a, b).
Table 1. Overview of sample and methodology in the presented five studies.

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<th>Title</th>
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| 1 183 children (9-13 years)  
77 children with special support  
(25 girls and 52 boys). 55 pupils in regular classes, 15 in special units, 7 in a cooperation class. 106 pupils without support | Factor analysis | Cronbach coefficient alpha for total SC= 0.82  
ASC= 0.71  
SSC= 0.74  
PSC= 0.41 |
| 2 185 children (7-17 years)  
from 38 classes situated in 16 schools  
90 children with special support  
(27 girls and 63 boys)  
95 children without special support from some of the same schools and classes as the pupils with support | Narrative analysis  
Socio-linguistic analysis | Comparison of texts of children from different classes with low and high Climate-index |
| 3 3 differentiated settings situated in 3 municipalities in the County of Stockholm: 1 special units class, 1 cooperation group, 1 small teaching group | Text analysis | Multiple case design  
Multiple sources of evidence  
Key informants' review |
| 4 679 pupils (3-6 grades)  
39 classes in 16 schools in 9 municipalities  
80 pupils with special support | Factor analysis | From 0.67 to 0.79 Alpha reliability (Fraser, 1986)  
Cronbach coefficient alpha for Satisfaction= 0.57  
Friction= 0.63  
Competition= 0.69  
Cohesiveness= 0.70  
Personalisation= 0.42  
Differentiation= 0.42  
Climate index= 0.82 |
| 5 Population in 16 recruitment areas  
38 classes in 16 schools | Confirmatory factor analysis (CFA)  
Structural equation modelling (SEM)  
Two-level modelling | Population based |
| | | |
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| | | |
The results concerning the pupils presented in this investigation cannot be used to make inferences about the Swedish school population. The wide variation makes it probable, though, that relationships, categories and tendencies emerging in the results may be representative for these varied situations, and they can be valid tools for further analysis. The validity of the models and categories emerging from the results needs testing in other investigations and other groups of pupils.

Children in need of support are over-represented in this study. The large variation in the pupil group, even regarding the kind of difficulty experienced in the educational environment is advantageous in a qualitative study, since it increases the probability that more dimensions are noted and become visible.

Since data from various instruments was available from the same group, it was possible to compare the materials to validate the results. For instance, children attending classes with low class climate results also in their texts described problem situations. The texts of children from classes with high class climate results seldom dealt with problem situations. These comparisons support the validity of the results.

Table 1 surveys selection, data collection and data analysis in the different studies.

4.3. Ethical issues

Participation in the present study was voluntary. We informed the participants by letter about the aims of the research and obtained parents and children’s consent to the data collection. The contact persons between the research group and the children were often the special educators at the school. Results and quotations from texts and interviews are described in a way that makes identification impossible. Since the study has primarily a children’s perspective it would have been possible to use case studies of children’s situations and experiences. I decided against this for ethical reasons. My aim was to show the children’s perception of school and learning environments from their perspective, and to avoid describing the children as objects. This means that the study deals more with school in the eyes of children than with children at school.

Considering children as objects has been common both in educational practice (tests, grades) and in educational research. Maybe it is necessary to change perspectives and consider children as competent informants about their school.
The requirement that participation should be voluntary implied precluded description of interesting situations because we lacked access to them: a limitation that we accepted. It is possible that some subjects in problematical situations dropped out from the study. Thus the picture of school that this study presents may be more positive than it would have been had I had access to all the educational situations, with no dropouts.
5. Results

Results of the different studies are presented in relation to the aims of the thesis. For this reason, I focus on relevant results rather than reporting them all. I shall also relate the results and their general implications to the theoretical framework presented earlier.

5.1. Self-concept and experience of school

The findings related to children’s perception of themselves as pupils (self-concept) may be considered as a result at the individual level of the interaction between the child and the learning environment.

Those receiving special support at school did not form a homogeneous group in their perception of themselves and school. While some had a positive concept of themselves and their abilities, others had a negative one. Self-concept varied in this group as much as or more than in the group without support.

Pupils with support at school often had a lower self-concept in relation to school subjects such as reading and spelling. These children had a higher self-concept in relation to friends and peers at school. Friendship and relations can be considered as a field where children experiencing difficulties in school work may seek compensation, in order to maintain a positive self-concept. This may be interpreted to mean that the children seek consolation in their peers. This conflicts with the opinion that classmates are objects of comparison for children who have difficulties, but indicates that relations with other children may be a source of support and consolation.

Children with support could exercise less influence in their classes than those without support. This may indicate that their needs, but also their opinions and proposals, are too little noticed in the educational system. We know that teachers’ low expectations are conveyed in class, e.g. through their lower attention to and willingness to accept proposals from certain pupils. Classroom communication is therefore an area where it is necessary to improve teachers’ awareness.

The group investigated included six models of special support by a special educator: from no special support (only an assistant in the class) to attending a differentiated class at the special units, with an increase of special resources in each model. The amount of support seems positively related to the academic dimension of self-concept, seen in relation to school subjects, performance and achievement. Increased special educational support from an experienced and trained special educator is thus not negative for pupils’ academic self-concept.
This result is interesting, because ‘traditional’ special education has been criticised for contributing to a negative identity. The interventions of special educators seemed not to lead to this effect. We may refer this effect back to the new programme of special educator training, intended to prepare trainees for a new educational role, not only oriented to individual difficulties and more aware of the complexity of the educational situation. This needs to be studied in other groups because of the limited number of pupils and educational situations in the present work.

Concerning children’s perception of school and their experience at school, I again found great variation. Children tend to consider their own experience as central at school. Children with special support are again a heterogeneous group.

In their texts, the children with special support enhance themes such as justice and rights, a dimension of control and an ethical dimension. This indicates that these children feel too little noticed, or sometimes that they are badly treated. Some plead for their rights, argue for the importance of following rules and complain about situations where their experience is not taken into account. Some have to put up with uncomfortable situations, such as a high work pace, activities that are not adapted to their circumstances or physical abilities. Here the children are being forced to adapt and adjust to the learning environment, even if this is uncongenial.

This means that if the perspective of these children is important, it would compel schools to introduce and maintain values that risk becoming invisible or carrying little weight. The presence of children with a different view of life than the average can be considered a resource for realising, in concrete terms, the values of justice, rights and solidarity. These can compensate for other values emphasising self-enhancement: e.g. achievement and competition.

Some pupils with special support may report that school is the best thing they know, while others feel it is completely meaningless. The latter feel useless and bad themselves, since they do not meet any of the requirements expected of them. School can be stimulating and interesting, but also painful and depressing, both enriching and disempowering. These results suggest that the educational system can fill a positive role in the experience of children, but also that some aspects of educational environments can have destructive effects on the child’s life.

The views of children are important to consider, so as to note aspects of school that adults tend to overlook. It is interesting to know for instance that children perceive school mainly as a place for social relations, for meeting other people.
5.2. Psychosocial environment

The psychosocial environment in the groups is described using three factors that differentiated the classes. *Satisfaction* is a factor related to the level of satisfaction and the teachers’ ability to relate to each pupil. *Friction* deals with the occurrence of conflicts and oppression in the group and also with competition. *Cohesion* concerns the level of cohesion in the group, the notion of belonging to a small community.

There was great variation in social climate among the classes. Children are in learning environments with relations of different character. This influences their learning and achievement. Children find themselves in learning environments where their opportunities to develop optimally are very different, and this is not a satisfactory situation in a school system that seeks to be equivalent for all citizens. Disregarding social climate can endanger the equivalence of education.

The social climate was related to other factors in the social context (socio-economic factors) and organisational variables (organisation of special education and heterogeneity in group composition).

Class climate was characterised by more conflict in low-status neighbourhoods (districts with low incomes, low educational levels, low employment rates and low voter rates). Children living in neighbourhoods where many people are disadvantaged become further disadvantaged when they attend a class with more conflict and competition than children living in “better” districts.

The social climate in the classes seems to be an important task to work on, especially in low-status areas. We can also interpret this result to indicate that the current educational organisation is more appropriate for average and good social conditions but inadequate in low status areas. The system should adapt more to local conditions, through e.g. changes in organisation, contents and methods.

If this does not happen, there is a risk that school itself will contribute to a dramatic marginalisation of pupils in these areas. Marginalisation arises not only from family background but also in the poorer learning environment that school offers to children in low-status areas.

Among the organisational aspects, I found a correlation between segregated or differentiated educational settings for “supported” children and conflicts and competition. Moreover, differentiated education settings are also more common in low-status areas.

If differentiation is a way to adapt to pupils’ social background, it is not really effective when we consider that differentiated settings are also related to higher conflict levels. One may wonder whether this strategy is a
real adjustment and not also a form of punishment of or resistance to pupils who fail to fit in, as well as a means to protect children from their peers.

Heterogeneity in the group, defined as the presence of one or more pupils with disability or reduced ability correlated with a social climate of greater cohesion.

If the educational organisation, by accepting children with disability or reduced ability, shows fairness and respect towards them, these actions become living values in its organisation and therefore influence interaction between the children and cohesion in the group.

A higher prevalence of differentiated settings and segregating practices may imply that other values are being conveyed - primarily unintentionally - e.g. that human beings have different worth depending on their performance, that the stronger may oppress the weaker, that there is a hierarchy, or that autonomy and self-sufficiency are necessary requirements, while solidarity is a limitation to individual freedom.

Since there is interaction between general social background factors, the organisation of special education and group heterogeneity it is important that the latter factors are noted when evaluating school practices.

The relations between children in differentiated and regular groups were of various kinds. Oppression, exploitation were reported or observed, but also cooperation, support, solidarity, interest, curiosity, and even celebration when the children got acquainted with each other.

5.3. Schools’ and pupils’ strategies

In schools, boundaries appear as a consequence of contrasting goals.

To resolve the conflict between socialisation and selection and manage the heterogeneity emerging in the group, schools differentiate pupils (compartmentalisation). Achievement and selection are pursued in the regular settings. Solidarity and democratic rights are pursued in the differentiated settings.

This situation is not satisfactory for pupils in differentiated settings, who maybe miss opportunities for optimal achievement, nor for those in the regular settings, missing opportunities to acquire democratic values and attitudes.

The dominance of economic efficiency together with new regulations and their interpretations (new curricula, grades) and the disregard of other primary goals has led to the growing numbers of pupils in special units.

In regular school settings, resistance may be expressed regarding pupils who are perceived as different. Boundaries between regular and differentiated groups, or contents, emerge at various levels.
In the regular classroom, teachers are less directive and pupils are expected to take more responsibility than before. Reduced directivity may contribute to increased difficulties, especially when combined with expected higher performance. The goal of increased pupil influence and responsibility characterising the new curriculum of 1994, can in certain cases be interpreted as reduced teacher responsibility for children’s success. This educational model, sometimes described as laissez-faire, may lead to greater variation in achievement, which of course implies further difficulties for some pupils.

What do “supported” children think of their differentiated or regular group and the support they get there? Many “supported” pupils wanted the support: the differentiated group was a setting where special support was given and many pupils seemed to accept this. Many children in differentiated groups stated that they considered the support positive. Some expected adults to support and protect them. They were satisfied when no offensive /abusive behaviour was offered them and complained when it was. Others wrote of their own experience and suggested adaptation of the learning environment to their situation.

Certain pupils expressed an ambivalence towards the differentiated group: they were aware of its advantages (quieter, better physical environment, more materials and teaching aids, better computer programmes) and they appreciated them; but some also complained of the social disadvantages of being in a differentiated group, e.g. having fewer schoolmates than pupils in regular classes had. Pupils in differentiated settings had poorer opportunities to make friends with the other children.

The differentiated setting may be a means to get support, but it does not necessarily offer a learning situation that is adapted to the special conditions and needs of each member.

Many pupils in regular settings spoke positively of the support they got in the classroom from the teacher or the special educator. For many, school offered the opportunity of stimulating experience. Some pupils complained because they would like more support, but the teacher does not have enough time for all the pupils.

The support given outside the classroom functioned well, according to the pupils, when governed by clear goals, and when it was an attractive, high-status activity, accepted by pupils taking part in it. According to the special educators, some pupils found it difficult to leave their class for special-education activities. Others seemed to accept getting support from teachers or friends.
Many pupils described the difficulties they experienced at school (e.g. concentration, difficult homework, subjects, too much noise). Others avoided these themes and reported only satisfying activities such as playing with friends.

Some pupils also expressed dissatisfaction with what the educational situation offered, a struggle for their own basic rights, and a desire for the educational environment to adapt to their experience, to take them into account (self-advocacy).

Other children and youths showed that they compensate – with other activities and interests – for the unsatisfactory experience and identities that school offers them. Others again seem, instead, susceptible to the school’s negative feedback, feeling inadequate or sometimes worthless. They thus risk being mortified by the difficulties experienced and developing depression.

Where pupils are in a regular setting, the school expresses resistance when it expects them to be “regular”, failing to take their specific experience into account. The concept “a school for all” can thus be interpreted rather restrictively as “a school for all who can adjust” and not inclusively as “a school for each and every one”.

The differentiated setting may be considered as an attempt to adapt to pupil variation; but the logic behind its existence is also problematic, revealing traces of old institutional logic. This is manifested in the tendencies towards increasing specialisation, towards more homogeneous differentiated groups in special units, e.g. groups for autistic pupils only. The very fact that pupils attending special units have limited educational opportunity in the future reveals that the support they receive also has disadvantages, expressing resistance.

The support given may contain elements of overprotection, hampering pupils’ autonomy. Differentiated groups may sometimes stress socialisation goals at the expense of achievement, especially when the educators lack adequate training. If it is so, the children may be under-stimulated, missing the opportunity for optimal development of their potential. This aspect also expresses resistance to diversity in ability.
6. Discussion and implications

6.1. Interactions between children and school

How does school deal with pupils perceived as different and not achieving the required goals? Here I describe alternative models that seem to emerge in these cases. The Education Act (Skollagen) states that children have the right to special support when needed. A school expresses resistance to this regulation when not recognising that the support is necessary or not giving it, or when the support intervention implies that the pupil is excluded from belonging to a community. The support may be given by different means. The school may either acknowledge the pupils’ experience and identities (recognition) or ignore them (ignoring) and even refuse the support requested, or categorise these children.

In regular settings pupils may feel ignored when they are expected to be like everyone else when they are not. In the differentiated setting the difference may be recognised and this may satisfy a basic need. But recognition in the differentiated setting has a price, because it implies that the pupils are defined as belonging to a group of different people and in some way excluded from the community, e.g. from taking part in general education in the future. This may imply a stereotyping and an impoverished identity.

School may adapt to the experience of pupils or require an adjustment on the part of the pupil. School may appreciate the child and his/her way of being or may consider him/her as troublesome, blame parents, consider only the economic costs.

School may accept these children as an evident and natural, obvious part of a community (inclusion), or it may marginalise them. The former means that the competence for working with children with different abilities and experience is spread among many people in the school. The latter, differentiated alternative, corresponds to a concentration of experience and competence in a limited group of experts when specialised groups are established.

In the first alternative we find an integration of values and practice, a correspondence between values and practical decisions. The overall mission goals of school are integrated in the activities and inspire staff action. Where the educational organisation opts for segregation and specialisation, this corresponds to contradictions between intentions or ideals and practical decisions. The goals that rule the organisation are the non-specific system goals, particularly efficiency. School functions are
divided into compartments within the organisation: the *mainstream* (regular) and the *exceptional* (special).

In the inclusive model, heterogeneity is recognised and valued; in the other, homogeneity is an assumption and an aim.

In the first model the activities and contents start with an analysis of the educational situation with the actual children (emergent curriculum), while in the second we can expect curriculum dominance, emphasising standard performance.

Two models (figures 4 and 5) present schematically the aspects of educational interaction at various levels described here.

In the first model (fig. 4) I have structured aspects and effects of interaction in an educational with the ambition to receive and educate each pupil. In the second model (fig. 5) I present aspects inherent in an educational setting that leads to increased differentiation and marginalisation. The models illustrate abstract examples: concrete situations may contain a mix of aspects from the two models.

The first model may be used to identify *facilitators*: goals, attitudes, contents and activities to be developed for improving the participation of a larger group of pupils in educational settings.

The other model may be interesting for analysing what goals, attitudes, contents and activities are *obstacles*, counteracting participation in education.

The models contain an environment dimension, an individual dimension and interaction with the related outcomes, (cf. Fischbein’s model, figure 3). The outcomes of interaction between the individual and the educational setting may be defined as *changes* in the individual and the environmental dimensions. The changes may be described as kinds of adaptation or reaction at an environmental level and as kinds of experience and learning opportunities at an individual level.
Figure 4. Model of aspects of interaction between the individual dimension and the environmental dimension leading to more participation.
6.2. Design and results in relation to the theoretical framework

I now discuss these results and structure the presentation with the interaction models as a basis. I also relate the results to theories and concepts presented earlier.

The contradictions existing in the organisation of special education into differentiated and regular groups may also be recognised at other levels in the school organisation and in society.

After a discussion on the design and the general framework of this study, I consider the issue of individual variation in pupils, prompting group heterogeneity. I then treat educational organisations and activities and general social aspects, to end with considerations regarding individuals involved as teachers, school heads and special educators.
Design and framework

The design of this study can be related to the model of knowledge in special education presented in figure 1 (Skrtic, op. cit) and to the holistic model presented in figure 2 (Kylén, op. cit). These two models have similarities, as I suggested before, but also an important dissimilarity. While the model of Skrtic is a meta-analysis of the status of knowledge in the special educational field, acknowledging and structuring the actual status of the fields, the holistic model of Kylén is not merely an analysis of what exists, but, affirming the importance of interaction, it indicates preferable advances in the field of special education knowledge. In this sense, the holistic model is normative, while the model of Skrtic is descriptive.

Skrtic suggested that different optional choices could be made within the model, depending on the different problems to resolve (pragmatism). The holistic model allows also choices to be made within the model, but it underlines that these choices are also limitations, since they are parts of an interaction process influenced by other aspects, which are not considered at the moment.

The awareness of the limitations of an approach and of the existence of not investigated relationship and interactions may be useful, to avoid the risk of reductionism that is present otherwise in the field of special education, as e.g. Skidmore (1996) and Söder (1999) underlined. The present study sought to avoid the risk of reductionism, combining different approaches.

The micro-subjective, qualitative field of knowledge implies an interpretivist approach that allows subjective perspectives to be considered. It is important to adopt this approach to give voice to those who are concerned, and avoiding the risk of a top-down perspective on the phenomena (study 2). The possible risk of fragmentariness or episodicity of such micro-subjective approach is compensated by the use, both at the micro- and macro-level, also of a more objective approach, with the use of theoretically grounded and empirically verified concepts and constructs (studies 1, 3, 4 and 5). The use of a macro-subjective approach allows an ulterior broadening, giving e.g. a historical perspective on the actual phenomena (section 3 in his framework).

Even the declared intention to avoid dualistic standpoints (Dewey, op. cit.) e.g. between subjective and objective knowledge at a macro level, makes it necessary to consider also historical and ethic aspects.

This kind of broad analysis, implying also a multiparadigmatic approach, are necessary in the field of special education, due to the complexity of the
situations investigated, and when adopting an interactionist, not dualistic approach.

**Support and protection: differentiated, special groups**

The study of differentiated groups showed that they functioned to give pupils support. They often in fact had more staff resources than regular classes, and fewer pupils. The pupils were entitled to various forms of support and facilities (e.g. taxis to school). The opportunity offered by the special group can be regarded as an expression of benevolence, solidarity, and recognition by society of a special need.

At the same time there appeared another function that these groups may have, namely to keep these children away from the regular school setting.

To assist in the support function the groups are furnished with technical aids such as computer programs and other materials, and the classes are smaller. The higher staff ratio, though, is not always advantageous for the pupils: in some cases it leads to fewer interactions between pupils and a poorer development of social abilities (Göransson, 1995).

An analysis by the National Agency for Education (Skolverket, 1999, Dnr 1996:565) of the competence of staff working in special units shows another contradictory circumstance: one-third of the teachers in special units lack adequate teacher training. The assistants have very different training and very few municipalities require training for these persons.

Society admits the need for more competent staff for children with disabilities, but at the same time the administration responsible has not always the power to enforce this. Teachers’ competence is an important factor to guarantee good results, the most important resource in fact, as shown in a study on resources and results in education (Gustafsson & Myrberg, 2002).

These facts indicate that support in the smaller groups is sometimes given by *staff without adequate teacher training*. If this is so, we can suppose that these groups would work more for the pupils’ well being than for their learning.

Pupils in special units have a right to an individual educational plan. According to an investigation of the National Agency for Education (2002) parents of children in special units think that these plans are drawn up only to a limited extent. This indicates that the differentiated groups do not guarantee an educational situation that aims to start from each pupil’s conditions and abilities and to contribute to that pupil’s development and learning with special, unique adaptations. The feeling that the pupils get support and protection through the differentiated groups was strong.
among the staff working in these groups. Many parents whose children attend special units probably share this feeling. Since it seems impossible to change regular education so that it can accept and adapt to all pupils, the differentiated groups have an important function to fill, according to the teachers in these groups.

Placement of children in special groups was often preceded by processes of marginalisation and exclusion from the ordinary educational setting, by the ordinary teachers or by other pupils. The differentiated group seems to afford protection to children perceived as vulnerable, in a hostile or hard and demanding educational environment.

At the same time though, the differentiated group is in itself an institution that answer the need arising in regular groups to “get rid of” pupils who are not expected keep up, or who cannot adapt, or who are merely perceived as different.

There seems to be in the regular educational settings a resistance to pupils who are perceived as different, since these pupils are often placed in the differentiated groups. The parents may be positive to such placement when their children have experienced social difficulties in the regular setting.

It has become more common to place pupils in special units after several years in regular classes (Skolverket, 1999) and this indicates that marginalisation operates within the educational system.

The fact that children perceived as different, regardless of whether they are disabled or not, risk feeling insecure or marginalized in a regular educational setting is a serious problem. It must be an unquestioned right of every child to feel secure in school without being afraid of harassment or discrimination.

The present results and the material from the supervision department of the National Agency for Education show examples where these basic rights are not assured to all children.

Cases of discrimination and assault – where the municipality has been criticised by the Agency – give an impression of inertia on the part of school and municipal officials in identifying, recognising and reacting to incidents occurring. There is also a tendency to minimise matters and make excuses with legalistic hair-splitting. A common strategy is to explain the assault as a single incident and not as a case of bullying. In this case, the school argues, it is not necessary to take measures as provided by the “anti-bullying plan”. In certain cases it seems difficult or impossible to take the part of the pupil who is being harassed and/or considered in this respect as “weak”.
It is understandable that in such situations the differentiated group may offer protection, guaranteeing the personal security not always found in the regular setting. The protection is only needed though because of the resistance, the rejection and hostility in the regular setting. This is a problem still to be solved.

Differentiated groups can thus represent at the same time both support and resistance to those who are considered as different. The resistance is also expressed in the segregation. It is apparently not the pupils’ needs that explain the segregation, but the resistance that may be found in the regular educational setting. The support needed could be given in other models not implying separation and the introduction of boundaries.

_Homogeneity and ignoring: regular groups_

Other models of support than segregated groups can be conceived, but the tendency towards giving support in differentiated groups is strong in Swedish schools at present.

This tendency may stem from the underlying belief that more effective education is carried out in homogeneous groups.

Children’s unique identities and needs tend to be ignored, sometimes negated, in the regular setting. This is more evident for children considered different from the norm, but ignoring the child’s identity affects each child, even those who can adapt successfully. Children wrote in the texts about school that they “couldn’t keep up”, that there was “too much chat and stress” or about uncomfortable experience that they cannot influence. It happened that their needs for an adapted physical and social environment were ignored in regular classes. There are also examples of educational settings that can embrace diversity and variation.

In the differentiated groups the pupils’ different identities may be considered. Pupils in special units are entitled to an individual educational plan, permitting individualisation of the curriculum and an optimal development. Incidentally, according to the parents these plans are not yet being carried out for all special-unit pupils (Skolverket, 2002). The right to an individualised education has however a price: the pupils risk being defined and categorised, e.g. with a diagnosis. The diagnosis may help to increase understanding in the educational setting and prevent destructive interaction. However, it may also become a part of a process of lowered expectations that may influence self-concept and self-efficacy.

A functional diagnosis need not in itself be an attack on dignity; on the contrary it may help school to understand the pupil and adapt the educational situation. Yet the assumption that a more segregated school
placement is the best solution for a pupil may be experienced as such an attack when the diagnosis is issued. And according to Dyson (2000), the most common special education measure is placement in a smaller group. A diagnosis, or placement in a special group, may also in a longer perspective imply a limitation of rights and opportunities.

In two of the groups studied, children were attending special units without the required previous psychoeducational investigation, or a diagnosis, because investigation teams had a long waiting list.

Children were also placed in special units after an investigation that did not corresponded to their observed behaviour and performance, according to the special educator. In some cases the special educator thought the child should attend a regular class.

The supervision database (Skolverkets tillsyn) of the National Agency for Education (NAE) showed that these circumstances occur in other municipalities (cases concerning placement in school form and personal circle for special units). These facts indicate that the investigation is not always accurate, the diagnosis not always necessary for placement in a smaller group and not always sufficient for getting support.

The children were not entitled to certain forms of support on the basis of a diagnosis involving a disability status, e.g. Asperger’s syndrome. The condition for support measures was sometimes not the individual disability, but enrolment in the special units organisation.

The diagnosis can thus be used as an instrument for separating pupils from the ordinary educational setting, instead of as a tool for adapting the educational setting to a pupil’s needs.

The NAE supervision database reports cases where the parents want to avoid placement in a special group – the only offer of school support for a child with e.g. reading difficulties – even though the child then did not get any school support at all. In another case, the parents of a child with a disability chose placement in a regular class for their child and the school offered a timetable with only seven lessons a week of individual teaching. Instead of getting more support the pupil got fewer teaching hours than the others, and it seems that she did not work with the other children at all. I regard these cases as expressions of resistance to the obligation to give support when needed, and to parents’ right to choose.

These cases and examples from the present study show that conflicts may arise between parents and staff or the organisation when opinions differ about the causes of school difficulties and about the best school placement for a child.
Parents sometimes want to avoid the stigma of having their children in small groups. Some believe that their child is more stimulated socially and cognitively by classmates in a regular class (Roll Pettersson, 1999).

The parents of children placed in special units after many years in regular classes pointed out that school could have supported their children, without requiring enrolment in a special unit as a condition (Tideman, 2000).

Cutbacks in school may be considered as a cause of the increase of pupils in special units. The resistance expressed by the school organisation would then have an economic explanation. This factor seems important, but the effects also depend on other circumstances, as I will argue.

Parents’ experience reveals that the resistance also has other motives: school should know, be able to foresee that some pupils would need support, and should in advance make resources available, if the intention is to be a “school for all”. The inevitable conclusion is that school is not seriously planning to be a “school for all”.

Putting the blame for the increase in pupils in special units only on evil forces from outside (municipal administrators, physicians) implies ignorance of the tenacious traditions of segregation, a force operating within the school itself. An analysis of inner processes and decisions is necessary to improve awareness of beliefs and practices leading to more differentiation and segregation. One such practice is the ignoring of pupils’ experience and conditions and of the differences that exist in these respects.

The examples presented show that regular educational settings risk ignoring pupils’ specific conditions. School has difficulties in adapting, distributing resources, considering differences and offering support in ways that do not segregate the pupils. The diagnosis in itself is not a guarantee of adequate support.

**Homogeneity and the distribution of resources**

I found situations where pupils were marginalized from the regular school situation because of their different behaviour, or because of poor interaction between teacher and pupil, or merely because of the pupil’s appearance. Such marginalisation may also be related to the distribution of resources, as I will argue in this section.

The primary school is furnished with economic resources that should suffice for all pupils. A pupil in a special unit costs more than one in a regular setting. Persson’s investigation (1998) shows that at primary schools the special education resources are often distributed equally among the classes, irrespective of the children’s real needs. The extra
support is homogeneous, since it is quite the same for all the classes. It seems to be the teachers’ need of approximately the same support, not the pupil’s right to adequate support, that determines this model. According to Persson, this arrangement strikes at those pupils that most need the support, because they are likely to get too little.

The models for distribution of resources seem to be an important factor underlying the increase in pupils in special units. Unless the resources are related to individual conditions, it becomes difficult to satisfy a need for support arising in one class and exceeding the “ordinary” need for special support. If school nevertheless gives more special resources to that class, this can mean that other classes and pupils will have fewer resources than they would have, if the most support-demanding pupil went to another school. With this system of resource distribution, the whole school may “suffer” for giving good support in an inclusive setting – to which the pupil is entitled under the Education Act. This distribution of resources based on homogeneity penalises schools that retain children who need support, while it confers a resource bonus on schools that refer such children to special units. Referring schools can then use the support resources for children with less serious difficulties. If the allocation of such resources were linked to the pupil it would be more attractive for the school to keep pupils with difficulties and in need of support.

At the same time, similar processes are going on in special units. Since their numbers are increasing, it happens that more homogeneous groups of pupil are created, for instance of pupils with autism, constituting a further level between comprehensive special units (grundsärskoleklass) and training class (träningsklass). These homogeneous groups are being established despite the opinion of teachers and special educators, who consider them harmful for children’s cognitive and social development.

The principle of homogeneity can thus be a powerful factor in both primary schools and special units. Homogeneity can be related to the principle of a rational division of labour, because it seems to allow maximal exploitation of staff’s expert knowledge. A special educator working in a differentiated setting may teach ten children or more. If the same pupils were integrated in regular classes the special educator would probably be able to work with fewer pupils than this. The integrated or inclusive setting also requires more cooperation between teachers and other staff. This may also be considered as a limitation or a burden by the staff. Where special units already exist, it is not immediately expensive to fill a class with more pupils. The special-unit teachers’ work situation, however, may deteriorate quickly if the groups are too large. The increase in pupil
numbers in special units has not been followed by higher recruitment of qualified teachers to these units. Instead, the increase brought about higher exploitation of the labour force.

Heterogeneous, inclusive educational settings – where the children get adequate support – may require more staff than the regular/special model, at least initially. Inclusive settings also require cooperation between teachers, special educators and other professionals. The regular/segregated model may seem advantageous in an organisation having efficiency as its main concern – meaning rational exploitation of staff competence, but forgetting other important goals that school should work towards.

**Dualism or continuity in learning processes?**

A neglected factor in an organisation viewing homogeneity as a good condition for learning at compulsory school is that learning is an active process, taking place in a social context.

If we assume that learning is a mechanical and passive process within the individual, occurring independently of relations with others and of the context, then a more homogeneous setting may appear more appropriate. In this mechanical model it is assumed that pupils learn from teachers: it seems therefore rational that a teacher with a certain competence or experience should teach more pupils with some “similar characteristic”.

In this case though, we ignore the influence and the learning processes that arise through interaction with other children and from the informal learning called, depending on the field, the hidden curriculum or collateral learning (Westling Allodi, 1998).

The view of learning as an active process which is also social and influenced by relations should have far-reaching effects on the subjects and the curriculum in a school striving to be democratic and educate for democracy. A non-dualistic view of knowledge and education would allow variation to be met in educational settings. Teachers’ activity is and should be inspired by knowledge developed in the educational sciences. Included in their professionalism is the obligation to relate to educational theory and choose the best practice, supported by experience and research. I believe that most teachers do not support the dualistic and mechanical view of learning described here. Rather, it is the organisation they work in that seems implicitly based on this view, with its regular/special dualism and its penchant for homogeneity.

Contradictions may then arise between teachers’ professional knowledge regarding best practices and the educational models enforced administratively in the organisation for pursuing other goals such as
efficiency. Teachers have the professional responsibility for educational activity, but they seem to have limited possibilities to influence educational organisation (see also Malmgren Hansen, 2002).

Psychosocial climate

At class level, besides the group composition, the availability of special support and the underlying learning assumptions, there are aspects related to psychosocial climate or environment.

The psychosocial climate is often noted in negative terms, when focusing on negative group processes called *bullying*. If it is positive to consider these psychosocial aspects, insistence on the concept of bullying also has unintentional negative effects. The use of a special term may, paradoxically, conduce to more indulgence and tolerance than is allowed to actions reported in more general terms such as assault, abuse, defamation, calumny, persecution, harassment. These terms sound more serious and concrete than the diffuse *bullying*.

Processes and actions implying that some pupils feel marginalised, are excluded from fellowship or are harassed may arise in groups, but they are not necessary and inevitable, they can be counteracted and the group can be influenced. Bullying is often presented as depending foremost on other children, but children more often feel that it is teachers who bully them (Skolverket 2001).

Teachers often have a particular responsibility, since their behaviour is a model for pupils. The study of class climate shows that pupils in the same class have different perceptions of their teachers’ behaviour towards them. If this means that the teachers treat their pupils differently, this could be a reason for marginalisation of some pupils. The low expectations of a pupil conveyed by the teacher affects not only this pupil’s self-concept, but also his/her popularity and status among other pupils. High expectation may contribute conversely to high status. It is the teacher who may enforce fairness in the group, by being a model of respectful behaviour towards all pupils, and defending those who may be perceived as vulnerable. Several pupils in this study expected the teachers to make pupils follow rules, or to support them when they risked being harassed.

The teacher’s low expectations may contribute to giving the role of a scapegoat to a pupil showing e.g. difficult behaviour, but the group may also back up the persecuted child and give support and help, if possible. Adults remember the responsibility they felt for classmates who were maltreated by the teacher (personal communication).
Turning to school level, harassment may arise in groups with unequal power relationships, where there is a clear authority and a hierarchy. A typical example is the military organisation where the harassment takes the name of penalism. These organisations have some aspect of coercion, since attendance is compulsory and it is not allowed e.g. to choose one’s companions freely as in ordinary life. There are also elements of control and maybe oppression: obey orders, adapt to a timetable. A hierarchical organisation may therefore generate frustration. Some of the frustrated may seek compensation in oppressing others. Within such organisations members are expected to fulfil various demands that can generate fear.

These elements are present to some extent in the school organisation and cannot be eliminated completely: school has to be organised with a timetable of some kind, school has to expect some performance by the pupils, etc. Analysing these elements (timetable, marks, standard performance), toning down their impact and introducing powerful counterweights in the school organisation, may however improve school social climate.

A curriculum taking account of children’s experience, backgrounds and history and fostering meaningful experience in the children’s lives, with space for creativity and communication, can make children more satisfied than when schools work predominantly with the reproduction of what is already given and the achievement of what is already established. The resulting curriculum would make great demands on the teachers, however!

The quality and quantity of group interactions are related to the social climate: this is thus also an area to improve if one is to change the social climate.

To diminish fear in performance situations, it is a good idea to develop situations that are stimulating and relatively safe. Positive expectations and self-efficacy (Brophy & Good, 1997, Bandura, 1997) make children perform optimally, i.e. near their potential. Conversely, low expectations and low control and self-efficacy inhibit performance.

Children tend to take upon themselves the responsibility for their performance and to view difficulties experienced at school as a personal failure. This can have a bad affect on their future efforts and thus performance. It may be necessary somehow to prevent the school experience of difficulties and personal failure.

A group with communication and interactions of good quality (proximal processes) can constitute a supporting background to learning processes. Friendship and solidarity may also give support when it is difficult to achieve learning goals.
These conditions require analysis, planning adaptations and strategic work by educators. The democratic leadership I am advocating is very different from the *laissez faire* model. It requires purposeful work, planning and evaluation, and an insistent enforcement of common rules and frameworks, allowing working and learning and defending the more vulnerable group members.

**The goals and functions of school**

*Decentralisation* of the responsibility for compulsory education to the municipality, introduced successively during the 1990s, led to greater differentiation between schools in different municipalities, e.g. regarding costs, resources, teacher/pupil ratios, organisation models and placement in special units. This differentiation can represent a threat to the principle of *educational equivalence*, a principle framed in the Swedish Education Act.

At administrative municipal level, competence and interest in the specific goals and functions of school in society, and the will to assume *long-term* responsibility for education, have not always been present. In many municipalities, the new responsibility for education coincided with a period of cutbacks and demands for rationalisation. The lack of competence for achieving the specific goals, together with the demands for efficiency, may lead to schools being run as any other municipal activity, giving priority to *system goals* such as efficiency, and disregarding the specific *mission* goals of education in society.

The goal of efficiency (best results, lowest costs) seems at first perfectly neutral and impossible to argue against: who wants poor results at high costs? However, when *efficiency* dominates over specific goals, it also enforces in the organisation an *economic* value system (Mintzberg, 1983). These values *can* conflict with the declared humanistic value system that school is expected to transmit.

Social/public organisations such as school and pre-school run strictly on the lines of increased *efficiency*, e.g. larger classes, greater workloads, exploitation of the workforce, increased categorisation and segregation of pupils, are not really *effective* in the long run either for the staff, the children or the community. Children’s development and learning are indeed long-term goals!

One effect of the dominance of the economic system of values over humanistic values, in organisations such as schools, is that school transmits to the new generations just these very economic values. What children learn in the long run, when those with power and responsibility over
schools do not really care enough about their circumstances, is just this: *not to care about others, not to take responsibility for others and the surrounding world.*

The adults in charge in the classroom and in the school organisation are *models*, in a deeper and more essential way than the superficial transmission of information implies. The capacity to take care is the most important capacity to transmit in humanity. Zeal in enforcing efficiency in organisations for education may unintentionally act to compromise the essential transmission of humanistic values.

The general goals of the educational system, to contribute to educating competent, responsible citizens who share the democratic values of our society (socialisation) should have a greater place in the decisions taken within the organisation. These values should not be abstract declarations, but rather concrete operative goals, playing a decisive role in school organisation and leadership. Otherwise, the values that school transmits are in conflict with declared democratic goals.

Economic models loaned from the business world are being applied without reflection to activities with completely different goals. The goal of efficiency should of course be pursued, but within framework that does not contrast with educational *effectivity*, school’s principal functions and tasks. The professional responsibility of school staff should also have importance.

Besides socialisation, the other mission that school has in a modern society is selection (Parsons, 1959) of students/pupils so that they may obtain an education appropriate to their abilities and fill the posts and functions that society will need.

Tools for selection are the marks and the rules for admission to upper secondary school and university. The special units can also be regarded as an instrument for downward selection. Pupils in special units get more resources at compulsory level, but have more limited educational opportunities later on. The special units are intended for pupils who do not reach the goals of compulsory school *because of disabilities*. The increase in pupils in special units, varying between municipalities, and the fact that a proportion of these placements can be questioned, according to analysis and supervision of the National Agency for Education, shows that some administrators may be tempted to forget the “*because of...*” and to consider special units a school form for any children who do not – on their own – reach the standard goals of compulsory education.

The curriculum of 1994 increased the pressure on schools to make all pupils achieve quite ambitious *minimum* goals. A quarter of the pupils do
not achieve the standard goals, and more pupils are enrolled in special units (Skolverket, 2000). The compulsory school has understood and carried out the selection as a jumping bar, where a minimum level is required in order to continue. The goal of being a school for all pupils, then, starting from each child’s experience and abilities, does not get high priority.

Besides school legislation and the curriculum, school has to conform to other policy documents which Sweden has endorsed: the UN Declaration on the Rights of the Child (UN, 1959) the Convention on the Rights of the Child (1989) and the Salamanca Statement on Special Needs Education (UNESCO, 1994). These documents oblige administrators and teachers to assure to all children the opportunity to take part in society, to get a good education, to receive support if needed, and to guarantee that teachers have competence in special needs and inclusion.

Documents from Commissions of Inquiry (e.g. SOU 1998:66, FUNKIS) have underlined the importance of these principles. They should then inspire the decisions taken in school and teacher-training programmes. These, however, seem but loosely coupled to these policy documents, when the decisions taken in school lead to a dramatic increase of pupils in special units, and when in the new teacher-training programmes the obligatory parts on special education are not obvious.

**Principles and ideology underlying separation and segregation**

A historical report of attitudes towards children with disabilities or impairments has shown that both abandoning and care have occurred in the past. Decisions to abandon or to nurture, however, “were, and are, predicated by the perceived needs of the group” (Safford & Safford, 1996, p. 2).

Both resistance/hostility and support/care seem to have occurred in the past, even if the opportunity and later the right for the broad group of people with disability to receive a regular education began to be established in modern societies.

In the analysis of institutions for people with cognitive disabilities, Söder (1978) identified two characteristic ideologies: an optimistic ideology of compassion followed by a pessimistic ideology of separation, aimed to protect the rest of population. These opposite tendencies and ideologies may live on and affect traditions, attitudes and practices. The tendencies are ambivalent.

The ideology of care – no longer based on compassion, but on rights – is visible in the official sphere in the form of declarations of intent, legal
rights to support, technical aids, etc. Closer investigation, however, reveals signs of neglect and disregard that can be considered as signals of continued resistance, towards those perceived as different. Children have the right to an education that will enhance their optimal development, irrespective of their abilities. This right is not always valid for children with disabilities, judging by what they themselves and their parents say (Heimdahl Mattson, 1998) and also according to analyses and supervisions by the National Agency for Education. What is offered to children with disabilities in special units is often fewer scheduled lessons, inconvenient timetables, teachers that more often than in regular groups lack the teacher training for pupils of their ages; lower expectations and demands, fewer possibilities to influence their education and to make choices (Skolverket, 1999, 2000:2037). What is offered may be more a matter of protection and care than of education and optimal stimulation.

There have been improvements over the years in the possibility for people with disabilities to have a good education, but these achievements can be further improved, emphasising the rights of children to school support (Handikappombudsmannen, 2001).

A “disability status” gives access to resources that express social support, solidarity and acknowledgement of rights. Embedded in the support may exist residues of resistance that need to be detected (Canevaro & Chieregatti, 1999).

Ignoring of children with disabilities in regular settings and exaggerated protection of them in differentiated settings may be considered as two sides of the same coin, called assistencialism by Canevaro & al. (1996). “Assistencialism” is characterised by the same tradition, based on institutional logic rather than on individual rights.

It is opportune to analyse and summarise the underlying assumptions of the belief that it is possible – and desirable – to separate and sort pupils. The principles of a rational division of labour, of specialisation and rational use of resources contribute to the belief that differentiation is advantageous in an organisational short-term perspective. Since the regular settings have difficulties in adapting and tend to ignore special situations, a differentiated setting may be perceived as advantageous for pupils and parents alike, because there the pupil at least can be acknowledged and get some kind of support.

As mentioned earlier the practices of differentiation imply a limited and passive view of learning. The selection-sorting for placement in special units is carried out on the basis of actual or expected performance in the
core subjects. This shows that schools value certain abilities and knowledge more than others. This can be regarded as an expression of dualism.

The ignoring in the regular groups and the categorisation in the segregated corresponds to Foucault’s (1982) description of power in the modern institution. It is a power that totalises and individualises the subject: the institution overlooks the subject and at the same time defines and determines who the person is thereby separating and categorising people.

Institutions need to define, to draw boundaries between people, to categorise, and are reluctant and anxious regarding what is uncertain and indefinite. Zygmunt Bauman (1991b) describes this as expressing a modern reason that cannot accept ambiguity and wishes to define one’s identity in an unequivocal way. What is not homogeneous has to be assimilated or sorted functionally and rationally. He (1991a, 1991b) suggests that these processes occur in the treatment of minorities in modern national states.

We can apply these concepts to other fields. The same ambivalence towards variation, leading to assimilation or categorisation, may be found in the teacher training programmes and the disciplines of Education and Special Education. Elements of special needs or special education were not represented sufficiently in teacher-training programmes in Norway (Haug, 2000) and in Sweden (SOU 1998:66) despite documents and public pronouncements prescribing obligatory courses on this matter. This ambivalence towards special education in the general teacher-training programme is a parallel to what is taking place at school.

The tendency towards assimilation is expressed in the conviction that a good pedagogy is good enough for all pupils and therefore general knowledge about special education is unnecessary. I interpret this standpoint as an idealistic denial of human variation and of possible biological aspects that seem taboo in education. These processes towards increased generalisation take place automatically e.g. with a removal of what is perceived as special issues, exceptional conditions, exceptions from rules, divergences not of interest to the regular teacher.

The tendency towards categorisation and individualisation is expressed when recognising variation as impairments related to specialised knowledge. In this field it is allowed to take account of biological aspects, the body and its functions. This would allow the development of specific knowledge in different areas; and this can be positive and advantageous for the individual. The risk of this area of knowledge is that the impairment may become the most important thing and not the entitled subject
him/herself. The specialisation of competence may also correspond to the trend towards staff professionalisation and exclusive expertise.

It seems necessary to become aware of this schizophrenic attitude in education towards those who are perceived as different and how it influences educational practice. It is, moreover, based on a limited definition of normality, and creates unnecessary boundaries.

Some special educators in this study defined their work in differentiated settings as educationally *avant-garde*, successful with pupils that the regular settings did not “manage”. The same groups could also be defined from the outside as an *arrière-garde*, a conservative element, a troop who deal with those who are wounded on the educational battlefield. The existence of these groups implies that other teachers in the regular settings can continue as before, without considering that current methods or material are not appropriate for all pupils. Therefore, the differentiated groups are also a conservative element in the school organisation.

The same contradictory definitions may be found in the discipline of special education. An internal definition of special education knowledge emphasises the role of critical analysis of educational practice, in order to promote change, prevent marginalisation and exclusion, and favour participation and competence. But we can also consider an external definition, emphasising individual categorisation, in a way that resembles the *arrière-garde* role.

The modern bureaucratic apparatus can work in a rational and functional way towards any goals it chooses. Bauman (1991a) indicates that a modern, functional, obedient organisation was a prerequisite for the enormous proportions of the genocide perpetrated during the Second World War in Europe. Hilberg (1985/1999) analyses the circumstances leading to the near-extermination of Jews in Europe. Other political and bureaucratic processes of successive discrimination and limitation of rights preceded the physical destruction of the Jews. The genocide was performed with a rational application of principles of division of labour and efficiency: the greatest results were to be achieved with the lowest cost, regardless of humanistic values or ethical principles. We must for this reason be vigilant against organisations that take decisions only on the basis of efficiency and yet demand loyalty. Our modern society and its organisations use similar methods and a similar logic: they demand loyalty and counteract the natural emotion of personal responsibility, which they consider unprofessional (Bauman, 1991a).
**Dilemmas in special education and personal responsibility**

Janina Bauman (2000) studied difficult ethical choices in extreme situations. She has described the actions of people in situations of extreme oppression, with minimal possibility of influencing their predicament or escaping from it, in the Polish ghettos under the Nazi regime.

Janina Bauman believes that it is impossible to judge their action morally, because we cannot understand the extreme situations in which it was carried out. We can however try to understand how people may react to extreme ethical dilemmas.

The experience of ethical dilemmas or goal conflicts can be found even in less extreme situations in our private or professional lives. Employment as a special educator, for instance, means that you contribute to distributing resources that may be insufficient, or must choose between equally important goals and needs, or contribute to placement decisions influencing a child’s entire life. The special educator may not be responsible for the extent of the resources, which depends ultimately on administrators elsewhere, but is at least partly responsible for their distribution and has the evidence and direct experience of the negative consequences of the insufficiency. Special educators and other professionals taking decisions on support interventions, or placement in differentiated groups, may thus experience goal conflicts, especially when resources are scarce (Westling Allodi, 2001).

The goals that staff is to pursue can be in mutual conflict, e.g. efficiency vs. participation or the right to adequate support, or their own personal values vs. organisational demands.

The goal conflict may generate frustration. Such conflicts are of course nugatory in comparison with the ghetto examples, since the people involved have much greater scope for action in our society, but they are unpleasant and destructive for the individual and the organisation.

How staff act in such situations also constitutes a model for the pupils and contributes to moving the organisation in the direction of a democratic community or an authoritarian bureaucracy.

I presume that the dramatic increase in placements of pupils in special units, for instance, has generated some conflicts of goals or ethical dilemmas among school staffs. A possible reaction described by Mintzberg (1983), and used by Janina Bauman in her analysis, is to leave the organisation (*exit*). One does not want to bear the responsibility for decisions conflicting with one’s own values and feels that it is impossible to influence decisions in the organisation. An alternative is to conform and
show *loyalty* to authority. A third possibility is to express oneself, to argue and protest (*voice*) and try to change the situation.

This latter standpoint was taken by committed educators such as Janusz Korczak. In the Warsaw ghetto Korczak argued constantly to obtain better conditions for the children under his care (Lifton, 1997). Lorenzo Milani, too, educated and lived by the principle that “each must feel responsibility for all” (Milani, 1966, p. 6).

Their examples show that the standpoint of *voice* in authoritarian organisations and societies can be dangerous, but also successful in a social and long-term perspective, contributing to change. Their courageous fight against injustice and for the rights of children is also a guide to educators wishing to act for the education of competent and responsible citizens.
Notes

1 The attitude to the desire for knowledge was diffuse and hence ambivalent even in Dante. These words are pronounced by Odysseus to persuade his comrades to follow him beyond the limits of the world, the borders of established knowledge. One can suspect Dante’s fascination with Odysseus experimental thirst for knowledge. But Dante makes ambition have tragical consequences for Odysseus and his men, and he also points out that their inquisitiveness leads them to fail in their duties towards their dependants. A conflict thus existed between knowledge and ethics even in Dante’s time.

2 Bourdieu expresses it thus: certain post-modern analyses (...) bring out only the honest-to-goodness, irrational rejection of knowledge (...) masked as a rejection of ‘positivism’ and ‘scientism’ (Bourdieu, 1996, p. 256-57).

3 The web-based supervision database of the National Agency for Education no longer shows on-line the full text of the decisions taken in the cases examined, but these descriptions were still accessible during 2001.
7. References


8. Articles I - V