A COMPARATIVE STUDY OF CONCEPTUALISATIONS AND PRACTICES OF INCLUSION AS AN ASPECT OF SOCIAL JUSTICE IN THREE TEACHER EDUCATION INSTITUTIONS IN CANADA, SOUTH AFRICA AND ZIMBABWE

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By

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Abstract

This study sought to examine understandings and practices of inclusion as social justice in teacher education programmes in three countries: Canada, South Africa and Zimbabwe. While inclusive education has become an issue of increasing importance globally, contemporary research shows that not much attention has been given to the preparation of teachers as a key element in developing inclusive education systems. Recognising that pre-service teacher education is vital to the success and continued development of inclusive educational practice, the purpose of this qualitative study was to better understand the ways in which inclusion is understood and practiced in the field of teacher education.

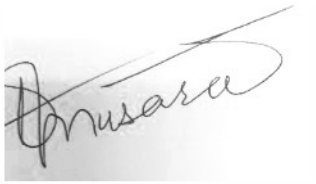
Using Roy Bhaskar's (1978) critical realism as a metatheory and drawing on Fraser's substantive theory of social justice (2008, 2009) and Tronto's ethic of care (1993, 2013), this study explored the extent to which teacher education faculty and teacher candidates understood and practiced inclusion as an aspect of social justice. The data used in this study was generated through individual and focus group interviews and document analysis in three higher education institutions, one in each of the three countries. In Canada, four teacher educators took part in the interviews while five teacher candidates participated in the focus group. Similarly, in South Africa, three teacher educators and eight teacher candidates participated, and in Zimbabwe, four teacher educators and eight teacher candidates took part in the study respectively.

Findings from the study revealed that inclusion still means different things to different people, reflecting contrasting theoretical and ideological orientations from which inclusion is considered, while still remaining a major educational policy concern in all three countries. In the Canadian and South African institutions, inclusion is viewed more in terms of systemic educational change in pursuit of equity, social justice and equal educational opportunities for all learners. In the Zimbabwean institution, the primary focus of inclusion remains creating conditions that make it possible for students with disabilities to overcome barriers to learning and participation by providing specialist educational measures and interventions intended to respond to specific forms of impairment.

As a comparative study, it is hoped that this study will contribute to the knowledge of variations and patterns in the ways in which inclusive education is shaped by societal forces such as political, economic and cultural conditions.

Declaration of originality

I, Ellison Musara the undersigned, hereby declare that the work contained in this thesis is my own original work and has not previously in its entirety or in part been submitted at any university for degree purposes. All ideas and citations used in this study derived from other people are acknowledged and indicated in the list of references as required by Rhodes University.



Ellison Musara **Date: April 2019**

Dedication

I want to dedicate this work firstly, to my mother, Konai. There is no doubt in my mind, Mum, that this is a product of “your two hands”. Secondly to my father Mr. Ndowa, for your vision and commitment to a good education which you never quite experienced yourself. Both of you have amply demonstrated what faith, sheer hard work and resilience can do. From virtually nothing, whole generations have been lifted from the dust. And lastly to my late aunt Mai Julian; you were the first to believe that ultimately, something special would come home.

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All my friends for urging me on, even when the task looked insurmountable. Special mention goes to Lynette Gonzara, Joel Chiutsi, Dr. C. Chikwanda and Dr. T. Nyatsanza. My friend and brother Dr. L. Mabhoyi, we have come a long way. Thank you for leading the way and believing!

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List of Acronyms

CDA	Critical Discourse Analysis
CHE	Council on Higher Education
HIV/AIDS	Human Immunodeficiency Virus
OECD	Organisation for Economic Co-operation and Development
OISE	Ontario Institute for Studies on Education
UNESCO	United Nations Educational, Scientific and Cultural Organization
US	United States of America

CHAPTER ONE: RATIONALE

1.1 Introduction

1.1.1 Personal, academic and professional experience

I strongly believe that my personal, academic and professional experience have combined to influence my choice of inclusion and social justice as the topic for this research. I have taught in high schools in Canada for the last 15 years, where most learners were from multi-ethnic and low-income backgrounds. Prior to that, I had taught in different secondary schools in Zimbabwe for 16 years in total. Over the years I have become reasonably familiar with the issues that dominate educational discourses in a developing country, as well as among low-income communities in a developed country. My real interest in social justice took shape in my later years as a result of my experience with the diverse social locations of learners that included social class, race, religion, sexuality and other marginalised statuses and how these factors impacted student learning and the resultant under-achievement patterns that, sadly and perhaps inevitably, still continue to reflect racial ethnic hierarchies. With each year of experience in my own classrooms, I began to see the consistent patterns, not only of which groups of learners succeeded most, but also which groups were likely to experience the most suspensions and expulsions, which learners struggled with their homework most or came late for class. The patterns of which groups dominated the special education classes and the classes that were university bound, as opposed to college bound, also became clear. When you are in such a situation as I was, these issues cease to be just figures and statistics, but become real lived experiences and challenges that confront you every day in the classroom and challenge your most fundamental beliefs about student learning. As I look back now, I view this stage of my life as the root of my interest in issues of inclusion and social justice in education.

As I engaged in further studies, I came to understand that most educational research on inclusion in Canada and the United States have repeatedly shown that children from marginalised groups, mostly immigrant children and children who come from low income neighbourhoods in the school

system, face huge structural and instructional barriers to learning (Kostogriz & Godley, 2007; Organisation for Economic Co-operation and Development (OECD, 2017). As a result, they are often overrepresented in special needs programmes and they usually dominate the underachieving groups. These patterns have eventually led to equity and inclusion emerging as priority issues in Canadian education. In my personal experience though, to this day, in spite of the persistent political rhetoric and the explicit inclusion goals in educational policy, there has been very little evidence of transformation, especially in terms of teacher practice in the Canadian context. Teachers continue to hold low expectations of non-mainstream learners and those learners whose first language is not English, and the same groups of learners continue to show high dropout rates and underachieve (National Center for Education Statistics, 2018).

But what has particularly gnawed at me over the years as a teacher is the undisguised lack of commitment to inclusion goals on the part of most schools. When curricula continue to predominantly represent a Eurocentric worldview, those who are culturally different are effectively excluded from the educational process and the social advantages that come with success (Portelli, 2013). For example, in the bulk of the curriculum in my school, there is usually a total absence of any meaningful reference to positive black experiences, except for the celebration of Black History Month every February, a voluntary activity which, in my view, often smacks of tokenism and political correctness. The mainstream curriculum makes no attempt to subvert the prejudice and racism held for centuries against black people in North America and beyond. Like other minority groups, their cultural repertoires have been historically silenced, both through the rules of participation that regulate classroom ecologies and the dominant knowledge systems encoded in the curriculum (Jacobs, 2015; Waitoller & Thorius, 2015; Furo, 2018).

Further, the research I did in a Canadian high school for my master's degree also significantly deepened my convictions about the need for equity and inclusion in schools. I focused my research on high school learners for whom English was a second language, most of whom were recent immigrants to Canada (Musara, 2013). My study explored mainstream teachers' attitudes towards, and perceptions of, these learners, who are sometimes rapidly moved from special classes to the different content subject areas. In this regard, most of the existing research has shown that there is a serious disconnect between teacher education programmes and the realities of teaching diverse

learners (Ellerbrock & Cruz, 2014; Yuan, 2017). In addition, most research has also shown that teachers have a deficit mentality when dealing with these minority learners and often construe the differences these learners bring to school (including language and race) as deficits that explain their poor academic performance (Haug, 2016). Further, most teachers are not conscious of issues of power and privilege and how unequal social structures influence teachers, who continue to use instructional models which do not enable non-mainstream learners to build social skills which support academic achievement (Redmond, 2010; Cobb-Roberts, 2011).

My research (Musara, 2013) also confirmed that most teachers, including recently qualified teachers, were ill-prepared for teaching diverse classrooms. All the teachers who were interviewed stated that there had been nothing in their pre-service training or thereafter, that would have helped them to develop awareness of how to accommodate second language learners and learners who were culturally and linguistically diverse (Musara, 2013). Most teachers were generally not aware of the need for inclusion and the importance of social, cultural and historical contexts to students' learning (Cochran-Smith & Villegas, 2015).

Therefore, in my view, despite the huge contextual differences between countries, the reality is that many learners throughout the world's education systems still experience exclusion on the basis of race, social class, gender and other factors and these learners continue to be subjected to lower levels of educational opportunity and quality than others, in spite of the global 'hype' about inclusion. For that reason, I have chosen to explore the ways in which inclusion is understood and practiced at a teacher education level and how aspiring teachers are prepared to enable them to effectively contribute to inclusion and social justice in education in Canada, South Africa and Zimbabwe. In the context of the issues outlined above, I am convinced that this research addresses an issue of increasing global importance. I have chosen to look at education in Zimbabwe not only because I have considerable experience in that education system, but because I still consider Zimbabwe my first home. I am deeply concerned with the plight of the marginalised majority who are caught up in a perpetually deepening economic crisis that has gripped that country and has had an impact on education in profoundly negative ways for almost two decades now. I include Canada as I consider the country to be my new home and I am passionate about its education system, much as I am perturbed by what I consider to be the ineffectiveness of the inclusion agenda. I also

consider this research to be my small contribution to the quest for democratic education and to the struggle for social justice in Canada. I have included South Africa in my project not only because it is the system, I am studying presently but also because, given the enduring impact of its colonial history and apartheid, this country presents a unique and most compelling case in terms of the challenges of educational transformation and social justice discourse.

1.2 Reflexivity and Positionality

As I set upon the task of this study, I fully realised the implications of doing research on a topic about which I hold strong personal views and convictions. The principal challenge I had to deal with was not to allow my personal views about inclusion and social injustice to cloud the real issues that would emerge from the investigation. After so many years of teaching, the effects of my profession, my social location and the way I feel and think about racism and marginalisation cannot be underestimated. For that reason, reflexivity had a vital role to play in this research process.

Reflexivity here refers to awareness that the researcher and the object of study affect each other mutually and continually in the research process (Alvesson & Sköldberg, 2009; Berger, 2015). There is a need for a continuous process of reflection at each point, shifting attention inwards to clarify the taken-for-granted assumptions and 'blind spots' in one's own beliefs that inevitably emerge from one's social and cultural contexts (Alvesson & Sköldberg, 2009). A reflexive approach would make apparent one's 'conceptual baggage', theoretical assumptions and preconceptions and how these affect research decisions, research questions and the actual writing. It is important to always remember that social science is a social phenomenon embedded in a political and ethical context, so what is explored and how it is explored cannot escape either supporting or challenging existing social conditions, therefore favouring certain social interests while disfavouring others (Alvesson & Sköldberg, 2009; Berger, 2015). As Rose (1985) argues, "There is no neutrality. There is only greater or less awareness of one's own biases. And if you do not appreciate the force of what you are leaving out, you are not fully in command of what you are doing" (p. 77). For the above reasons, I tried to maintain a critical self-reflexivity throughout the research process.

My positionality in this research also presented other difficulties. I considered my location in this research to be that of both an insider and outsider. Being an insider in terms of studying one's social group or society has possible ethical implications and may raise concerns about bias which might ultimately impact the trustworthiness of the data gathered (Moen & Green, 2014). I am an insider in this instance not in terms of geographical location, but in terms of sharing both historical and cultural experiences with many South Africans. As a Zimbabwean, my experience of colonial education, followed by the purported post-colonial transformation in my country of origin, has many similarities with the South African experience. On the other hand, I am an outsider in this same context since I have never lived in South Africa, nor have I had any previous involvement with any of its educational institutions. Similarly, I am an insider in Canada because I live and work there and I am a citizen, but I consider myself an outsider culturally. Either way, it was important for me to maintain a sceptical approach (Alvesson & Sköldberg, 2009) throughout the research process in order to reduce personal biases as much as possible, so that I would not replicate pre-held notions about the subject.

1.3 Inclusion: An Overview

1.3.1 Defining inclusion

Although UNESCO (1994) formally adopted the term 'inclusion' in relation to education, the concept of inclusion has retained different understandings in many countries (Norwich, 2014; Hardy & Woodcock, 2015; Mitchell, 2015; Walton, 2017). There are still conceptual difficulties in defining inclusion, and its meaning has taken different forms in different places depending on the situation (Ainscow & Sandill, 2010; Allan, 2014). Most researchers of inclusive education have concluded that the definition of inclusion remains contested and problematic, while others have become outright disillusioned with the lack of clarity and conceptual difficulties of what inclusion means and what inclusive practices might look like (Florian, 2014). Even in jurisdictions where inclusion has been a major part of educational debate, like OECD countries, the understandings of inclusion continue to be varied (Fasting, 2013). The key features of international inclusive education policies examined across these regions indicate the tendency of most countries to view inclusive education as primarily a disability issue (Fasting, 2013). While some of the definitions invariably allude to the education of all students, such definitions are often quickly

contradicted by the practices engaged in to bring about inclusion, such as the identification of individual students for support based on characteristics like the presence of disability (Qvortrup & Qvortrup, 2018). Even in countries normally lauded for their progressive education systems like Finland, inclusion is still used to refer to classroom set-ups that are essentially different forms of special education (Graham & Jahnukainen, 2011).

This "conceptual muddle" (Florian, 2014) has been exacerbated by the increasingly dominant neoliberal discourse of school reform that is designed to apply principles of the marketplace to education. In England for example, there is an explicit official expectation that future teachers should be prepared for inclusive practice in order to deal with diversity (Alexiadou & Essex, 2016), yet at the same time there is an alarming increase in highly differentiated school environments usually characterised by competition between schools and student choices, combined with pressures for high academic standards. As a result, many educators have tended to view this 'accountability' and standards-based reform with apprehension, because its underlying emphasis on competition seems to be in indirect conflict with the moral imperative of inclusion (Florian, 2014).

According to Graham and Slee (2007), the inclusion imperative continues to be troubled by the multiplicity of meanings that lurk within the discourses that surround it. Researchers do not uniformly agree on what really constitutes inclusive practices – with Ainscow (2000) for example, arguing that placing a student with a disability in a regular classroom, but making the student work on separate tasks with an aide, should not be viewed as inclusion. In Queensland, Australia, the practice of placing students with disabilities into mainstream classes is today understood and celebrated as the achievement of an inclusive educational system (Winter & O'Raw, 2010). In some cases, conceptions of inclusion emphasise the celebration of cultural differences through visual representations, as a way to construct teacher education programmes around principles of social justice (Alexiadou & Essex, 2016), deliberately avoiding serious themes like the differential use of resources. Such seemingly cosmetic adjustments to traditional schooling, which clearly avoid fundamental issues like poverty and discrimination, have sometimes been represented as inclusive practice. This is partly why the definition of the concept of inclusion has remained largely elusive.

There have been concerted efforts from scholars and researchers to redefine inclusion (Qvortrup & Qvortrup, 2018). Some inclusive education scholars, such as Mittler (2012), have tried to conceptualise the task of inclusion as being that which focuses on the identification and removal of all barriers to participation in education. Other researchers have proposed social justice issues which, in the context of inclusion, aim at redressing inequalities of power and hierarchical social relations (Ainscow, 2005; Slee, 2006), with a view to "benefitting the least advantaged" groups of students (Bringhouse, 2010, p. 41). Scholars who advocate a broader understanding of inclusion have continued to question all approaches to inclusion which focus only on the 'disabled' or 'special needs' students, while ignoring all the other ways in which participation for any student may be impeded (Ainscow, Booth, & Dyson, 2006). This conceptual shift is increasingly evident in the new emphasis on inclusion being a proactive approach to identify all barriers that all learners encounter and the removal of such barriers and obstacles that lead to the exclusion of some learners (UNESCO, 2012). Shaddock, MacDonald, Hook, Giorcelli and Arthur-Kelly (2009) also suggest that inclusion should imply that when participation becomes an issue for any student, the approach should never be to establish special programmes for the newly identified individual or group, but to expand mainstream thinking, and structures and practices to ensure that all students are accommodated. It does not matter whether such issues of non-participation arise from disability, gender, behaviour, poverty, culture or refugee status. Armstrong and Barton (2007) go even further to argue that inclusion is "fundamentally about issues of human rights, equity, social justice and the struggle for a non-discriminatory society" (p. 6). These conceptualisations show a major shift in the way inclusion has grown to be understood in some contexts.

1.3.2 Teacher preparation

While there has seemingly been a broad international commitment to inclusion in recent years, there has not been equal attention across the globe to preparing teachers as a key element in developing inclusive education systems (Waitoller & Artiles, 2013). In the early years, even those countries with a long tradition of research into inclusive education were not quick to acknowledge pre-service teacher education as vital to the success and continued development of inclusive education. They also failed to realise that how we educate our teachers should be consistent with our aspirations for social justice and inclusion (Gidley, Gary, & Leone, 2010). Just as with earlier inclusion discourse, the vast majority of research work at both the national and comparative

international levels was mainly concerned with disability. Even when the concept of inclusion later broadened to include issues of equity and social justice, the dominant discourse on inclusion, even in the US and many other nations, continued to concentrate on students with disabilities and special needs (Artiles & Kozleski, 2007; Mutua & Swadener, 2011).

In recent years though, inclusive education, in its different meanings, has been firmly established in most jurisdictions and there has been growing international recognition of the essential need to reform teacher education to bring about inclusive practices (UNESCO, 2008; Forlin, 2010). The growing perception of teachers as change agents in reducing educational inequalities has been linked to different research which has shown that teachers are the most significant in-school factor influencing student achievement (OECD, 2005; Hattie, 2009). Many commentators have argued that the role of teacher education in maintaining or changing how different groups of students are treated in school requires examination (Apple, 2001; Barton, 2003; Sleeter, 2008). Slee (2010) has argued that one of the most relevant areas of competence for promoting inclusive practice to be developed in teacher education is student teachers' understanding of how broader social forces influence exclusion and disadvantage. In many countries and regions, it has been pointed out that inadequate teacher education and insufficient resources often impede teachers from developing the appropriate understanding or attitude necessary for inclusive classroom practices (Florian & Linklater, 2010; Forlin & Chambers, 2011; Forlin, Sharma, & Loreman, 2014). In a study by Florian, Young and Rouse (2010) to identify key issues in inclusion to reform teacher education, it was found that preparing teachers for inclusive education has not received sufficient attention from researchers in some countries, with most existing research focusing on professional and technical issues, like how to develop lesson plans, classroom management and assessment practices. One review of teacher education in Scotland, for example, stressed the need to prepare teachers as ''prime agents of educational change'' (Scottish Government, 2011, p. 4) and suggested that among other knowledge and skills, ''all new teachers should be confident in their ability to address underachievement, including the potential effects of social disadvantage'' (p. 36).

While a few studies have raised questions about the roles and effects of different types of training for different types of teachers (Young, 2008; Pugach & Blanton, 2009), there has been very little systematic investigation of what teacher candidates learn from their programmes about inclusion

and inclusive practice in Canada and the United States. Giroux notes that the emphasis in teacher education has been on the development of teaching skills, competencies and dispositions at the expense of understanding the social context of schooling and the moral and political purposes of education (2007). In most jurisdictions, there has been less attention paid to the construction of a robust theoretical framework on social justice, and inclusion is generally under-theorised in education (North, 2008). Thus, although there has been renewed attention to practice-focused teacher education, there has been little emphasis on the specific goals of social justice-oriented teacher education.

1.3.3 Current research

According to Conklin (2015), there is an absence of a strong research base to inform the preparation of novice teacher educators in the US, and there is very little formal preparation to help teacher educators become inclusive educators. This is supported by Goodwin and Kosnik (2013) who found that even the teacher educators who are responsible for training teachers in many American states felt particularly unprepared to implement teacher education pedagogies, especially when the focus is on equity and justice-oriented practice. Research in teacher education for inclusion and social justice has been primarily small scale and qualitative, and therefore is difficult to generalise. Sleeter (2001) argues that the research base on preparing teachers for historically underserved classrooms has been inadequate due to the preponderance of small-scale action research studies and little emphasis on results.

Furthermore, in a study focusing on articulating a framework to guide coursework focused on the pedagogy of teacher education with an emphasis on critical social justice, Conklin (2015) found that there were no materials that reflect multiple cultures and perspectives to represent the richness of the whole human experience. Similarly, Cochran-Smith (2005) also found that there was a dearth of empirical research on diversity in pre-service teacher education in the US, and most of the research on teacher education shows that several multicultural courses that are on offer at different levels use course content that often reinforces stereotypical beliefs about culturally diverse learners. In the same way, most teacher preparation programmes tend to prepare teacher candidates to transmit the dominant culture and knowledge by focussing on technical skills that never examine, contest or transform hegemonic assumptions of difference. In this way, teachers

are taught to reproduce inequalities (Kozleski & Waitoller, 2013), instead of becoming active agents who will transform classrooms into inclusive cultures. One review of literature on teacher education programmes in the US suggests that, historically, teacher education programmes have aimed to address diversity with add-on or piecemeal approaches with very little success, adding a course or two on multicultural education while leaving the rest of the curriculum largely intact (Mills, 2013). Although teachers on such programmes become competent in their subject areas, they lack adequate skills and attitudes that are necessary to successfully teach and manage diverse student populations. Therefore, pedagogical approaches need to be reconceptualised both in terms of curricula and course content, to take into account diverse perceptions.

Measures that are designed to improve educational outcomes for all students through inclusive practice should be directly linked to teachers and the way they are trained. It is not uncommon in the US to find some teacher educators who hold deeply embedded deficit notions about minority groups (Sleeter, 2008), often transmitting such attitudes and dispositions to prospective teacher candidates who in turn, reproduce them in their own classrooms. According to Kach and Mazurek (1992), this situation is usually consistent with teacher education policies that were used to train teachers to be agents of cultural imperialism which, historically, was aimed at destroying other cultural heritages through assimilation.

Several other studies have investigated teachers' concerns about inclusive education (Sleeter, 2008; Soto & Kharem, 2010) and their readiness to teach diverse learners (Villegas & Davis, 2008; Yuan, 2017). The major concern they have found was that most newly-graduated teachers continue to report that they did not possess the essential training competencies to deal with inclusive practice and that pre-service education should place some focus on inclusive practice (Forlin, 2010). Despite the many meanings attached to the term 'inclusion', and the many other contextual factors, there is a consensus that the perception of teachers is that they are not adequately prepared to teach inclusive classrooms (MacBeath, Galton, Steward, MacBeath, & Page, 2006; Gokdere, 2012). In another study on teacher efficacy related to inclusive practice in Canada, it was found that their pre-service preparation did not equip teachers with the necessary skills and knowledge to meet the needs of diverse learning populations (DeSimone & Parer, 2006). Current research further indicates that for inclusive education to succeed, teachers need to feel confident enough to teach diverse student populations and have the knowledge and skills to do so (Jordan, Glenn, & McGhie-

Richmond, 2010; Florian & Black-Hawkins, 2011). Teacher education programmes do need courses that are designed specifically to provide skills and knowledge that beginning teachers will need to succeed (Booth, 2011).

1.3.4 Teacher educators

While pre-service teacher education is vital to the success of inclusive practice, teacher educators remain the pivot of the whole effort. However, an OECD (2010) project found that teacher educators were hardly any better prepared for the challenges of diversity. Many teacher educators themselves have not had the transformative learning experiences necessary to challenge the assumptions underlying existing teacher education programmes (Cochran-Smith, 2005). One of the main reasons why most teachers are underprepared for diversity and social justice is the lack of knowledge, experience, commitment and understanding on the part of faculty members who teach teachers (Garan, Kang, & Fraser, 2014). It is critical that teacher educators develop awareness of how they conceptualise culture and bias, as well as examining the effects of their beliefs and attitudes on teacher candidates because they have such a profound influence on both the teachers they train and the students that will be taught by these teachers (Dee & Jenkin, 2002). Many researchers and educators have also called on teacher educators not only to examine the attitudes of their students towards diversity but also to engage in self-study and internal evaluation to better understand their capacity to infuse diversity issues throughout the curriculum (Sleeter, 2001). Teacher educators, more than anyone else, can confront the knowledge and experiences which prospective teachers bring to their learning and should take advantage of these experiences to engage them in dialogue about culture and inclusion early in the teacher candidates' careers (Gorski, 2012). Because teacher candidates will ultimately become teachers of diverse learners, teacher educators need always to be explicit about diversity as an aspect of teaching and learning. The need to nurture and develop teachers who have the understanding, skills, and contextual awareness to provide quality educational access and outcomes for all students, cannot be overemphasised (Waitoller & Artiles, 2011).

In most countries today, the demands on schools and teachers have become more complex as society expects teachers to deal effectively with students from diverse backgrounds and languages, be sensitive to issues of gender and culture and, at the same time, promote tolerance and social

cohesion (Gorski, 2012). Therefore, it is perhaps more critical than ever before to concentrate our efforts on initial teacher education as a way of ensuring that the new generation of teachers will be well-prepared to ensure successful implementation of policies related to inclusion. An equitable education system requires teachers who are well equipped with the values and beliefs needed to achieve inclusive education, and these values need to be integrated into teacher education. This means that the role of teacher educators is more vital than ever before.

1.4 Purpose of the Study

The purpose of this study, therefore, was to examine the ways in which teacher educators in the three selected higher education institutions, one each from Canada, South Africa and Zimbabwe, understood inclusion and prepared teacher candidates for inclusive practice as an aspect of social justice. The study focused on the way inclusion was understood and enacted in the particular institutional contexts and the individual teacher educators' understandings and enactments of inclusion and social justice in teacher education. The research also examined curriculum and pedagogy in the selected universities to establish the extent to which the teacher education programmes attempted to develop knowledge, skills and dispositions that would enable teacher candidates to teach in ways that enhance inclusion and social justice. The ultimate concern of this study, therefore, was to examine the extent to which teacher education across higher education systems have acknowledged and embraced inclusion to ensure that graduates acquire appropriate knowledge, skills and attitudes that further educational inclusion in the school system.

As a qualitative study, the principal interest was to obtain a deeper understanding of how the different teacher educators conceptualised inclusion and how they enacted the principles of inclusive pedagogy in the different contexts in which they worked. In order to examine conceptions that teacher educators held in relation to inclusion, I conducted interviews with teacher educators in the different teacher education departments in the selected institutions, who were involved in the design and delivery of the teacher education curriculum. Focus group discussions enabled the identification of the teacher candidate participants' views, perceptions, feelings and concerns about inclusion and most importantly, their personal experiences both as students and teachers of students. The study also closely examined the curriculum and other structures and processes that

undergirded the practice of teacher educators in order to understand the social constructions of inclusive education that lay under each institution's practices.

The study was also premised on the belief that the meaning of inclusion is derived from the interactions in which it is formulated and practiced (Winter & O'Raw, 2010). In view of that, documents that described curriculum and pedagogy were scrutinised in order to understand how the different teacher education faculties, their cultures, structures and programmes contributed to the development of teacher candidates whose values and norms supported inclusion. Examining curriculum documents included analysing rationale, goals and objectives, content, learning experiences and evaluations, in order to understand the structures and processes that influenced the teacher educators' understanding of, and practices in relation to inclusive education.

The interviews, it was hoped, would not only uncover the teacher educators' beliefs and experiences, but also the challenges they have encountered in the process of integrating inclusion into their practice, and their understandings of inclusion in relation to teaching and pedagogy.

1.5 Key Research Question

How is inclusion as an aspect of social justice conceptualised and practised in teacher education programmes in three selected institutions in the three countries?

1.5.1 Sub-questions

1. How do teacher educators define inclusion in their different contexts?

2. How is inclusion as an aspect of social justice practised by teacher educators?

3. How is inclusion understood and experienced by teacher candidates in higher education spaces?

1.6 Thesis Roadmap

This thesis is comprised of nine chapters. Chapter One, which is the introduction, answered the question, "What is this thesis about?". It provided the background both in terms of my personal

history and the context that led me to choose this area of study. In addition to articulating the purpose and rationale of this study, it also examined teacher education as a significant context for inclusive education.

Chapter Two focuses on the context of the research. This chapter situates the discussion within the educational policy discourse of all three countries. The study covered three institutions in three different countries – Canada, South Africa and Zimbabwe – each with unique historical trajectories. This section attempts to give a brief historical perspective of how education and teacher education have changed over the years in the different contexts and how this might have some influence on current understandings and interpretations of inclusion.

Chapter Three is devoted to a literature review. The literature review is divided into two major sections; a discussion of different definitions of inclusion and an examination of different perspectives of inclusion and inclusive education. The definitions relate to the wider discourse in the field about how there is no consistent interpretation of inclusion, resulting in the term remaining singularly unclear (Hodkinson & Vickerman, 2009). The second section contrasts the different theories and perspectives of inclusion with each other. The discussion on the perspectives also attempts to examine the development of the inclusion discourse and practice over the years.

Chapter Four deals with the theoretical underpinnings of the study. Firstly, it examines the three main research paradigms commonly used as metatheories in research: positivism, interpretivism and critical realism. The chapter then discusses, at length, critical realism as the metatheory that undergirds this study and the implications of the adoption of this metatheory. This is followed by a discussion of Nancy Fraser's theory of social justice and Joan Tronto's political ethic of care as analytical frameworks.

Chapter Five discusses the different aspects of the research design and places qualitative methodology in a critical realist frame, then examines the different methods of data gathering used in this study, namely individual interviews, focus group interviews and document study. This is followed by a discussion of critical discourse analysis, abduction and retroduction as tools of analysis.

Chapters Six, Seven and Eight focus on the analysis and discussion of data collected from the Canadian, South African and Zimbabwean universities, respectively.

Chapter Nine is the final chapter and its focus is to summarise the findings, making recommendations for further research and then to conclude the study.

CHAPTER TWO: CONTEXT OF STUDY

2.1 Introduction

This research project is a comparative study on conceptualisations and practices of inclusion in Canada, South Africa and Zimbabwe, focusing on an institution of teacher education in each of the three countries. All three countries have complex historical and political backgrounds which it is not in the purview of this study to explore. Nonetheless, this chapter will briefly examine the history of education and teacher education in the three countries with a view to providing a context for the way inclusion or related concepts, have developed in each country. Since issues of social inclusion are always closely linked to the socio-economic situation in a country, I will start each section by briefly providing a broader socio-economic context of each country.

2.2 South Africa - A Socio-economic Context

Statistics South Africa (Stats SA, 2019) estimates the mid-year population of South Africa at 58,78 million. Of this population total, approximately, 80 percent is black, eight percent is white, and the remaining 12 percent comprises the rest of the races including Coloureds and Indians. According to Stats SA, the official unemployment rate stands at twenty nine percent. South Africa's Gross Domestic Product (GDP) for 2018 stood at 366 billion United States dollars, making South Africa an upper-middle-income economy by the World Bank classification, one of only four such countries in Africa (World Bank: South Africa Economic Update, 2018). South Africa has an abundant supply of natural resources that is supported by well-developed financial, legal, communications, energy, and transport sectors, and a stock exchange that is Africa's largest and among the top 20 in the world (OECD Data, 2017). In spite of this standing, unemployment, poverty, and inequality in South Africa remain amongst the highest in the world (OECD Data, 2017). South Africa has been shown to have extremely high levels of inequality by international standards, with its economy often viewed as a dual economy, with twenty five percent of the population living below the poverty line (World Bank, 2018).

As will be discussed in greater detail later in this study, South Africa before 1994, was under repressive authoritarian rule which denied political, social and economic opportunities to the majority of its people by putting in place laws and programmes that almost entirely benefitted the minority white population only (Ntsebeza & Hendricks, 2010). This skewed distribution of opportunities has continued to impact all facets of life in South Africa, particularly in education where educational opportunities and outcomes are heavily skewed against the black majority population (Terreblanche, 2002). This is why any change envisaged in South African education should be viewed in terms of the establishment of a democratic society driven by a human rights discourse entrenched in the constitution of the country (RSA, 1996).

Although South Africa has demonstrated a commitment to developing inclusive education by espousing values of non-discrimination, equity and dignity since 1994 (Andrews, Walton, & Ruksan, 2019), there has been slow progress towards inclusive education and many learners do not receive the support that they require to succeed at school (Geldenhuys & Wevers, 2013).

While the ideals of inclusivity in education are aligned to the wider societal changes associated with the dismantling of apartheid and the recognition of human rights, dignity and equality for all, South Africa has an uphill task of making progress towards inclusive education (Walton, 2018).

2.3 Education in South Africa

The social justice discourse in South African higher education is a recent phenomenon (Mapesela, Hlalele, & Alexander, 2012; Leibowitz & Bozalek, 2015; Walton, 2018). But by virtue of its history, any discussion of education at any level in South Africa cannot escape the pervasive inequalities and injustices of the apartheid era. As Wilson-Strydom (2015) notes, "any consideration of higher education in South Africa must take cognisance of the complex historical legacy, and the fact that the country is emerging from a deeply discriminatory, repressive and socially unjust past" (p. 144). Post-1994, which marked the advent of democratic governance, new policies outlined a fundamentally new vision for education. Because the contexts changed so dramatically, higher education, like all other sectors, had to put in place major changes in order to meet the demands of the new dispensation (Robinson, 2010). To redress the injustices of the past, the education section of the Bill of Rights in the South African Constitution now guaranteed the

right to basic education including basic adult and further education for all learners (RSA, 1996, p. 29). One of the main policy objectives was to build "a post-colonial system that can assist in building a fair, equitable, non-racial, non-sexist and democratic South Africa" (South Africa. Department of Education [MoE], 2001). The structural challenges associated with unemployment, poverty and inequality had stimulated and refocused the thinking of policy makers and citizens. In line with this new thinking, higher education in the post-apartheid era, had to operate in both a postcolonial and a globalising context (Higgs, 2016).

Despite the major structural changes and the formal de-racialisation of the country that occurred in 1994, South Africa remains an intensely racialised society in which issues of race remain at the forefront of social, political and economic attention and the majority of South Africans continue to identify themselves using apartheid-era racial classifications (Seekings, 2008). The *White Paper on Education and Training* (South Africa. DoE, 2001) noted that in spite of the advances made since the advent of democracy, the education system has continued to replicate the divisions of the past. It also noted that the institutional landscape was still reminiscent of apartheid, with disadvantaged institutions, especially those in rural areas of the former Bantustans, in terms of infrastructure and teaching facilities.

Many years later, higher education policies continue to reproduce the same powerfully entrenched structures generated by Apartheid, instead of becoming leaders in the transformation effort (Alasow, 2015). Most education institutions, including institutions of higher learning, still reflect the worst ideological excesses of the apartheid system (Sayed & Soudien, 2005; Badat, 2009). Research shows a large gap between idealised visions of change and the reality of both South African teachers and schools (Mattson & Harley, 2003) and the consequential lack of access by the socially and economically disadvantaged to powerful forms of knowledge. The white schools and institutions which enjoyed generous resources in the past that enabled them to provide its white learners with immensely privileged educational experiences inside and outside the classroom have not changed in any meaningful way (Sayed & Soudien, 2005). The formerly white universities still operate in relatively well-resourced environments and continue to occupy distinctly advantaged positions. In practice, they have held onto their old traditions, and their curricula and social spaces still, for the most part, do not reflect or include the experiences of the formerly marginalised groups (Oswald & Swart, 2011). The present dispensation has made some progress in terms of

transformation in both basic and higher education but on the whole, there has been a disappointing lag in the move towards change and equity (Cooper, 2015).

In the school system, it is clear that the greater presence of black learners and staff has not automatically translated into genuine respect for diversity and meaningful social and educational inclusion (Badat, 2017). Badat (2017) goes further to suggest that the kind of inclusion that has occurred has been of a subordinated nature, typically expecting blacks and other historically marginalised groups including women to accept, integrate and assimilate into the existing structures. Others argue, validly too, that policy frameworks put in place by the post-apartheid government like the 2001 *White Paper on Higher Education*, with all its aspirations of social equity, redress and social justice, has only served to "obfuscate the reality of power and historically entrenched privilege" (Motala, 2006, p. 7). As Higgs (2016) argues, education in South Africa still mirrors education paradigms inherited from former colonial education systems and as a result, the voices of the African indigenous populations are negated.

Thus, despite a constitution that enshrines formal equality and a policy regime that conforms to the best global values, inequalities remain pervasive in South African education, and the configurations of power and opportunity have largely remained unchanged (Engelbrecht, 2013).

2.3.1 Teacher education in South Africa

2.3.1.1 A short history

Prior to democracy in 1994, there were approximately 150 state funded institutions providing teacher education (Parker, 2003). Teacher colleges operated much like high schools with teacher educators who were government employees. There was little expectation that staff engage in research or should be disciplinary experts (Parker & Adler, 2005). Teacher education under Apartheid operated largely as a field of reproduction under the control of the Apartheid state (Parker & Adler, 2005) with possibilities for systematic intellectual growth and development of specialist knowledge and identities severely limited.

By 2001, teacher education had been completely restructured with only 23 publicly funded universities offering teacher education remaining and now responsible for generating purposeful curricula for all teacher education following the Norms and Standards for Educators (NSE), Further Education and Training (FET) and the National Curriculum Statements (NCS).The Department of Education had the statutory responsibility to regulate the developments of new qualifications for teachers under the Employment of Educators Act of 1998 (South Africa. DoE, 1998). Teacher educators were now repositioned as curriculum designers and deliverers and as knowledge producers (Parker & Adler, 2005), responsible for researching, developing and implementing curricula.

Today, South Africa has two major routes into teacher education: A four-year Bachelor of Education (BEd) degree and a one-year Post Graduate Certificate in Education (PGCE) for those who already have a three-year degree. The BEd has become the major vehicle for producing new teachers and it integrates the academic and professional aspects of teaching.

2.3.2 Challenges

In South Africa, "reform demands, exacerbated by the pressure to radically change the apartheid educational order and the punishing time frames for developing and implementing new curricula representing a new democratic order, have produced overwhelming challenges for teacher education and development" (Adler & Reed, 2002, p. 35). The purpose of restructuring the teacher education system was to overcome the legacy of apartheid divisions and inequalities such as the inequitable use of resources and the racial separation of institutions. The post-apartheid government's transformation plans envisioned major modifications to curricula of teacher education programmes to bring about redress and equity, so several policies were developed aimed at the implementation of the transformation plan. Specific legislative and institutional changes have included making all teacher education a national and not a provincial responsibility (Lewin, Samuel, & Sayed, 2003; Parker, 2003; Jansen, 2004). The Norms and Standards for Educators (NSE) was gazetted in 2000 by the Department of Education (South Africa. DoE, 2000), followed by the National Policy Framework for Teacher Education and Development (NPFTED) in 2007 (DoE, 2007). The NSE was replaced by the Minimum Requirements for Teacher Education Qualifications (MRTEQ) policy (Department of Higher Education and Training (DHET), 2011).

Although all these promulgations helped to establish a commonly accepted curriculum for teachers, they did not prescribe for teacher education providers the details, pedagogies and theories they needed to adopt. As a result, all these changes were mainly technical in nature and did not shift in any significant way the broader framework of the teacher education curriculum.

There have been some notable changes though. For example, higher education institutions (HEIs) have been given greater responsibility for teacher education because of post-apartheid transformation initiatives (Walton, 2017). While teachers have the task of undoing the effects of years of apartheid education, they are at the same time contributing to new educational values, skills and practices. In the present reform context, "relations between the HEIs and the state within the field of symbolic control create conditions for academics to be positioned to have an effect on pedagogic discourse independently of the state" (Parker & Adler, 2005, p. 72). Existing policy creates the possibility of producing teachers who can operate productively within the education system, supporting the general regulative discourse of the state while at the same time accessing knowledge bases that become tools for critical awareness and social justice (Parker & Adler, 2005). In this context, it is possible for South African teacher educators to critique universalist views of knowledge which do not adequately account for the knowledge traditions and experiences of marginalised groups.

2.3.3 Legacy

Like other public institutions, teacher education is struggling to shake off the legacy of the racist, patriarchal and authoritarian apartheid social order (Badat, 2009). While classrooms continue to be "deeply divided places where contending histories and rival lived experiences come into the same pedagogical space" (Jansen, 2009, p. 208), it is the white academic staff who continue to dominate academic positions whose experiences and knowledge anchor the system as a whole. A commission appointed by government to investigate continued discrimination at South African universities cited many examples of discrimination involving language use in academic practice, assessment practices and "uncompromising institutional cultures which favour white experiences and marginalise black ones" (South Africa. DoE, 2008, p. 117). As recently as 2015, demonstrations for accelerated transformation by black students and staff calling on historically white institutions to "decolonise" their curricula and dismantle institutional cultures associated

with the maintenance of white privilege (Kamanzi, 2016; Grant, Quinn, & Vorster, 2018) have taken place.

2.3.4 Inclusion

The country's framework for establishing an inclusive education was later defined in greater detail in the *Education White Paper 6* (South Africa. DoE, 2001). The change in South African education was viewed more in terms of the establishment of a democratic society driven by a human rights discourse centred in the constitution (RSA, 1996) and the rise of the international movement towards inclusive education (Engelbrecht, 2006). While the *Education White Paper 6* tended to focus more on access and participation for students with disabilities, it does use a broadened definition of inclusion which addresses barriers to learning and exclusion caused by social structures such as poverty, language differences, inflexible curricula and geographical factors (South Africa. DoE, 2008). While inclusion is still located within the more traditional narrow definition where the emphasis is on disabilities and specialist support, its main thrust is the welcoming of all students to general education schools and classrooms and not segregating students on the basis of ability, ethnic background, gender or socio-economic or socio-cultural characteristics (Engelbrecht, 2013; Ferri, 2015). The focus is on changing the nature and characteristics of school-wide systems as well as classroom practices of teachers so that they can cater for learners with diverse educational needs (Ferri, 2015). An inclusive curriculum requires that the content of curricula in higher education in South Africa be informed by the values and contributions of local communities and should be firmly anchored in the cultural and intellectual environment of that community. Inclusion was also expected to help achieve the country's constitutional values of education as a human right, equality and freedom (RSA, 1996a).While the curricula in formal education contexts is primarily about knowledge, curriculum should also concern itself with empowering educators and learners to gain confidence in their own capabilities and to acquire a sense of pride in their own ways of being in the world (Higgs, 2016). An inclusive curriculum should seek to demonstrate how indigenous African epistemologies can be tapped as a foundational resource for the cultural and socio-educational transformation of Africa, and how these epistemologies can be politically and economically liberating (Higgs, 2016). As Mignolo (2009, p. 3) says, "It is vitally important to decolonise the misconception of the superiority of

Western Eurocentric knowledge in order to debunk the belief that this knowledge is the only viable knowledge when it comes to education".

The current reform climate in South Africa provides a good opportunity for teacher education to provide strong foundations for beginning teachers to develop internal loyalty to inclusion and social justice discourses. In a paper analysing the institutional and policy context of teacher education reform in South Africa, Parker and Adler argue that "despite the apparent increasing pervasiveness of state regulation over teacher education, the current reform context creates space for academics operating within Higher Education Institutions (HEIs) to define and influence official knowledge for teachers and teaching" (2005, p. 61). Unless the spaces that have been identified are exploited to alter the patterns of access for marginalised groups, the transformation process that is supposed to characterise the post-apartheid era will not count for much. Some South African teachers still assume that "the everyday experiences of all learners are the same and thus, are blind to the differential distribution of different forms of experience across different social groups" (Ensor & Galant, 2005, p. 287). Most teacher education curriculums continue to place emphasis on practical knowledge which includes procedural pedagogical knowledge like teaching and assessment strategies, planning techniques and procedural classroom management techniques. There is also emphasis on propositional knowledge which includes conceptual discipline knowledge, sociological and psychological theories of motivation and discipline and subject specific analysis, yet there is very little emphasis on personal knowledge which includes knowledge of self, awareness of others, beliefs about knowledge, reflexivity and confidence (Bertram, 2011). There is a need for teachers not only to learn about inclusive teaching strategies but also to question beliefs, value systems, structures and practice that continue to perpetuate exclusion in South African society (Lunt & Norwich, 2009). Meanwhile, value orientations or ontological beliefs about the world and about the nature of knowledge are deeply ingrained in all teachers and are very difficult to change (Bertram, 2011). There is therefore a need for academics in higher education who are teacher education providers, to construct the criteria for official knowledge for teachers and teaching and to create conditions for the emergence of new productive teacher identities which in turn, can influence the quality and practice of education in the school.

While there were "limited empirically-based studies on the teacher education institutions themselves and their interpretations of teacher education policies and the practices" (Lewin et al., 2003, p. 373) in the early years of the democratic dispensation, there has been a strong focus on inclusion in recent years at higher education level. Current research seems to suggest that there has been a strong focus on inclusion in some South African teacher training universities. There has been considerable teacher education and system reform initiatives towards a more inclusive education in South Africa (Andrews et al., 2019). Over the past 20 years in South Africa, the idea of inclusive education has become well established in the academic and policy domains (Walton, 2018) and many universities offer undergraduate and postgraduate courses in inclusive education (Walton, 2018) and many higher education institutions that train teachers particularly now include courses in inclusive education (Walton & Rusznyak, 2017). There are individual leaders and institutions who have attempted to foster inclusive cultures and have mobilised human, technical and monetary resources to support inclusion (Walton, 2011).

In spite of this progress, there is still an uncertain direction for teacher education courses and educational policies sometimes due to the fact that "the country seems to have adopted an incremental approach to inclusive education, with a very conciliatory attitude to separate special education" (Walton, 2018, p. 862), and the conflation of inclusive education and special education (Panther, 2011; Donohue & Bornman, 2014). In most institutions, teacher education has been found to be inadequate and some programmes have been viewed as disjointed fragments focusing on a deficit-oriented approach to learning difficulties (Engelbrecht, 2013). Walton (2018) concedes that even though inclusive education has become a field of study with many universities offering courses and programmes in it, it is still a field without a clear theoretical foundation and lacks a clear disciplinary base which makes it a very contested and fluid field of knowledge. Furthermore, there are many instances where inclusive education has been "variously dismissed as a meaningless buzzword, or as an unworkable ideal" (Walton, 2018, p. 856). Panther (2011) also noted that, even many years after the publication of *Education White Paper 6* (South Africa. DoE, 2001), there are still significant tensions and contradictions in the ways in which inclusive education is understood and implemented in the teacher education institutions in South Africa. In another article on teaching inclusive education in higher education, Walton also expresses concern that inclusive education in teacher education is still largely under-theorised (Walton, 2018), which

explains why "what is taught as inclusive education varies significantly across institutions, with very different ideas about what counts as legitimate knowledge of, for and about inclusive education" (Walton, 2017, p. 857). While Walton (2017) gives examples of successful inclusive schools, it seems most of this success has been measured in terms of individual schools' outreach and service to their communities beyond their obligation to their learners in the classroom.

In conclusion, there is no doubt that there have been some significant changes in South African teacher education in spite of existing challenges.

2.4 Canada - A Socio-Economic Context

The population of Canada is currently estimated at 37 million people (Statistics Canada, 2019), 4.9 per cent of whom are Canada's indigenous people. The term indigenous is used more broadly to refer to the First Peoples of Canada who have lived in what is now called Canada long before the arrival of the first European settlers. Of the rest of the population, nearly twenty percent of the Canadian population is foreign born (immigrants) and immigration remains the main driver of Canada's population growth, accounting for 80 per cent of all population growth. Although migrants to Canada come from all over the world, the vast majority of non-white immigrants to Canada today are Asians (Statistics Canada, 2016). In Canada immigrants refers to racialised Canadians who are non-whites who have settled in Canada in recent years.

At the end of 2018, Canada's reported GDP was 1.653 trillion USD (Statistics Canada, 2019). This GDP places Canada among some of the world's wealthiest nations in the world by World Bank classifications. Although Canada may be viewed as a progressive nation and a majority of Canadians themselves hold progressive social values, the reality is that poverty is deeply entrenched within Canada (Broadbent Institute, 2013, 2014). For example, in spite of Canada's seeming wealth, one in seven Canadians live in poverty and such people are likely to be racialised Canadians, indigenous or new Canadians (Duong, 2018). It is true that Canada today has put in place many legal protections for victims of discrimination and a constitutional guarantee of equal rights for all people, but serious issues of racial inequality still face indigenous people and racialised communities in Canada (Duong, 2018).

Historically, there has always been discriminatory policies and forms of prejudice against non-white and non-western European immigrants and persistent policies favouring white immigrants in the post WW2 period (Fleras, 2015). While there has been some change, in many ways since the 1970s and beyond as Canada embraced multiculturalism and later on the Charter of Rights and Freedoms in 1982, the indigenous people have faced more systematic inequality and social injustice compared to all other groups (Sunga, 2017). The legacy of colonialism and exploitation for the indigenous people in Canada, which included forced relocation and residential schools, wreaked trauma and damage that has lasted several generations for Canada's indigenous people (Wotherspoon, 2014). The residential schools were part of a strategy of coercive assimilation which meant children were separated from their families and communities to live in boarding schools, schools which were often underfunded and neglected (TRC, 2015b). This is why it is important to go back to earlier processes of social integration that preceded the present discourse of inclusion. In the later years however, the social landmarks that had considerable impact on education, would be the era of assimilation, which was then followed by multiculturalism, which preceded the current inclusion discourse.

2.4.1 Assimilation

The discourse of assimilation is often associated with the approaches to integrating new immigrant populations. In Canadian and US public discourse, assimilation connotes a "process by which society becomes more homogenous through such means as socio-economic interaction, intermarriage, and shared identity and values" (Ziegler-McPherson, 2009, p. 2). This should be understood as distinct from the concept of multiculturalism where the emphasis is on preserving heterogeneity instead of homogeneity.

The arguments for assimilation are usually that it is beneficial for social cohesion and the functioning of society and it is good for the social mobility of immigrants and minorities (Alba & Nee, 2003) and equality. In Canada, research has shown that the majority group's endorsement of assimilation was related to higher prejudice towards immigrants and ethnic minorities, and assimilation could function as a justification for discriminatory behaviour and opposition to policies that benefited minority groups (Verkuyten, 2005; Wolsko, Park, & Judd, 2006; Dovidio, Gaertner, & Saguy, 2007). The assumption of this tradition of assimilation is that the minority

group will, in time, change almost completely in order to assimilate, while the majority culture would remain unchanged and unaffected (Alba & Nee, 2003). This unilinear understanding of social change conceptualises, on the one hand, the mainstream dominant as static and inevitable and, on the other hand, constructs immigrants as passive agents (Iannacci, 2008). The ideology of assimilation underlines the dominant status of the majority group and justifies intergroup hierarchies and social inequality. This enables the majority group members to maintain their dominant position in society. According to Freeman and Freeman (2003) assimilation ultimately involves losing one's primary culture and becoming similar to those of the target culture and often results in loss of the native language and culture. This is the majority-conformity theory of assimilation which assumes that ethnic groups are constantly becoming more like the majority culture.

2.4.2 Assimilation and education

In education, the majority-conformity assimilation orientation has been the focus of the Canadian school system from the beginning. In respect of indigenous peoples, the main focus of colonisation in terms of education, involved assimilation and the erasure of indigenous peoples and culture. According to Ottmann (2009), in the past 200 years, the Canadian government has not only passed laws that relocated and restricted Aboriginal people but, in order to achieve assimilation, they have attempted to systematically destroy their culture, language, traditions and their identity through legislated educational and institutional means. For other racialised groups, "since the turn of the century, Canadianisation has been the central ideological ambition of schoolteachers, social activists, civil servants, public health officials and religious leaders" (Harney, 1998, p. 108). Protestant British-Canadians primarily used public schools as tools for cultural assimilation and secondarily for learning purposes during the first two decades of the 20th century and educators were fundamentally concerned with re-creating foreigners in their own image (Pennacchio, 1986). Immigrant children were more likely to conform and assimilate easily, so education was driven mainly by an Anglo-centric curriculum. Religious education and other patriotic rituals and traditions such as songs, observance of holidays and the pledging of allegiance to the flags and the empire, were intended to accentuate a loyalty towards Canada (Pennacchio, 1986).

2.4.3 Multiculturalism

By definition, multiculturalism refers to "the general place of minorities, programmes designed to foster equality, institutional structures created to provide better social services, and resources extended to ethnic minority organisations" (Vertovec, 1996, p. 222). This cultural pluralism means that every ethnic group has the right to preserve and develop its own culture and values within the Canadian context (Norquay, 1998). Multiculturalism as a policy became official in Canada in 1971, to replace Anglo-centric assimilation with the notion of cultural pluralism. Under this policy, ethnic groups could maintain their unique identities. However, there is a strong view that suggests that in spite of what might look like its noble intentions, multiculturalism focused on superficial aspects of culture and did not address fundamental issues of power relations and the power structures that have an impact on the identities of the different ethnic groups (Manyak, 2002). As a result, it did not bring Canada any closer to inclusion. As McLeod (1975) points out, in spite of multiculturalism, "in classroom after classroom in the province, immigrant children and children whose mother tongue is not English or French are being subjected to continued programmes of Canadianisation based on the concept of and belief in assimilation" (p. 29). Many versions of multicultural education are aimed at recognition of non-dominant oppressed groups, so that students in culturally dominant positions could learn to empathise with oppressed members of society. However, the fact remains that inclusion can only begin to be possible when a two-way form of integration is pursued, where both the minority and majority groups renegotiate who they are in ways that are additive (Pungello & Kurtz-Costes, 2000). Schools and students should therefore develop intercultural knowledge in order to respond affirmatively to an increasingly racial, ethnic, cultural and linguistic diverse society.

2.4.4 Inclusion in Canada

The need for inclusion or other related policies in Canada, arose firstly from concerns about indigenous people who continued to suffer exclusion on every major front (economic, social, political and cultural). This situation was partly because of the legacy of a long-running political system that was explicitly designed to assimilate them and eliminate their culture over the years (Subramanian, 2017). This permanently left unforgivable gaps in Canadian society which have perennially required attention. It is no wonder therefore, that Canada was the first country in the

world to include the rights of persons with physical and mental disabilities in its Charter of Rights and Freedoms in 1982. Other than showing a commitment to developing a system that would support full participation of all Canadians, it signalled the value that Canada attached to equity for all its citizens. Section 15 of the Charter provides "equal protection and equal benefit of the law without discrimination for women, visible minorities, persons with disabilities and gay/lesbian and transgendered groups" (Government of Canada, 1985). It is not surprising then that Canada's Federal Charter understands inclusive education that is more aligned with the principles set forth in the Salamanca Statement (UNESCO, 1994). Furthermore, Canada affirmed its commitment to inclusive education by ratifying the United Nations Conventions on the Rights of Persons with Disabilities (CRPD). The goals of inclusive education as articulated in the CRPD are reflected in all Canadian domestic laws such as the Ontario Human Rights Code and other provincial human rights statutes. Currently, Ontarian inclusive discourse focuses on equity, emphasising that equity is not only achieved by treating students fairly (Policy/Program memorandum No. 119, 2013) but is achieved by challenging "the entrenched systems of power and privilege and constantly working to centre the conversation around the effects of inequity, oppression, racism, xenophobia, transphobia, and other forms of hate and discrimination and remedying the impact of past discrimination" (p. 11). It also includes acknowledging historical and present systemic discrimination against identified groups and aims at removing barriers, eliminating discrimination and remedying the impact of past discrimination.

Unlike South Africa however, in Canada, each province and territory is responsible for its own education and curriculum policy. While it is generally thought that this structure may foster regional policies and curricula that are responsive to the diverse needs of Canadians, it has also stifled the development of a cohesive, comprehensive and national approach to ensuring that inclusion is practiced in all Canadian schools (Timmons & Wagner, 2008). On the other hand, although the government of Canada has no direct jurisdiction over post-secondary institutions, federal legislation has implications for policy and practices within provincial education institutions. In this way, diversity issues are implied through legislation such as the Multiculturalism Act (1988), the Employment and Equity Act (1986) and the Charter of Rights and Freedoms (1985) with each establishing some principles and values for inclusion in Canadian society. For example, the Charter of Rights and Freedoms in Canada (1982) addresses the right to

be free from discrimination based on race, national or ethnic origin, colour, religion, sex, age or mental or physical disability.

Meanwhile there has been some progress in the individual provinces. In the province of Ontario, the government has introduced an Equity and Safe Schools Policy which echoes UNESCO in support of a more inclusive society that welcomes a diversity of learners and the human rights of diverse groups. In addition, the Ontario Ministry of Education put in place Policy/Program Memorandum No. 119, 2009. This policy requires all publicly funded school boards to review or develop, implement and monitor an equity and inclusive education policy. Because of that, inclusive education has become firmly entrenched as a national objective in Ontario.

Despite these developments, current research continues to show that inclusion is not yet evident in teacher practice and learning and the wide range of policy initiatives that have been pronounced, have not resulted in inclusive education (Ontario Institute for Studies on Education (OISE), 2011). For example, Aboriginal learners continue to lag far behind the rest of the population in school achievements (Statistics Canada, 2008). In many jurisdictions, the curriculum and teaching materials have not changed in significant ways to reflect multiple cultures and perspectives and to represent the richness of the whole human experience (Ambe, 2006). Beyond this, many communities remain under-served and learners from low income families have a higher risk of being excluded from the educational system than their affluent counterparts (OISE, 2011). Maines (2001) argues that education in Canada today is mostly influenced by forces of globalisation and the accompanying neoliberal orientations of "the new right". Rather than act as forces of social justice, schools mainly serve the purposes of the dominant culture by helping transfer privilege from generation to generation. For Canadian children living in poverty, test scores are substantially lower on standardised testing and in most schools, these children are far more likely to be identified as 'special needs' learners than their counterparts (Maines, 2001). A study by Kutsyuruba, Klinger and Hussain, (2015) concluded that, despite the introduction of more equitable and inclusive models of multicultural education in Ontario, many schools remain dominant sites for the perpetuation of race, gender, sex and class-based inequalities.

2.4.5 Teacher education

The issue of the rapidly changing school demographic in Canada has continued to bring to the fore the question of linguistic, cultural and racial diversity in the teaching force (Egbo, 2009). According to Statistics Canada (2008), Canada has welcomed approximately 225,000 new immigrants each year since the early 1980's and this constitutes 0.7 per cent of the total population. This transforming demography has created "an environment which places critical demands on teachers to work with cultural and linguistic diversity, and much of the educational scholarship on teacher education in Canada deals with how the programmes attempt to introduce an understanding of racism, diversity and social justice" (Gambhir, Broad, Evans, & Gaskill, 2008, p. 6).

While there is recognition that teachers are key to the successful implementation of inclusion and as such, they are important partners in the change process, until recently, many certification standards in pre-service teacher education did not require courses related to inclusive education (Sokal & Katz, 2015). Generally, the certification standard for teachers does not require any courses in inclusive education or the inclusion of social justice-related topics in teacher education curricula . A more common practice after 2008 across provinces, was for teachers to be required to devote 30 to 60 contact hours of instruction, within Canadian teacher certification programmes, to diversity education which could include second language learners, poverty issues and Aboriginal issues (Sokal & Katz, 2015). In view of this, the need has arisen for a new paradigm in teacher education. Teachers need specific competencies and attitudes to be inclusive teachers. If pre-service teachers do not receive training in inclusive education "we are not challenging their predetermined beliefs and not effectively utilising one of the main change mechanisms by which inclusion can become accepted and enacted by teachers" (Sokal & Katz, 2015, p. 50). In Canada in general, for the most part, there is recognition that teacher education reform involves encouraging pre-service teachers to question societal and institutional structures and practices of power and control and their impact on schooling, education and society. Yet, teacher education institutions have been slow to adapt their courses and most provinces have been very slow to respond to calls for inclusive education (Bunch, 2014).

2.5 Zimbabwe A Socio-Economic Context

Zimbabwe is a former British colony which became independent in 1980. Zimbabwe's history includes a pre-independence legacy of unequal education provision on racial grounds under colonial rule, as well as a more recent politically and economically turbulent history which continues to impact education delivery in new ways (Drury, 2015). The new government inherited an essentially unequal education system that was the legacy of both colonial and later the minority governments, whose policies were designed to maintain separation of the races (Dorsey, 1996; Kanyongo, 2005). Soon after independence and the establishment of a non-racial government, Zimbabwe embarked on a programme of reform which, at that stage, was well-supported by a diversified and a stable economy (Carmody, 2007). Among many other changes, the government also ushered in a socialist philosophy which advocated equitable distribution of resources which saw impressive improvements in health and education. At that point, this gave Zimbabwe a unique status as a country that had overcome a legacy of racial division and had managed to extend social services to the majority of its population (Masaka, 2013). This did not last long though. Many studies suggest that the heavy investments in social development and education that were done in the early years of independence were achieved at the expense of the productive sectors of the economy and the stress on the economy brought about the inevitable slow down (Masaka, 2013). As a result, the country was forced to adopt economic reforms prescribed by the Bretton Woods institutions, the International Monetary Fund (IMF) and the World Bank. According to Brett (2003), the Economic Structural Adjustment Programme (ESAP) prescribed by the IMF and World Bank meant a drastic shift from a planned development strategy to a market-based reform where market forces play a greater role. Predictably, this had disastrous consequences for social services like health and education (Masaka, 2013). The prescription totally undermined the philosophy of a more inclusive and socially just society (Liasidou & Symeou, 2016).

Today, Zimbabwe has an estimated population of 15 million (Zim Stats, 2018), with a GDP of US 31 billion dollars. This makes Zimbabwe one of the lowest income countries in southern Africa with an economy that has remained depressed for decades and a GDP that has fallen well below other comparable southern African countries such as Mozambique, Zambia, Namibia and Botswana (Karanda & Toledano, 2018). This has been attributed partly to the deteriorating political economic situation that has gripped the country since the late 1990's. Zimbabwe's

economy has experienced even more severe challenges since then. According to UN figures, the years 2007-2008 saw the economy reach real crisis proportions with inflation rising to a peak of 231 million per cent in July 2008 and industrial capacity utilisation falling below 10% by January 2009 (United Nations, 2017). Recent studies have estimated that 72 people out of every 100 people live below the poverty datum line and the unemployment rate is close to 90% (World Bank, 2016B). With this situation, the issue of equitable access to quality education for Zimbabwean citizens has escaped public attention (Drury, 2015).

As explained above, the Economic Structural Adjustment Programmes of the early 1990s led to severe budget cuts for the education sector which among others, resulted in the re-introduction of school fees for primary school education (Kanyongo, 2005). In view of the deteriorating economic conditions, school fees and levies of any description severely undermined efforts towards the achievement of equity (Drury, 2015). According to Drury (2015), the persistent economic instability and the degradation in public education has been paralleled by the growth of private schools, ultimately resulting in an acutely inequitable education system which benefits a small minority of wealthy individuals.

2.5.1 Educational policy development

It has been argued that educational policy development in Zimbabwe has been very complex due to different political, historical, sociological and economic factors (Shizha & Kariwo, 2011). As pointed out earlier (see Section 2.5) initially, Zimbabwe experimented with a socialist ideology based on Marxist-Leninist ideas with the main driving principle being "Growth with Equity". According to UNESCO (2003), this principle was adopted so that the government could redress the inherited inequities and imbalances in the access to basic rights such as education. Ten years down the line however, and faced with a faltering economy, the country adopted a World Bank-driven structural adjustment programme as a recovery measure (Masaka, 2013). Both these ideological orientations and contradictions had substantial influence on all national policies, including educational policy. The colonial government had sustained a system of education that was racially biased and unequal in both governance and financing, as well as in terms of the quality it rendered to the different racial groups. This had to be tackled "against the backdrop of an expectant electorate and the entrenched interests of the old order" (Moyo & Modiba, 2013, p. 373).

In addition to introducing free and compulsory primary education, other far reaching measures included the abolition of all forms of racial discrimination in education and the creation of a unitary national education system (Zvobgo, 1999).

ESAP saw the reintroduction of school fees as a cost-cutting measure, which was a direct negation of previously acclaimed universal education and this 'rolling back' directly affected the workers and peasants who were intended to be the main beneficiaries of state subsidised education. This shift notwithstanding, the state's commitment to universal access to education apparently remained. The *Education Act* (1987) and subsequent *Amendments to the Education Act* (2006) were all used to formulate policy which enabled increased access and participation at all levels including Early Childhood (Moyo & Modiba, 2013). In terms of the Act, education was declared a human right and educational policy adopted a rights-based approach whereby all children and adults would get an opportunity to acquire an education. This mass approach to education saw Zimbabwe climbing to the top of the ladder in literacy in Africa (UNESCO, 2015). This success in relation to literacy levels has often been conflated with inclusive education in Zimbabwean educational discourse, whereas recent research tells an altogether different story.

2.5.2 Inclusion

According to Mutepfa, Mpofu and Chataika (2007), in the Zimbabwean context, "inclusive education involves the identification and minimisation or elimination of barriers to students' participation in traditional settings and the maximisation of resources to support learning and participation" (p. 342). Mutepfa et al. (2007, p. 342) further added that Zimbabwe has no specific legislation for inclusive education and that the thrust for inclusive education derives from adaptation of several government policy issues that are "consistent with the intent of inclusive education". This is corroborated by Musengi, Mudyahoto and Chireshe (2010) who also argue that, although Zimbabwe is a signatory to the Salamanca Statement and Framework (1994) among other international conventions and charters, there is still a lack of specific policy on inclusive education and even the legal support for what is perceived as inclusive education, is implied by the Zimbabwe *Education Act of 1996*.

In practice, there is a clear lack of understanding of inclusive education among stakeholders, and teacher development has not focused on inclusive teaching (Mafa, 2012). Most stakeholders still see inclusion mainly in terms of mainstreaming learners with special needs. Thus, in practice, in Zimbabwean schools, the curriculum and instruction options to support school participation by students with disabilities are defined in terms of locational inclusion, inclusion with partial withdrawal, inclusion with clinical remedial instruction and unplanned inclusion (Mnkandla & Mataruse, 2002; Mpofu, 2001). Furthermore, in terms of policy, the Secretary for Education's directive for inclusive education requires schools to provide equal access to education for learners with disabilities and routinely screen for any form of disability and admit any school-age child regardless of ability (Mutepfa et al., 2007). Thus, the most visible narrative about inclusive education in Zimbabwe still focuses not on systemic change, but on issues of access to general education programmes to students with disabilities. That also explains why most public discourse about special education is about increasing access to the general education curriculum and environments for students with disabilities (Mafa, 2012).

2.5.3 Teacher education

As indicated above, the concept of inclusion in Zimbabwe is still largely understood in terms of special education, driven by the philosophy that all children, regardless of individual differences – mild or severe – should attend the same school, and be taught in the same class with their peers (Mutepfa et al., 2007). The development of special education in the country has been slow in comparison to the rest of the education system. However, it is pertinent to briefly examine teacher education in that context.

Sources show that the first official special education teacher training programme was established at the United College of Education in Bulawayo in 1983 and this was followed by the introduction of undergraduate and graduate degrees in special education at the University of Zimbabwe and at Great Zimbabwe University at least a decade later (Peresuh, 2000). Presently, the United College of Education offers special education training to in-service teachers who have prior training and experience as general education teachers. Some Zimbabwean universities like Zimbabwe Open University and Great Zimbabwe University offer both bachelor's and master's degrees in special education (Mutepfa et al., 2007).

To date, however, the country does not have specific special education legislation (Mpofu, 2004) and as a result, special education is guided by the *Education Act of 1987*, which requires all children to have access to basic/primary education. This is supported by a series of directives from the Ministry of Education that are meant to support the education of children with disabilities. While this Act and supporting policies do not directly address special education teacher preparation, they have indirect implications for the process of teacher preparation. In line with this broad idea, which implies support for inclusive education, the government established what is called the Zimbabwe School Psychological Services and Special Education Department. This department in the Ministry of Education has the responsibility, among other things, to provide in-service training and support to schoolteachers on how to teach students with disabilities (Gatawa, 1998; Musengi et al., 2012).

In view of this situation, there is an urgent need for a paradigm shift in the teacher education curriculum to produce teachers who understand inclusion and inclusive education. Chakanyuka, Chung and Stevenson (2009) observe that most teachers who work in special schools and special classes in Zimbabwe have no special training to teach learners with disabilities and other special educational needs. Mnkandla and Mataruse (2002) point out that the majority of schools in Zimbabwe lack the personnel and material resources to cater to a variety of significant learning needs. Cohen and Cohen (1986, p. 294) note that "the majority of staff in mainstream schools have received no initial or in-service training for teaching pupils with special needs and may take on their new role with considerable trepidation".

This situation is not only exacerbated by the scarcity of qualified general teachers but also by the fact that, even in institutions that have embraced inclusive education, the teacher educators lack knowledge and skills on inclusive education. In a study to establish the current state of inclusion in Zimbabwe, it was found that most lecturers did not have adequate skills to effectively prepare teacher trainees for inclusive teaching and therefore the chances of these institutions producing effective and competent candidates for inclusive education were remote (Chireshe, 2013). The study recommended the mainstreaming of inclusion in teacher education and the enactment of explicit pro-inclusion policies to guide teacher development in the country, in addition to staff development of lecturers and the reconceptualisation of the type of teaching graduate that the country needs.

2.6 Conclusion

There are many similarities in the three contexts of this study. In all three, educational disadvantage was normalised by a legacy of colonialism which was characterised by racist policies that were deliberately shaped to produce negative educational experiences for generations of marginalised groups. Inevitably, the intergenerational disadvantages in education were supported by a reproduction of low socio-economic status in succeeding generations, which have been almost impossible to transform.

Nevertheless, each of the three countries has historical and other realities peculiar to their education system. Essentially, the central feature which distinguished South African educational provisions from other countries, was the extent to which racially entrenched attitudes and the institutionalisation of discriminatory practices led to extreme disparities in the delivery of education, which was also a reflection of the fragmentation and inequality in its entire fabric (Engelbrecht, 2006). However, as Engelbrecht (2013) notes, in South Africa, there has clearly been a shift from the historical legacy of special needs education in segregated schools to the broader context of inclusion in mainstream schools, where differences are recognised and valued, while participation is enhanced. In Canada too, there is evidence that there is considerable deliberate effort in teacher education to prepare teachers to engage with learner diversity arising from gender, ethnicity, sexuality and other forms of difference (Mitchell, 2015). There are also efforts to ensure that teacher candidates understand the historical, sociocultural and ideological contexts that create discriminatory and unjust practices in education. For Zimbabwe, while historical circumstances show a lot of similarities with South Africa, the conceptualisation of inclusion has remained peculiar to that context.

CHAPTER THREE: LITERATURE REVIEW

3. 1 Introduction

In this chapter, I trace the process that led to inclusion becoming a major discourse in education globally. Other than examining the different ways in which inclusion is defined in different contexts, I also discuss the various perspectives of inclusion in different educational settings. I also report on the current relevant research, both to provide an overview of the current status of the field, and to draw attention to some of the controversies prevalent in the inclusion discourse.

3.2 Inclusive Education: The Global Picture

The inclusive education discourse has been on the international agenda for many years now and a lot of research on inclusive education systems has been done, especially in developed countries (Ainscow et al., 2006; UNESCO, 2012; Qvortrup & Qvortrup, 2018). While in the early years, most of the research was conducted in the US and United Kingdom, there has been an increasing number of studies published in countries without a long tradition of inclusive education such as Cyprus, Turkey, Netherlands, New Zealand, South Korea and Indonesia, among many others (Mutua & Swadener, 2011). It should be noted that over the years, there has always been a desire to transform the very nature of educational systems so that greater access, participation and outcomes for all students would be attained and sustained (Artiles, Kozleski, & Gonzalez, 2010; Waitoller & Kozleski, 2013). But for many countries, this shift began in earnest after UNESCO's Salamanca Statement and Framework for Action on Special Needs Education was released in 1994 (UNESCO, 1994). According to Forlin et al. (2009), this document made perhaps the single most significant contribution to the global movement towards inclusive education and generated international support for its key belief that inclusive schools should educate most students while combating discriminatory practices in education.

The Salamanca Statement, very briefly, unequivocally urged the international community to embrace inclusive education. In all, 92 countries, including Canada, South Africa and Zimbabwe and 25 international organisations were signatories to this convention. Following the Salamanca

Statement and Framework, the United Nations Convention on the Rights of Persons with Disabilities (UN, 2006) called for the increased participation and inclusion of children with special needs. The 48th International Conference on Education, sponsored by UNESCO, recommended that inclusive education should be aimed at offering quality education for all, while respecting diversity and the different needs and abilities of the students and communities (UNESCO, 2008). The ministers of education and experts called upon member states to "train teachers by equipping them with the appropriate skills and materials to teach diverse student populations and meet the diverse learning needs of different categories of learners through methods such as professional development at school level, pre-service training about inclusion, and instruction attentive to the development and strengths of the individual learner" (UNESCO, 2008, p. 127). Unlike in the past, when inclusive education was thought of more in terms of serving children with disabilities within the general education setting, the notion of inclusion had been expanded to encompass other axes of disadvantage such as race, class, religion and gender, among others (Engelbrecht, 2013; Ferri, 2015).

Following the Salamanca Statement, UNESCO also published many educational materials and documents to support inclusive education. A UNESCO publication, "Policy Guidelines on Inclusion in Education" (2009), viewed inclusive education as the means by which education systems around the world can ensure not only high quality, but equitable education for all and affirmed the hope that inclusive education would bring fundamental changes to improve the response of schools to student diversity in order to ensure quality education for all (Oswald & Swart, 2011). An inclusive education therefore should seek to meet the needs of all learners, including those stemming from their cultural identities. The curriculum should, as much as possible, draw from and celebrate the ethnic identities of the students and be inclusive in terms of gender and disability.

While discourses about diversity and inclusion as a moral imperative have significantly impacted contemporary educational policy in most countries since the Salamanca Statement and the subsequent Dakar Declaration (UNESCO, 2012), the reality is that many learners throughout the world are still marginalised based on race, gender, religion, social status and many other sources of disadvantage, and these learners continue to be at risk of lower levels of educational opportunity and achievement than others (Ghoshi & Abdi, 2004; Oswald & Swart, 2011). While policy-makers

in many countries have come to recognise inclusive education as a key strategy to address the challenges of marginalisation and exclusion that confront many students in their education systems throughout the world, there are many countries like the United Kingdom, Austria, Italy and Spain (Waitoller & Thorius, 2015) where, in spite of a lot of rhetoric on social justice and inclusive education, there has been little clarity on what exactly inclusion is, often leading to a huge gap between policy goals and the realities of practice.

The Salamanca Agreement (UNESCO, 1994) is often considered the watershed moment in the inclusive education policy terrain. The Salamanca Statement on Special Needs Education (UNESCO, 1994), an international declaration adopted by 92 governments, outlines a commitment to inclusive education as an educational imperative; access to 'regular schools' for students with disabilities is identified in this document as the best way to combat discrimination and build inclusive societies. (Lalvani & Broderick, 2015). According to Shyman (2015), the main thrust of the Salamanca Agreement was to bolster the international effort to make social and educational inclusion the normal practice for individuals with disabilities on a global level, and to reinforce the notion that such inclusion was essential to human dignity and to the enjoyment and exercise of human rights (UNESCO, 1994). Thus, following the Salamanca declaration and the accompanying international ramifications, there was a substantial policy shift towards inclusive education across much of the world (Ainscow et al., 2006). Subsequently, the UNESCO Guidelines on Inclusion in Education (2009), a follow-up to the declaration, served to push the focus further – beyond just including all learners with disabilities – to the need for all schools to operate as inclusive spaces to support the needs of all learners adequately. Unlike in the past, when inclusive education was understood as serving children with disabilities within the general education setting, the scope of the discourse has expanded to focus on centreing inclusive education on human rights and social justice. As a result, in its current form, inclusion is a rights-based perspective to education adopted at Salamanca in 1994, with UNESCO urging countries to "concentrate their efforts on the development of inclusive schools" (p. 13).

However, as pointed out earlier, despite becoming an international "buzzword" (Thomas & O'Hanlon, 2005), with seemingly broad international acceptance, the notion of inclusive education is still highly contested, and its definitions vary across nations and in inclusive education literature (Matua & Swadener, 2011). There is a lack of consensus about what inclusion really means and

what its implications are at the level of policy and practice (Ainscow & Booth, 1998; Armstrong & Barton, 2001; Ainscow et al., 2006), reflecting the contrasting theoretical and ideological perspectives from which inclusion is considered (D'Alessio & Watkins, 2009). As Clough (2000) posits, inclusive education "is not a single movement, it is made up of so many strong currents of belief, many different local struggles and myriad forms of practice" (p. 6), and the wide range of definitions and interpretations are largely due to how this movement is interpreted and implemented in culturally and politically charged contexts. In some countries, the concept of inclusive education is seen as mainly concerned with the dismantling of segregated education (UNESCO, 2012), in others it is seen as an attempt to increase the number of learners accessing basic education, thereby conflating it with *Education for All* (UNESCO, 2000), especially in countries that are grappling with poverty and war.

Most countries still use traditional conceptualisations where inclusive education is seen as a way of addressing the needs of those learners identified as having special needs, either in mainstream or in special education (Clough & Corbett, 2000). This includes the US and many other first generation inclusive education nations such as Germany, Sweden and Austria, where inclusive education has become synonymous with special education in which research and practice target only populations with disabilities (Artiles et al., 2011). Thus, inclusion is predominantly about placement and service delivery models for such learners (Baglieri, Bejoian, Broderick, Connor, & Valle, 2011). This is partly explained by the fact that after the 1994 Salamanca Statement, most countries caught onto the fact that the inclusion principles had endorsed inclusion as an important benefit for special education (Artiles et al., 2006). In a lot of countries to date, the boundaries between the two concepts remain blurred, in spite of the considerable shift from special education to inclusion in terms of principle and policy (Clough & Corbett, 2000). Therefore, it is important at this point to stop and examine some of the most common definitions of inclusion in the different contexts.

3.3 Definitions of Inclusion

In this section I will examine the different definitions of inclusion and explain how perceptions have changed over the years. As noted above, there have always been competing visions of inclusion and as a result, there is no fixed global consensus on its meaning and implications since

it embraces different goals and different motives for different people. In fact, despite the convergence of international policy and legislation around the inclusion agenda and the rapidly growing literature on this topic, there are continuing debates and competing views about the concept of inclusive education. Inclusion still means different things to different researchers, reflecting the contrasting theoretical and ideological contexts in which it is considered (D'Alessio & Watkins, 2009). Nevertheless, inclusive education has increasingly become a focus of debate in discussions about the development of educational policy and practice (Ainscow & Sandill, 2010; Shyman, 2015). There has been a growing consensus that inclusion is an appropriate philosophy and a relevant framework for restructuring education, and this has come about largely as a result of both empirical evidence and moral imperatives. As a result, educational discourse across the globe has advanced knowledge about inclusion and inclusive education, in spite of the fact that the definition and meaning of inclusion remains a subject of heated debate (Slee, 2000; Ainscow & Sandill, 2010; Florian 2012).

According to Brennan and Naidoo (2008), the original version of inclusive education borrows from fields of education and psychology to construct and situate special education students as problems in need of normalisation and correction so that they can assimilate into existing cultures of mainstream schooling. As a result, as explained earlier, the focus of inclusion was always limited to the traditional constituency of special education, with most public discourses about special education addressing only continued progress towards increasing access to general education curricula and environments for students with disabilities. Consistent with such a mind-set, Idol posits that essentially, "inclusion means that the student with special education needs is attending the general school programme, enrolled in age-appropriate classes 100 per cent of the school day" (2006, p. 4). This definition focuses simply on the location of service delivery. In the US, the National Centre on Educational Restructuring and Inclusion (1995, p. 30) defines inclusion as:

> The provision of services to students with disabilities, including those with several impairments, in the neighborhood school, in age-appropriate general education classes with the necessary support services and supplementary aids (for the child and teacher) both to assure the child's success – academic, behavioral, and social – and to prepare the child to participate as a full and contributing member of society.

Similarly, Florian et al. (2010) acknowledge the definition of inclusive education as based on the principle of local schools providing for all children and young people, regardless of any perceived

social, cultural or intellectual difference or disability. Initially, educational policy in the UK promoted inclusive education as the teaching of disabled and non-disabled children within the same neighbourhood schools (Hodkinson, 2011), with the emphasis being on location. In these views, inclusion was primarily about a special needs student and centred on the location in which education was taking place, rather than the nature of instruction, specifically placing disabled pupils in the same classrooms with their non-disabled peers. Because its focus was merely a relocation of students with disabilities, it was virtually synonymous with integration, which was based on a deficit model, because its focus was primarily making students with exceptionalities ready for accommodation into mainstream schooling (Valle & Conner, 2011). In line with that view was also the UN Convention on the Rights of Persons with Disabilities, Article 24, Clause 2 (b), which urged that all states should ensure that all persons with disabilities should access an inclusive, quality, free primary education and secondary education on an equal basis with others in the communities in which they lived (UN, 2011).

There was a gradual shift from these definitions, however, partly as a result of concerns about segregation and over-representation of minority groups in special education provisions, especially in the US (Bell, 2016). This shift is reflected in Shyman's (2015, p. 6) first definition of inclusion, which says inclusion refers to "all individuals, regardless of exceptionality, [who] are entitled to the opportunity to be included in regular classroom environments while receiving the supports necessary to facilitate accessibility to both environment and information". This definition makes a significant shift from "students with disabilities" to "all individuals, regardless of exceptionality" although it retains the core concern of particularised support and access. In support of this shift, Shyman further argues that "a truly effective inclusive educational experience requires not only an inclusive classroom placement, but also a pervasive shift in the philosophy and culture of the school with specific regard to individuals with exceptionalities" (p. 5).

Over the years, there is no doubt that reform efforts have sought to transcend this "narrow" emphasis on programme placement. Such assimilationist approaches, which viewed inclusion as only being about students with disabilities, gradually gave way to more transformative definitions that attempted to critique and question the normative parameters of the dominant culture of schooling (Artiles, Harris-Murri, & Rostenberg, 2006). Ainscow et al. (2006) argue that these narrow definitions of inclusion referred only to a specific group of students such as those with

exceptionalities, instead of broad definitions which were more global and viewed inclusion as a process of how schools should incorporate support for all individuals in the school population. Currently, the concept of inclusion has expanded to embrace those learners who are at risk of marginalisation or exclusion for whatever reason. It is now mostly thought of in terms of an approach seeking to remove barriers to learning and participation, providing resources to support learning and participation (Booth & Ainscow, 2002). Furthermore, it also now sometimes includes increased capacity of schools to respond to diversity (Booth & Ainscow, 2002). A quick look at a few countries makes this evident. In the UK, for example, inclusion initially emerged as a complex and highly problematic phenomenon characterised by considerable ambiguities, but over the years the official definition of inclusion has evolved to:

> The participation of all pupils in the curriculum and social life of mainstream schools; the participation of all pupils in learning which leads to the highest possible level of achievement; and the participation of young people in the full range of social experiences and opportunities once they have left school. (Department for Education and Employment, 1997, p. 23)

Further, inclusion should be "more than a concern with one group of pupils such as those who have been or are likely to be excluded from school – it is about equal opportunities for all children and young people whatever their age, gender, ethnicity, attainment or background" (Ofsted, 2001, p. 1). Learners cannot be defined only in terms of their special education needs because other factors like social disadvantage, family background**,** gender and ethnicity are important. Also notable is the view of the British Psychological Society (2002), that defines inclusion as being about the right of all pupils to participate fully in school life and the school's duty to welcome and accept them. This position rejects all forms of segregation and exclusion of learners for whatever reason, be it ability, gender, language, family income, sexuality or religion. The emphasis, in this view, should now be on making learning more relevant to all learners, rethinking and restructuring curriculum and transforming environments to accommodate diversity (ibid.).

Canada, based on its Federal Charter, began with an understanding of inclusive education that was more aligned with the principles set forth in the Salamanca Statement (UNESCO, 1994), but has also evolved a broader view that inclusive education goes far beyond mere physical placement and instead involves attention being paid to all aspects of schooling – curriculum, assessment, pedagogy and other support (Mitchell, 2008). Mitchell (2008) notes that in accordance with this

trend, many countries in Latin America have extended the concept of 'special education' beyond traditional disability categories, adopting instead the much broader definition of students who might have difficulties learning the established curriculum for whatever reason and as a result require additional or different resources. In contrast, the US does not have an official definition of inclusion, although the definition has generally become synonymous with the placement of students with disabilities in the general education classroom.

In line with this trend, Slee (2001) argues that inclusive education can best be understood by examining the experiences, conceptualisation and struggles of other marginal identities that arise from factors such as socio-economic disadvantage, gender, race, sexuality, monolingualism and geographic isolation. Ferguson (1995) places issues of equity and social justice at the heart of the inclusion debate and defines inclusive education as "a unified system of public education that incorporates all children as active fully participating members of the school community; that views diversity as the norm; and that ensures a high quality education for each student by providing meaningful curriculum, effective teaching, and necessary supports for each student" (p. 286). Such a definition clearly makes a shift from characteristics of individual children and location to address barriers to participation and learning experiences by all students in the school system. As a result, there has been a significant departure from the special education model that has kept the spotlight on the individual learner with distinct deficits (Shaddock, 2010), and many countries today view inclusion in terms of a broader equity agenda for all marginalised learners, embodying multiple forms of difference (Artiles & Dyson, 2005). Booth and Ainscow (2002) for example, have re-framed the language of inclusion beyond 'special needs' to 'barriers to learning and participation', thus, taking inclusion beyond issues of access and equality in mainstream settings to encompass issues of systemic educational change. Even the UNESCO International Bureau of Education (2009) definition shifts considerably beyond the narrow idea of inclusion as a means of understanding and overcoming a deficit to concern with issues of gender, class, ethnicity, health, human rights, access and participation. Inclusion is now defined as "an on-going process aimed at offering quality education for all while respecting diversity and different needs and abilities, characteristics and learning expectations of the students and communities eliminating all forms of discrimination" (UNESCO, 2008, p. 3), thereby connecting inclusion to principles of equity and social justice.

In the context of this study, it is noted that both South Africa and Canada seem to embrace this view of inclusion. In Ontario for example, the document '*Equity and Inclusive Education in Ontario Schools*' defines inclusion as "education that is based on the principle of acceptance and inclusion of all students. Students see themselves reflected in their curriculum, their physical surroundings, and the broader environment, in which diversity is honoured and all individuals are respected" (Ontario Ministry of Education, 2014, p. 90). Equally, South Africa has seen a shift from the historical legacy of special needs education in segregated schools to the broader context of inclusion in mainstream schools where differences are recognised and valued, while participation is enhanced (Engelbrecht, 2013). Because South African legislation and policies on inclusive education have been formulated on the backdrop of the apartheid state, there is an inevitable emphasis on equity and human rights, unlike Zimbabwe where inclusive education is conceived more in terms of disability and as primarily locational or proximity integration (Oswald, 2007). So, for South Africa, according to the *Education White Paper 6*, inclusion goes beyond mere access to include social inclusion, curriculum accessibility and emotional inclusion. Inclusion rejects rigid curricula, prejudice and discrimination against individuals or groups and negative stereotypes of girls and other marginalised groups. In Zimbabwe, inclusion is still ordinarily seen as education for all children irrespective of their abilities and disabilities, but emphasises provision of education to vulnerable children in difficult circumstances such as children with disabilities, street children, the girl child, working children and children infected and affected by HIV and AIDS (UNESCO, 2008, p. 17). For most teachers, it simply implies a restructuring of mainstream schools to ensure that every child, regardless of disability, is fully involved in a school community.

In most educational settings, inclusion at this point means that educational systems and institutions should be developed to be responsive to the systemic exclusion of all those considered to be different from the dominant culture of schools, in terms of not only disability but also other mechanisms like race, language, religion, ethnicity, gender or home background (Artiles & Kozleski, 2015). Meanwhile Slee and Allan (2001) give a conceptual construction of inclusion in which inclusive education is understood as a transformatory political project which promotes the radical re-conceptualisation and reconstitution of schooling to embrace all students through the recognition, legitimisation and celebration of difference to include race, gender, class, sexuality, ethnicity and geographic position. In this view, it is the schooling, the school curriculum and

pedagogy that are problematic and require radical change, and not the students. Booth (2011), echoing the new thinking, also sees inclusion as connected to the development of democratic participation for everyone and involves challenging and reducing all forms of exclusion.

The new thinking seems to suggest that inclusive education research and practice must now be examined in the larger context of cultural histories and practices related to how society treats difference (Artiles & Kozleski, 2007). Unlike traditional conceptualisations of inclusive education, in this refined construct, all the complexities that lead to, mediate and maintain exclusion, are acknowledged and examined.

3.4 Conclusion

While the notion of one definition of inclusion continues to be elusive, there is clear evidence that the inclusion discourse has, over time, taken on a broader scope to focus on the need to centre inclusive education on equity, diversity and equal educational opportunities for all children. The basic premise of inclusive education is that schools are about belonging, nurturing, and educating all students, regardless of their differences in ability, class, culture, gender or ethnicity (Booth et al., 2006). Inclusive schooling "propels a critique of school culture and thus, encourages practitioners to invent what can be, and should be, to realise more humane, just and democratic learning communities. Inequalities in treatment and educational opportunity are brought to the forefront, thereby fostering attention to human rights, respect for difference and value of diversity" (Udvari-Solner, 1997, p. 142). As Sapon-Shevin (2003) succinctly states, "inclusion is not about disability, inclusion is about social justice by embracing inclusion as a model of social justice, we can create a world fit for all of us" (p. 26).

3.5 A Social Justice Definition of Inclusion

While some of the above definitions are certainly more comprehensive than earlier ones, some researchers insist that they are inadequate because they do not go far enough to frame inclusion in a social justice framework (Shyman, 2015). Shyman, whose earlier shift was noted, argues that the field of education as a whole lacks a definition of inclusion that is globally sensitive, based on social justice and contends that "the application and practice of social justice cannot be divorced from inclusion, and any real attempt at implementing inclusive education must consider what it

means to promote and practice a socially just society" (2015, p. 353). In Shyman's view, inclusive education must be thrust beyond the educational realm into the greater social milieu; in social justice terms, "inclusive education becomes an issue that extends beyond merely a practice or approach to education; it is a means of calling into question a socially unjust and discriminatory system that is designed to enhance the schooling environment for all individuals regardless of their exceptionality" (Shyman, 2015, p. 354). This view goes beyond just increasing participation of students in curriculum and in a community of local schools in terms of what they learn; it should also increase their interaction with others outside the classroom (Booth & Ainscow, 2002) to focus attention on those who are marginalised by educational policies and associated structures of schooling that privilege certain forms of knowledge and ways of learning over others. From this perspective, any examination of inclusive education, therefore, is limited if it focuses only on learners and their exceptionality without recognising that many learners are marginalised because of the broader societal inequities that surround schooling.

3.6 Different Perspectives of Inclusion

Because inclusive education is one of the most dominant and controversial issues confronting educational policy-makers and professionals around the world today (Mitchell, 2015), it should be no surprise that there are different established perspectives on this subject. Just as special education provided the starting point for the different definitions above, the special education perspective will first be discussed here and then the other perspectives will be examined in relation to their differences from this perspective. A social justice and a critical pedagogy perspective will also be examined. In this context, social justice as a perspective is related to, but not conflated with, Nancy Fraser's social justice theory which is later discussed as an analytical tool.

3.6.1 A special education perspective of inclusion

Although at some point inclusion was viewed as almost synonymous with the education of 'special needs' students or differently-abled students (Miles & Singal, 2010; Kiuppis, 2014; Sharma & Das, 2015) the 'classic' special education view had always assumed that it was not possible to include children with learning difficulties in the mainstream settings because their needs were different (Rouse, 2008). To successfully teach children who are different, it has been argued,

"requires that they be grouped homogeneously so that special pedagogical approaches could be deployed by teachers who had been trained" specifically for that task (Kaufman et al., 2005 as quoted in Rouse, 2008, p. 6). However, this view began to change as it was realised that by creating a separate parallel system for students with disabilities, they were being excluded from opportunities to be educated alongside their non-disabled peers and were being denied access to the general education curriculum and their right to a free and appropriate education. The main argument was that exclusion of some children from any form of education, based on identifiable physical condition and the segregation of others in separate schools and classrooms, violates their fundamental human rights (Artiles et al., 2006). So, it was important to correct the role schools played in reproducing inequalities for students with disabilities by including them in the mainstream. For that reason, the process of inclusion became synonymous with special education.

Thus, the dominant discourse in the US is that inclusion is about placement and service delivery models for students identified with disabilities (Valle & Conner, 2011). Studies conducted in Greece, Australia, and South Korea show similar conceptions. For many years in the UK too, inclusion referred to the extent to which students with 'special educational needs' could be integrated into the mainstream learning and teaching environment (Hockings, Cooke, & Bowl, 2010). This is partly explained by the fact that the 1994 Salamanca Statement endorsed inclusion as an important benefit for special education (Artiles et al., 2006). Over the years though, many teachers and researchers have tried to move away from this view of inclusion as being concerned only with students with special needs (Shaddock et al., 2009). In spite of that intended shift, there are many countries where the special education paradigm has continued to prevail and has continued to shift more towards the individual pathology models of service delivery (also known as the Child-Deficit Medical Approach) arising from the assumption that disability is a condition located within the individual that requires differentiated services by personnel with specialised skills (Artilles, 2006).

3.6.2 Pathological model to special education

This medical model frames the development of children according to a psycho-neurological trajectory and is about the formidable tragedy discourse that surrounds disabled people, which depicts disability as a deficit and an abnormality to be avoided at all costs (Sze, 2008; Lalvani,

2012). Disability is conceptualised as impairment or as limitations to be overcome. The underlying assumption is that all children are supposed to develop and learn naturally, therefore any deviation from the norm is viewed as an abnormality. In line with that thinking, educationists and psychologists also came to accept that all barriers to learning were a result of individual deficits. These deficits could either be corrected or the learner would need specialised support which would result in such learners being placed in special schools on the recommendation of medical experts whose views were often accepted as incontestable. Traditional special education discourses, which were deeply entrenched in the medical model paradigm, continued to give support to the existence of parallel systems of education and ability-based segregation (Lalvani, 2012). This pathological model totally ignored how socio-economic factors could influence the development and perpetuation of behavioural and emotional factors (Slee & Allan, 2005; Cochran-Smith & Dudley-Marling, 2012). Because disability was defined in terms of the individual's traits and characteristics, the dominant view of social justice was also individualistic, emphasising access and distribution of resources. To achieve equality, inclusion was based on a distributive view of social justice advancing arguments based on individual rights and ethics. Inclusion could therefore be achieved through redistributing resources by integrating disabled students in mainstream classes. This distributive view of justice was principally developed around the Rawlian perspective of social justice (Rawl, 1971) which emphasises access and distribution of resources. The main view was that unequal distribution of resources is acceptable only to the extent that the weakest members of society benefit from that inequality (Artiles et al., 2006).

The major limitation in this mode of inclusion was that access does not necessarily translate into meaningful or equal participation (Artiles et al., 2006). Although more resources were distributed to students with disabilities and access to regular schools increased, minority students with disabilities still received fewer resources and were placed in more segregated programmes than their counterparts. Distributive solutions failed to acknowledge the social contexts in which different individuals function in a society with such varied markers as language, race, gender and class which can enable or hinder access to participation or secure resources in institutional contexts. In addition, greater access and redistribution of resources does not transform historically rooted conditions and structures that created the inequalities in the first place (Artiles et al., 2006).

3.6.3 Socio-cultural model of disability

Proponents of the 'social model' of disability argue that, whereas impairment is a physiological condition, disability is largely socially constructed through exclusionary policies and practices, contending that once disabling attitudinal, architectural and socio-economic barriers are removed, most people with impairments will be included in the fabric of social, economic and political life (Slee & Allan, 2001; Morina Diez, 2010). In this model, disability is a social construct created by an ability-oriented environment. Unlike the medical model which locates dis/ability within individuals, the social model examines the cultural affordances and constraints, as well as the socio-political interests that contribute to shaping a difference, into a disability (Morina Diez, 2010). The disability problem is not located in the individual but in the societal, economic, political and cultural system which has failed to meet the needs of these individuals. It is the environmental, structural and attitudinal barriers to participation that disable and exclude, not the individual deficits. Special education needs and disabilities have been historically analysed (incorrectly), through the pathologising lens of medicine and psychology and excluded from sociological debates concerned with issues of social justice and equality of opportunity (Baynton, 2001; Goodley, 2007). The individual student is defined in relation to a 'known' category of disability, for example, the inability to hear or an inability to concentrate. But such focusing negates all the other possibilities of learning they are capable of and loses sight of the important fact that the constitution of learners' needs in schools proceeds from a far more complex set of relationships than those that are organic within the child (Baglieri & Shapiro, 2012). It is society that disables people; for example, educational exclusion has been generated by policy making and professional practices, attitudes and policies (Morina Diez, 2010), which has led to the educational and social marginalisation of people with impairments (Slee & Allan, 2001). Many proponents of the social model argue that the lived experience of disability is situated in socio-political contexts rather than embodied deficits (Broderick & Ne'eman, 2008; Schreiber & Valle, 2013)**.** Once we remove the disabling attitudes, structures and socio-economic barriers, most of the so-called "disabled" people will be able to participate in socio-economic and political life in ways like everybody else. In this social model of disability, just as in Fraser's model of inclusion, the site of intervention is not the individual, but rather the social environment that affects a person's capacity for participation. In line with this thinking, therefore, schools would need to consider the cultural and symbolic changes

to their structure in order to achieve genuine inclusion (Waitoller & Kozleski, 2013). The individualistic focus deflects attention from the structures and forms that govern distribution itself, whereas the problem really lies in the structured ways in which people relate to each other within the social institutions that exist (Waitoller & Kozleski, 2013).

Although there has been a significant departure from the special education model that kept the spotlight on the individual learner with distinct deficits, there are still many countries today where inclusive education is still seen as synonymous with special education, where research and practice still target mainly populations with disabilities (Artiles et al., 2011). While the most common stereotype of inclusive education might still limit the discourse to a narrow medical model which frames inclusion around integrating disabled students into mainstream classrooms, there is expanding research in many countries into the complex socio-cultural, pedagogical and political factors that bring about differential outcomes of schooling.

3.6.4 Social justice perspective of inclusion

In this perspective, inclusion refers to "a society built upon ideals of social justice where participation and success are irrespective of race, gender, socio-economic status, ethnicity, age and disability so that disadvantage is not reproduced" (Nuran et al., 2000, p. 63). It is also about human rights, egalitarianism of opportunity, human dignity and fairness for all. It may or may not always be linked to economic interests, but its primary aim is to enable all human beings to participate fully in society with dignity (Gidley et al., 2010).

Gerwitz (2006) defines social justice as centred on the idea of disrupting and subverting arrangements that are designed to promote marginalisation and exclusionary social processes. For Goldfarb and Grinberg (2002), social justice is viewed as the practice of altering institutional and organisational arrangements by "actively engaging in reclaiming, appropriating, sustaining, and advancing inherent human rights of equity, equality, and fairness in social, economic, educational, and personal dimensions" (p. 162). Social justice involves coming to understand oneself in relation to others, examining how society constructs privilege and inequality and how this affects one's own opportunities, as well as those of others. It is also about exploring the experiences of others and appreciating how these experiences inform their lifeworlds, perspectives and opportunities

(Michelli & Keiser, 2005). This view of social justice is similar to Nancy Fraser's (2008) trivalent conception of justice which frames justice in terms of redistribution, recognition and representation. Redistribution places the substance of justice firmly in the economic order of society, while recognition locates its substance in the status order and representation places its substance in the political order. In education, the Fraser paradigm would entail a sustained effort to make sure that all learners have access to learning opportunities and are able to participate equally with their peers. It would also require that learners get the same cultural recognition and equal opportunities for self-representation (Waitoller & Kozleski, 2013).

In other inclusion discourses, inclusion is viewed as social justice as well (Artiles et al., 2006), particularly in inclusive education where the primary goal of inclusion is to achieve social justice and equity for all marginalised populations (Bloom & Cohen, 2002). In this view, social justice cannot be achieved when some students are excluded from key educational processes but can only be achieved when all students are included in institutional practices and processes in a meaningful way (Ryan, 2006). Justice for all is only possible when there is equitable distribution of material resources and equitable patterns of cultural recognition and representation.

Furthermore, in education, inclusivity should concern itself with successful participation and the capacity to generate greater options for all people in education and beyond. In an educational system fraught with inequitable structural and social conditions, it is critical that research be contextualised around cultural-historical conditions. In dealing with minoritised groups for example, it is important to always remember that their cultural repertoire has been historically silenced both through the rules of participation that regulate classroom ecologies and the dominant knowledge systems encoded in the curriculum (Nasir et al., 2006). The quest for inclusion has revealed that Western education contexts have always been privileged, and that white middle-class ways of knowing have led to the marginalisation of 'other' ways of knowing and being (Keddie, 2012). Ability, ethnicity, language, gender and social class differences have historically been intertwined and related to deficit thinking throughout the history of schooling (Artilles, 2011). In fact, the interlocking of disability and race alongside lower economic backgrounds have been especially damaging for some non-dominant groups and has been used to justify slavery, eugenics, colonialism and educational segregation (Erevelles & Minear, 2010). Therefore, it is imperative to

pay attention to issues that have to do with recognising and valuing differences and providing opportunities for equal participation.

Thus, from this perspective, inclusive education must be grounded in a deeper understanding of the students served by the schools today and be critically aware of the cultural-historical legacies of disadvantage that permeate schools and other social institutions, in addition to critically analysing the assumptions that inform inclusive education (Artilles & Kozleski, 2007). In the school system, for example, creating culturally relevant and inclusive learning environments that connect with the funds of knowledge specific to marginalised groups is seen to support greater participation, motivation and achievement for students from these groups (Sleeter, 2001; Bishop & Berryman, 2006). Social arrangements should show equal respect for all and create opportunities for all to achieve self-esteem. The process of inclusive education also requires a transformation in curriculum and pedagogy from a generalised dominant culture perspective to a pluralistic and cosmopolitan one (Banks, 2001), in order to make visible the blindness, silences and exclusions that have permeated the histories and educational experiences of marginalised groups.

Of course, all this cannot be possible in the school system unless teachers are adequately prepared to teach for social justice. It is important then, for teacher education programmes to attempt to develop knowledge, skills and dispositions that will enable teachers to teach for social justice through inclusion. Teacher education that is consistent with social justice should include a critique of universalistic views of knowledge which do not adequately account for the knowledge, traditions and experiences of marginalised groups and confront all the other cultural biases and practices in the curriculum. Teachers must get rid of the deficit mentality regarding the abilities of those who are different and replace it with an openness to non-Eurocentric knowledge claims and epistemological assumptions (Niyozov & Anwaruddin, 2014).

This view of social justice in education has not been without its critics. Some critics have suggested that the focus on social justice can be counterproductive, arguing that teacher programmes which focus on social justice tend to ignore traditional educational goals related to subject matter, knowledge and teacher competence, while concentrating on intentionally indoctrinating teacher candidates into an ideology (Cochran-Smith, 2008). Reynolds (2012) also argues that too much attention on social justice diverts attention from academic achievement and produces students who

are ill-prepared for a complicated and competitive world and further accuses those who are committed to social justice education of political bias and of 'brainwashing' children in the public education system. Yet a social justice schooling agenda does focus on academic and other skills but goes further to encourage students to critique content and to question traditional ideas and school norms (Cochran-Smith, 2004). In terms of teachers, there is indeed a need for teacher education to develop professionals who view teaching as a political activity and who are prepared to examine their practice in the context of their learners' social, cultural and ethnic diversity (Cochran-Smith, 2004). Teachers have a responsibility to expose the inherent bias of knowledge which derives from its historical socio-cultural contextuality without brainwashing their students. Cochran-Smith argues that teacher education for social justice is indeed political: "of course teacher education for social justice is political – it has to do with who has power and access to learning and life opportunities. All professional education – whether in law, social science, or education – is value laden and ideological rather than neutral and apolitical" (Cochran-Smith, 2006, p. 200).

This perspective is no doubt a significant departure from the traditional special education perspective outlined above. Besides considering the socio-cultural and other contextual factors like the social model above, the perspective singularly addresses both the issues of materialistic injustices, group specific traits and identities and other unjust social arrangements.

3.6.5 Critical pedagogy perspective

In critical academic analyses, inclusion is conceptualised as a political perspective that aims to reorder social arrangements; it is a radical challenge to the elitist, exclusionary and hierarchical status of schooling and against economic and social reproduction regimes (Giroux, 2010). Inclusive education is viewed as emancipatory education and is designed and implemented to achieve equity, social justice and social transformation. Freire (1970) advocates for a shift from personal awareness to social action and an awareness of social structures of oppression and critical social consciousness. The broad objective of critical pedagogy is "to empower the powerless and transform existing social inequalities and injustices" (McLaren, 2003, p. 186).

Kincheloe (2005) also argues that inclusion in education should be viewed in the context of power and discourse. Both the policy makers and the excluded should see their experiences in terms of power and discourse (people's internalised values and the way they behave) because both power relations and society's wider discourses tend to reinforce existing social belief systems. In educational inclusion, mainstream strategies must therefore consider individual differences and the different social networks; how people's past histories have been shaped and how that has shaped their present attitudes, always bearing in mind that likely, this shaping has been at the convenience of the dominant values of the time. Arguing that the way attributes of people and practices are valued or devalued affects how students participate in the pedagogical process, Kincheloe (2005) has this to say:

> When new discourses eventually invite the formerly excluded social groups to claim learning for themselves, it is usually at the denial of their social or cultural identity, which in the end produces confused and fragmented participation rates among the excluded as they struggle to reposition themselves amid the changing discourses of inclusion.

For inclusion to succeed against this background, it is important that we recognise different ways of knowing and doing within our mainstream learning programmes and accept that for learning experiences to be meaningful to marginalised social groups, the approach must be emancipatory rather than reinforcing the status quo (Ryan, 2006). It is also important to note that the curriculum, including the learning environment and teaching relationships, all impact the student's experience since what is taught and how it is taught are all value laden and are likely to privilege only certain groups in society. Dominant power systems define who has authority to know and who determines what is valuable knowledge. Because only certain kinds of knowledge count as powerful or authoritative, the educational institutions end up perpetuating the status quo of this power relationship, thus, making it difficult for those already silenced to get their voice heard. Social justice cannot be achieved under conditions of oppression and the way to challenge oppression is to make visible and vocal the underlying assumptions that reproduce structures of dominance in order to make it possible for oppressed people to collectively begin to imagine alternative possibilities for organising social life.

Essentially, therefore, an emancipatory teaching approach raises the consciousness of the marginalised. Consciousness enables the learners to reposition themselves as individuals within

their own understanding of their reality. Emancipatory pedagogy helps learners to validate their subjugated knowledge in order that it not only challenges the status quo, but also contributes to social development (Ryan, 2006). This perspective clearly supplants the traditional definitions of inclusion which focus mainly on restructuring the mainstream schools to accommodate students with special needs. Like the social justice conception of inclusion, the critical perspective sounds like a radical view which suggests a reconceptualisation of the whole notion of inclusion which focuses mainly on disability and presumes a shift from commonly accepted traditional interpretations of things to seek new ways of understanding the world.

3.7 Conclusion

In sum, while both the definitions and perspectives of inclusion certainly confirm that there is no universal definition (Florian, 1998) and the concept remains elusive (Ainscow, 1999), there is increasingly greater common ground in terms of how it is conceptualised today. Instead of the rather simplistic idea of including all children under one roof, there is greater consideration of the ideal of including all children in the common enterprise of learning (Warnock & Norwich, 2010) and ensuring parity of participation by wholly transforming the learners' knowledges and contexts and material conditions. As Nutbrown and Clough (2006) put it, inclusion is not for certain kinds of learners but for "all children – respecting them for who they are, respecting their language, their culture, their history, their families, their abilities, their needs, their name, their ways and their very essence" (p. 9). In accordance with these views, this study adopted the following definition of inclusion by the UNESCO International Bureau of Education (2009):

> An ongoing process aimed at offering education for all while respecting diversity and the different needs and abilities, characteristics and learning expectations of the students and communities, eliminating all forms of discrimination. Such a perspective connects inclusive education with principles of equity and social justice.

CHAPTER FOUR: THEORETICAL FRAMEWORKS

4.1 Introduction

The purpose of this chapter is to explore and explain the theoretical frameworks that informed this investigation of the conceptualisation and enactment of inclusion in different higher education contexts. I adopted Bhaskar's critical realism (1978) as a metatheoretical framework. I also explored Nancy Fraser's (2008, 2009) social justice theory and Joan Tronto's (1993) political ethic of care, both as interpretive lenses and as analytical frameworks. All the theories will be discussed below.

4.2 Critical Realism

Critical realism is a philosophy of reality which can be used as an under-labourer to research. This framework adds ontological depth to the understanding of a phenomenon by providing a method of looking beneath the surface to identify causal mechanisms. All theories about the world are grounded in a particular perspective and worldview and because researchers often base their work on certain philosophical perspectives, it is always important to begin by trying to understand the worldviews and premises of the paradigms that underpin any study (Ponterotto, 2002).

The researcher's view of social reality is fundamental because it influences all the other choices and assumptions to be made about the study. The ontological insights generate several methodological prescriptions for the social researcher (Isaksen, 2018). The philosophical perspective has practical consequences in research because the researcher's choice of a paradigm influences the status and nature of data which has direct implications on the research findings. As Archer (1995) argues, all social theory makes some assumptions about what kind of reality it is dealing with and how that reality is explained. Thus, before one can talk about knowledge of the world, or knowing a social phenomenon, it is imperative to start by knowing the form of that world, or the form of the phenomenon (Bhaskar, 1978). The search for knowledge therefore must start with a conceptualisation of what is real. This is what Collier (1994, p. 50) means when he argues that "we can't have an explanation until we know what is to be explained". Ultimately, a good

research design must decide not only on the appropriateness of methodology but also its philosophical underpinnings. As Trigg (2001) says, this is "the indispensable starting point for all the social sciences" (p. 255). For that reason, I have used critical realism as the metatheoretical framework underpinning this study. Critical realists are committed to identifying deep underlying, non-observable structures and generative mechanisms with real outcomes in the real world. I adopted the critical realist philosophy to underlabour all my research decisions and to shape and guide the study's methods.

As indicated above, I adopted critical realism as the metatheory for this study and will elaborate below its relevance to this study. Critical realism is a philosophical position that derives mainly from the work of Bhaskar (1978, 1979, 1993) but over the years, it has also been developed by other scholars such as Archer (1995), Sayer (1992, 2000) and Fleetwood (2004, 2005). It is generally accepted that critical realism (also known as transcendental realism) came about as a reaction against the positivist conception of science that had dominated the first two thirds of the twentieth century (Bhaskar, 1986, 2009; Sayer, 2012; Price & Martin, 2018). Critical realism provided the foundation for the shaping of the theoretical framework of this study.

The first tenet of critical realism is its view of reality; that what is real (ontology) cannot be reduced to our knowledge of reality (epistemology). There is a clear distinction between our knowledge about the world (transitive realm) and the world which is the object of that knowledge (intransitive realm) (Bhaskar, Danermark, & Price, 2017). In the social world, mechanisms exist independent of our investigation of them, but they are themselves both transformed and reproduced by humans (McAvoy & Butler, 2018). The nature of the depth ontology of critical realism suggests that the real, the actual and the empirical make up three overlapping domains of reality and that these levels are not simply constructions in the mind but real layers of reality.

Unlike positivism, critical realism does not rely on the repeatability of events in order to assess causality but instead analyses causal laws as tendencies of natural and social objects (Bhaskar, 2008). Critical realists understand causality much more as consisting not of regularity but of real causal mechanisms and processes, which may not produce regularities (Maxwell, 2004). As Sayer (2000) argues, "observability may make us confident about what we think exists but existence

itself is not dependent on it" (p. 12). Thus, instead of perceiving a causal law in terms of regularity, an observed event will be contingent upon the effects of several mechanisms interacting.

For Bhaskar, the idea of reducing ontology to epistemology by limiting 'reality' to what can be empirically known through observation, is the fundamental difference between critical realism and positivism. Bhaskar also regards it as a fundamental flaw in the positivist paradigm. The collapse of the distinction between ontology and epistemology is what Bhaskar calls an "epistemic fallacy" (Bhaskar, 1989; Scott, 2000). The epistemic fallacy emerges when epistemology is over-emphasised at the expense of ontology. In this instance, this would mean reducing inclusion research to the existing knowledge and experience of inclusion. Knowledge is not only what appears and can be observed or experienced; it is about relatively enduring underlying structures that generate those appearances and experiences or make them possible.

In this study, knowledge about the epistemic fallacy of conflating what can be known about the world and our experience of it, became very significant at data analysis stage. It became important to look beyond the experiences and narratives of the teacher educators and teacher candidates to examine the mechanisms that gave rise to them. The narratives of participants were important because they were linked to the causal processes in the world as experienced by teacher educators and teacher candidates. Notable in critical realism is the fact that causal processes as viewed here are not restricted to physical entities. All the mental processes and meanings and beliefs and intentions held by people are essential parts of causal mechanisms (Maxwell, 2004; Sayer, 2010). Proponents of critical realism argue that it provides a viable conceptual alternative to both positivism and postmodernism (Fleetwood, 2005). It is sometimes seen as a third way out of the trappings of empiricism that reduces reality to what is experienced or observed, and, on the other hand, it is a way out of the trappings of relativism that reduces reality to our construction of it (Shay, 2016).

4.2.1 The ontological position of the study

In this section I will explain the key features of critical realism. I will also elaborate on the ontological position of the study and the possibilities and challenges of using critical realism as a tool for empirical research in the social sciences. While critical realism is not a substantive social

theory, it provides a key theoretical framework within which to advance our understanding of the social world because it focuses specifically on the explanations of the social and natural world (Bhaskar, 1989; Sayer, 1992). It is regarded as a philosophical approach that can act as an "under-labourer" for both the natural and social sciences. In practice therefore, critical realism has three major tenets: ontological realism, epistemological relativism and judgmental rationalism.

4.2.2 Ontology

Bhaskar (1978) proposed a three-dimensional conceptualisation of reality to understand the inner workings of a complex social world, consisting of the three domains of the real, the actual and the empirical, as shown in the below table and figure

Table 4.1: A stratified ontology (Brennan, 2016)

Domain	Entity
Empirical	Experiences and perceptions
Actual	Events and actions
Real	Structures, mechanisms, tendencies, powers

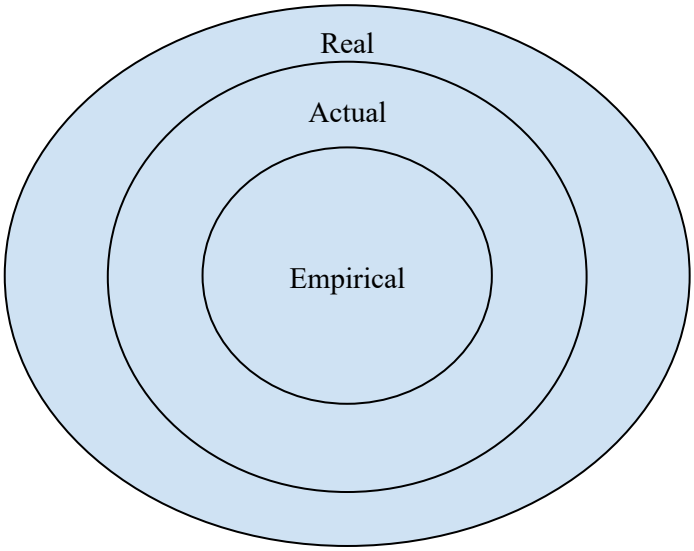

Figure 4.1: A graphical representation of Bhaskar's three domains of reality (Elder-Vass, 2006, p. 2)

This layered ontology is the methodological foundation of critical realism, focusing on the interplay of events, experiences, structures and mechanisms. This has fundamental implications for methodological considerations, as the aim of critical realist research centres on identifying and explaining the causal forces that operate at the deeper ontological levels instead of that which we experience. Bhaskar draws a distinction between the natural world as it is (intransitive) and our changing concepts of it (transitive). The transitive objects of knowledge are socially produced (mind-dependent) and include our theories and interpretations of the world (Bhaskar, 2013; Fletcher, 2017). This knowledge is a human construct and changes over time as new experiences occur and are researched/analysed, for example theories, models, facts, paradigms, speculations, linguistic conventions, beliefs, hunches, hypotheses, guesses and symbolic gestures.

The concept of a stratified ontology is what differentiates critical realism from other paradigms. The empirical domain comprises experience and observation and includes that which becomes known to humans through research, as well as theories that we create regarding natural and social phenomena (Danermark, Ekström, Jacobsen, & Karlsson, 2002). In practice this is the level at which all exploration must begin, starting from the things we see and experience. This layer is both relative and transitive, mainly because people experience or observe things differently. The second level, the actual, is the layer of events which we may or may not experience at all. The actual refers to events as they occur and not necessarily as they are experienced because what happens in the world is not equivalent to only that which is observed by humans (Bhaskar, 2008). The real is the deeper layer of reality comprising structures and mechanisms. A mechanism, according to Bhaskar, is a causal structure that can trigger events (1998). These mechanisms are relatively s**table** structures which are often triggered by the interplay of objects at the level of the real. Thus, generative mechanisms refer to the structures, powers and relations that explain how things work beneath the surface appearance (Fleetwood, 2009). Although they are usually not directly observable, generative mechanisms are real and can be identified through their effects. The mechanisms and structures are intransitive objects of inquiry – they exist and act independently of human beings and are knowable through investigation.

From a critical realist perspective, the world is not just composed of events, experiences, impressions and discourses, but also of underlying structures, powers and tendencies that exist, whether we observe or experience them or not. Although the underlying level may possess certain

powers and tendencies, they are not always manifest in experience, or necessarily realised. The world thus consists of more than events and experiences or discourses about them. The primary objective of critical realist research is to provide causal explanations at different levels by uncovering mechanisms and underlying structures, based on perceptions of empirical events (Wynn & Williams, 2012). The purpose of research is then to identify and illuminate the structures, powers, and tendencies that structure the course of events. Realists see social and cultural structures as having the power to be causally efficacious in that they enable some actions that would otherwise not be possible, while constraining other actions (Benton & Craib, 2001; Carter & New, 2004).

Explanation entails providing an account of those structures, powers and tendencies that have contributed to, or facilitated some already identified phenomenon of interest. Thus, reality is stratified with some layers immediately visible and others hidden. A good example would be human behaviour which is observable and is underpinned by other layers such as tacit belief systems, patterns of social interaction and organisational structures and deep and contingent causal mechanisms which, although imperceptible, lead to the patterns we see (Cochran-Smith et al., 2014). While we are only partially able to discern and understand the real domain and researchers may therefore not be able to access these structured mechanisms nor observe every aspect of them, it is still these real structures and mechanisms that generate phenomena (McEvoy & Richards, 2003; Zachariadis, Scott, & Barrett, 2010). A good example I came across in my research was that, during a focus group discussion with participants (event), I noticed that the four females out of the nine participants said very little, with some of them not contributing anything at all except introducing themselves, but the five male teacher candidates participated very confidently (observation/experience). To explain this situation, one would need to understand the causal mechanisms (the real) or powers that enabled or constrained some of the voices of interview participants. A critical realist explanation of social events is based on our understanding of these causal mechanisms and the effects they have on the events we experience. The goal of research (science) is to produce knowledge about those generative mechanisms and structures that produce phenomena. The stratified view of the world that is the foundation of critical realism enables the researcher to unpack and understand complex social phenomena and better articulate the many potential causes of observed social behaviours (Zachariadis et al., 2013).

In practice, the researcher must be able to separate these three levels in the process of analysing data and for that reason, the analysis usually requires robust methodological tools to provide a rigorous analysis that can distinguish the actual from the real (Fletcher, 2017).

4.2.3 Generative mechanisms

Unlike in the natural world, social structures are activity-dependent, meaning that causal mechanisms "exist only in virtue of the activities they govern and cannot be empirically identified independent of them" (Bhaskar, 1979, p. 48). In the critical realist analysis of causation therefore, social structures include social class, sex, age group, ethnic groups, organisations and institutions. The fundamental task of social research is to explain social phenomena by revealing the causal mechanisms which produce them. It is also important to note that, in critical realism, the actual and empirical are both surface phenomena and these do not constitute the totality of our reality. Events and processes, therefore, should be explained in terms of their structures and mechanisms (Chouliaraki & Fairclough, 1999). Because both the natural and social world are stratified, explanation of phenomena needs to move from the level of the happenings to be explained, to that of the mechanisms and structures that generate them (Bhaskar, 1989).

4.2.4 Emergence

In critical realism, emergence refers to "the way in which particular combinations of things, processes and practices in social life give rise to new emergent properties" (Carter & New, 2004, p. 7). Reality is constituted by hierarchically ordered levels where a lower level of social processes and practices create conditions for a higher level (Danermark et al., 2002). The higher level is not reducible to the lower level. At each level, generative mechanisms come together in unique ways to create new mechanisms that are not reducible to their component parts, giving rise to the concept of emergence (Danermark et al., 2002). For that reason, critical realism views causality as complex because a variety of conditions influence mechanisms in contingent ways. Thus, researchers should not look for strict regularities at the level of observable events, but semi-regular patterns and underlying causal mechanisms (Angus, 2012).

4.2.5 Open and closed systems

An open system refers to a social structure which is beyond our ability to control directly (Bhaskar 1979; Wynn & Williams, 2012), unlike a closed system where events occur under stable conditions in a controlled environment that allows investigations to be replicated. In an open system, the presence and configurations of social conditions are somewhat contingent (Sayer, 1992) and events emerge from the interplay of a myriad independent mechanisms that can sometimes operate simultaneously (Shipway, 2011). Therefore, fundamentally, critical realists disagree with the notion of constant conjunctions as opposed to tendencies in an open system. In an open system (like a social system), the presence of other contingently related mechanisms may often prevent correspondence between cause and effect. While causal powers are necessary tendencies, they may or may not always be activated to produce actual effects depending on conditions (Sayer, 1992). For the same reason, explanations of actual events and phenomena are not "mono-causal" or linear. Consequently, a social event "is not only dependent on the causal powers available within a social structure, but also on the continuously changing contextual conditions and the evolving properties of components within the structure" (Wynn & Williams, 2012, p. 793).

In a critical realist analysis of a social context, it is always important to recognise that social reality is complex, and mechanisms operate in an unbounded system. In addition, mechanisms exist on multiple levels, sometimes in total opposition to each other and emergence entails that they have distinctive properties which are not reducible to other mechanisms (Parlour & McCormack). As Hu (2018, p. 3) puts it:

> First, given the complex nature of social reality, investigations and research restricted to a single domain tend to be unsatisfactory. Researchers pursuing critical realist-based research need to identify structures, causal powers or mechanisms in the deeper domain of the real (Leca & Naccache, 2006) while paying attention to contingent conditions and connectedness between individuals.

Unlike research in the natural sciences where scientists are able to isolate causal mechanisms by conducting experiments under carefully controlled conditions (Bhaskar, 1989), social scientists have to use analytical tools to identify potential causal mechanisms where they occur.

As I undertook this study, I was cognisant of the fact that it was about an open system so, unlike in a closed system (positivist), controlled test situations were not possible. A realist approach offers an opportunity to investigate causal relationships without the need to control variables as in closed systems (Maxwell, 2012). Finally, because reality is stratified, it means horizontal and vertical explanations of mechanisms are possible, but they all must be understood within the contexts which are constitutive of their meaning (Sayer, 1992). The focus is on what makes things happen in the specific case in a situation. Because social objects have underlying structures that are real and have causal mechanisms that produce events, critical realists believe that it is important to examine deeper causal processes at work in the world by first abstracting the underlying causal powers, or causal mechanisms of the object under investigation and think conceptually about how they operate (Roberts, 2014).

4.2.6 Epistemological relativism

While the purpose of research is to uncover the truth about the world, researchers should always realise that all the conceptual models and propositions that comprise our current knowledge base are ultimately fallible and could be proved incorrect by subsequent inquiry (Easton, 2010; Zachariadis et al., 2010). Thus, the knowledge we hold at any given point represents "the best truth that we have for the moment" (Danermark et al., 2002, p. 23) but this knowledge is transitive and fallible and can be falsified once better explanations are found. Critical realism argues that reality has an objective existence beyond our knowledge and experience. Because of that, our knowledge of reality is therefore always incomplete and fallible because it is socially produced, historically situated and concept dependent and therefore relative (Danermark et al., 2002). In fact, because our understanding of our world is inevitably a construction from our own perspectives and standpoints, critical realism combines a realist ontology with an interpretive epistemology (Archer et al., 1998), accepting that any explanations are in a sense fundamentally interpretivist in character. As Easton (2010) says, critical realism is primarily an ontology, not an epistemology, but it accords with a relativist epistemology. Epistemological relativism does not only acknowledge the possibility of all knowledge being erroneous but recognises that knowledge is historically transient "acquiring its meaningfulness and value relative to the time, place and position of the knower" (Al-Amoudi & Willmott, 2011, p. 30). Critical realism posits a realist ontology that is of the existence of a world independent of researchers' knowledge of it, while at

the same time it holds a fallibilist epistemology that recognises that researchers' knowledge of the world is socially produced. Because what we know is not equal to what exists 'out there', knowledge claims can be challenged, and their merits assessed logically and empirically. The methodical implication of epistemological relativism in critical realism implies that our knowledge of the social world, and our interpretations, can be fallible (Bhaskar 1998; Wynn & Williams, 2012); therefore, our descriptions of an event may not be always entirely congruent, with the event (Hu, 2018).

Bhaskar contends that ontological realism can be combined and reconciled with epistemological relativism and judgemental rationality (Bhaskar, 1998), adding that these elements are standard features of critical realism, although often they are combined and reconciled in a variety of ways (Danermark et al., 2002; Porpora, 2015). For example, critical realism explicitly incorporates constructivist approaches in the production of knowledge (Clark, Lissel, & David, 2008; Nairn, 2012) in an approach in which meaning of an object is conferred upon an object through interaction with the object. Although initially in critical realism an object exists regardless of our knowledge of it, it is through interaction with the object that it comes to hold a particular meaning for people.

Knowledge is socially constructed and therefore historically, politically and culturally situated, thereby underscoring the value of context (Clark et al., 2008). This awareness was important for this study which sought to examine how inclusion was understood in three very disparate social and cultural contexts.

4.2.7 Judgmental rationality

Judgmental rationality is based on the idea that all knowledge is fallible but to different extents and that knowledge of reality is always "conceptually mediated" (Danermark et al., 2002, p. 10). From a critical realist perspective social reality is made up of social objects and structures that are relatively enduring and independent, and knowledge gained about them is understood to be partial and imperfect and therefore subject to change. Although knowledge as a product is socially and historically positioned and value laden, it is possible to choose some accounts over others. In weighing up explanations, critical realism accepts the possibility of judging between competing claims because, the fact is that to accept epistemic relativism is different from accepting

judgmental relativism. It is possible to see which competing theories have greater explanatory power. As Hu (2018) posits, judgemental rationality allows "researchers to evaluate and compare the explanatory power of different theoretical explanations, and, finally, to select theories which most accurately represent the 'domain of the real' given our existing knowledge" (pp. 118-139). In research, therefore, the theories that get us closer to understanding reality or to identify the mechanisms that cause social events, activities or other phenomena, are generated using rational judgement about these social events (Bhaskar, 1986, 2009; Norrie, 2010; Fletcher, 2017).

In critical realist ontology, all explanations of reality should be treated as fallible (Bhaskar, 1979), including the explanations provided by research participants and theorists and scientists. Both scientific explanations and experiential explanations should be potentially fallible, yet at the same time, it should be acknowledged that in critical realist research, participants' experiences and understandings can challenge existing scientific knowledge and theory (Egbo, 2005). Critical realist methodology places the emphasis on the potential for falsification that emerges from the distinction between the transitive and intransitive dimensions of reality.

In this study, it was always important to recognise that there may be discrepancies between social actors' perceptions of their world and the way the world really is and to acknowledge "the realist ontological view that appearance and essence are not identical" (Crinson, 2007, p. 37). Yet as Bhaskar argues, "in opposition to the positivist view, actors' accounts form the indispensable starting point of social inquiry" (1998, p. xvi). As I proceeded to analyse the data, I kept sight of the fact that the real structures and mechanisms that influenced the participants' understanding of inclusion would not simply be uncovered by interviewing people in depth about them. As Bhaskar (1978) argues, our understanding of the causal powers and generative mechanisms is not always based on our abilities to directly observe them but can be based on our abilities to observe their effects. However, through the observation of their effects, we can then apply our intellectual and perceptual skills to form our beliefs or conjectures about the existence of structures, causal powers and mechanisms in the domain of the real (Zachariadis et al., 2013).

4.3 The Critical in Critical Realism

The critical in critical realism arises from mainly two meanings: the uncovering of hidden meanings and the emancipatory nature of critical realism. Both purposes were important for this study.

Critical realism can be critical as a tool of deconstruction in the process of uncovering hidden meanings. By influencing methodology, whether as metatheory or philosophical underpinning, the role of critical realism is to uncover the dimensions of social reality that are hidden from us in various ways. By uncovering societal, psychological and political mechanisms, critical realism can potentially help us penetrate ideologies that seek to mask social realities, some of which may be oppressive and exploitative (Zembylas, 2006). Critical realist grounded research can be used to change the social world through the identification and deconstruction of operational social structures including attitudes, values, ideologies and discursive practices that oppress people (Elder-Vass, 2010; Porpora, 2016). In this study, critical realism provided a method of looking beneath the surface to understand the real mechanisms that shaped perceptions of inclusion and influenced its practice beyond the pronouncements of the interviewees. It became possible to look beyond the empirical and actual domains to learn more about the mechanisms that underpinned the relevant social interactions in the contexts I studied.

Furthermore, research based on a critical realist philosophy seeks to transform the social world through the identification and deconstruction of societal structures that promote social injustices including attitudes, values and ideologies. This is the emancipatory role of critical realism. As Scott (2010) observes, “adopting a critical approach necessarily implies that a thing is flawed or incomplete and therefore needs to be replaced by an alternative, which is not flawed or incomplete in the same way. An emancipatory agenda indicates progress towards a better world than currently exists” (p. 105). The function of research, among other things, is to challenge social institutions, public policies and practices to bring about progressive change (Zembylas, 2006). In this instance, understanding structures and mechanisms create the opportunity to enable change in the way inclusion is understood and practiced in the different contexts. Thus, social relations like institutionally and culturally defined duties and rights remain open for examination in research (de Souza, 2014) but if we want to understand and act upon the social world to effect change, we

should view the events in our social world, always being cognisant of the underlying structures and mechanisms from which they may have emerged.

While critical realism is not a social theory, it is not simply about "depth-explanations" that seek to gain knowledge about specific causal processes that affect the way we act and think (Bhaskar, 1986, 2009). Bhaskar (1986, 2009) argues that research should also be guided by a desire to rid society of unwanted determinations like poverty, hunger and so forth, by challenging ideas and forms of practice that are regarded as 'dominant' and oppressive. In this context then, emancipation refers to the task of subverting dominant ideas and practices to create possibilities for something new. In this way, Bhaskar's depth realism may be employed to illuminate oppressive social arrangements in the form of possibilities of isolation and lack of connection and other social disparities that can be experienced by many students in different educational settings.

Bhaskar's argument, therefore, is that critical realist research can and should produce critiques of dominant ideas and institutions (Bhaskar, 2009). As Egbo (2005) posits, we can only understand and transform the social world if we are able to identify the structures that impact on people's lives and the relationship between events and the underlying mechanisms – that is the structures, institutions, discourses, beliefs and values which underpin those events. Researchers work towards exposing and critiquing dominant policies that support oppressive social structures as well as using the knowledge generated to engender far-reaching reforms (Elder-Vass, 2010; Porpora, 2016). This is a kind of moral realism, the way that researchers offer, or plan to offer, alternative ways of being, based on the outcomes of their research (Patel & Pilgrim, 2018). This view is also supported by Bhaskar when he notes that "what is, is only one possible world, and that, moreover, always presupposes the possibility of other worlds" (Bhaskar, 2010, p. 23).

4.4 Critical Realism - Implications for this Study

The fact that critical realism is used as the under-labourer for this study has important methodological implications. The ontological insights discussed above are helpful for the researcher to understand the general features of the social world and some of the challenges that confront the potential knowledge claims they wish to make. The notion of a layered reality implies that as researchers, we do not get direct access to the reality that we set out to study unless we use

other means to uncover the dimensions of social reality that are hidden from the surface in various ways (Bhaskar, 2009). My understanding of critical realism helped me to start this scientific investigation from that awareness; that in a stratified social reality, what we experience or observe is at the level of the empirical, but these are just emergent properties of underlying causal mechanisms (Easton, 2010). As a researcher therefore, rather than basing my conclusions on the event regularities at the empirical level, I aimed to identify generative mechanisms in the domain of the real. At the same time, I always bore in mind that when studying open systems such as social reality, there are usually a multitude of mechanisms causally affecting what happens in the actual and empirical domain (Easton, 2010).

A good understanding of judgemental rationalism helps the researcher to make rational choices of theory (Isaksen, 2018). In practice, this is important for any researcher since in the research activity, choices have to be made about one theory over another. Judgemental rationalism enables the researcher to choose from existing knowledge which theoretical explanation is closest to the meaning of the phenomenon in relation, of course, to issues of context and other hermeneutic considerations. Judgemental rationalism provides a rational way of evaluating and comparing the explanatory power of different explanations (Hu, 2018).

Finally, it was also important to approach this study in the full awareness that the reality of all research is that "there is no way of knowing the world except under particular, more or less historically transient descriptions" (Bhaskar, 2009, p. 99). For that reason, the realist approach has an explicit focus on how objects work in relation to their context and acknowledges that structures and institutions of society do often have a bearing on research outcomes (Sayer, 2000). Such an understanding of this element of critical realism (epistemic relativism) helped me as a researcher to be more aware and more reflective about the complex relationship between the institutions and the participants under study, and the reality in which both existed (Isaksen, 2018). In addition, it was also beneficial to be aware that meaning is not only externally descriptive of phenomena but constitutive of them.

Using the ontological depth of critical realism involved looking for explanations that could allow an understanding of inclusion, by examining the structures and the underlying processes that related to the construction of notions of inclusion. As Cochran-Smith et al. (2014) argue, "because

critical realism conceptualises individual reasons and meanings as part of the real world, this means that beliefs, perceptions and interpretations can be studied as underlying causal mechanisms in interaction and conjunction with other causes" (p. 11). Such explanations involved searching for participants' reasons for action or non-action and searching for social and structural rules operating in that context within which reasons given made sense. It is also important to understand the social structures that generate and maintain these rules and perpetuate them (Sayer, 1992). In this instance, the different teacher educators who were interviewed gave their views about inclusion and the reasons why they understood inclusion in their different or similar ways. Through examining their interpretations of this concept and analysing the meaning they ascribed to it, and how these related to the different contexts in which the participants existed, I was able to develop an in-depth and critical understanding of the emergence of the social practices of inclusion.

4.5 Fraser's Theory of Social Justice

4.5.1 Participation parity

Fraser's theory posits that social justice "requires social arrangements that permit all to participate as peers in social life. Overcoming injustice means dismantling institutionalised obstacles that prevent some people from participating on a par with others as full partners in social interaction" (Fraser, 2008, p. 16). Fraser and Honneth use the term 'participatory parity' to describe the just allocation of "social arrangements that permit all members of society to interact with one another as peers" (2003, p. 36). In her conceptualisation, the principle of participation parity is the one normative standard of justice that should be applied across all three social realms of culture, economy and politics (Fraser, 2005). Instead of requiring individuals to conform to dominant norms, Fraser suggests that a just theory of inclusion must preserve difference by securing external conditions and structures that will allow diverse individuals to participate on a relatively equal playing field (Knight, 2015).

For this to be achieved, Fraser (2008, 2009) puts forward a three-dimensional theory which would enhance people's ability to interact as equals. What this means is that fair participation is only possible under certain conditions. Fraser has focused on a three-dimensional theory of justice centred on the master frames of redistribution, recognition and representation (Fraser, 2005). The

first frame, redistribution, seeks to address injustice in the economic structure of society, including exploitation, economic marginalisation and deprivation, through the remedy of economic restructuring. The second one is recognition which seeks to address injustice in the cultural order of society – that is, in the social patterns of interpretation, evaluation and communication – including cultural domination, non-recognition and disrespect, by pursuing cultural or symbolic change (Fraser & Honneth, 2003, p. 13). Lastly, Fraser has expanded her theory to include representation, which seeks to address injustice in the political dimension of society. The three dimensions are not completely autonomous from each other but rather "stand in relations of mutual entwinement and reciprocal influence" (Fraser, 2005, p. 79). Social struggles in the contemporary world should understand that there is "no recognition without redistribution, no redistribution or recognition without representation" (Fraser, 2005, p. 79). These three dimensions of justice should be understood in terms of representing ways of bringing disparities of social participation to public prominence (Fraser, 2005).

First, redistribution is the claim for a more just distribution of resources and wealth. This economic dimension refers to the disparity in the distribution of resources and therefore seeks to address injustice in the economic structure of society including exploitation and economic marginalisation. In education for example, schools continue to perpetuate class disadvantage through the inequitable distribution of educational material resources. Fraser recognises that, because economic inequality undermines an individual's capacity to participate on par with their peers, some degree of economic redistribution is a necessary precondition as this tends to affect an individual's many other capabilities like health and education for example. In this distributive paradigm, therefore, social justice is only possible through the equal distribution of goods, services and benefits, but there are two major problems with the reduction of social justice to the distribution of goods.

First, such an approach hides the institutional and social contexts that determine that distribution, and secondly, the paradigm "represents goods as if they were static objects instead of relationships and social processes" (Young, 2000, p. 33). The meritocratic model of equal opportunity presupposes, in order to be fair, a perfectly equal and objective school offering. It ignores the students' social inequalities and, in the end, holds students accountable for their own failure given that, supposedly, school gave them, like anyone else, every opportunity to succeed.

Recognition, which is the second reparative mechanism is about social and cultural injustices. These injustices include cultural domination (being subjected to patterns of communication associated with another culture that are alien and/or hostile to one's own), non-recognition (being rendered invisible by means of the authoritative representational, communicative, and interpretive practices of a culture), and disrespect (being routinely maligned or disparaged in stereotypical public cultural representations or in everyday life interactions (Fernandez, 2011). Recognition is often seen as a structural change meant to compensate for status subordination. Essentially, it is an overarching moral category which seeks to address injustice in the cultural order of society including the social patterns of interpretation, along with cultural domination, non-recognition and disrespect by pushing for symbolic change (Fraser & Honneth, 2003).The issue in recognition primarily, is that it is simply unjust that some individuals and groups are denied status of full partnership in social interaction (Fraser, 2005). This view of recognition partly comes from the realisation that not all injustice and inequality have to do with socio-economic factors, but with social and cultural structures that generate relations of exclusion, oppression and inequality. Recognition focuses on the actors, their identity configurations and the way in which certain institutionalised patterns of cultural value constitute some actors as inferior, excluded, wholly other, or simply invisible, hence less than full partners in social interaction. Instead of inequalities being explained by problems of distribution (distribution paradigm), inequality and injustice appear in different dimensions of human experience. The assumption is that, due recognition is a vital human need and all identity positions deserve recognition just as each person deserves dignity (Taylor, 1994). As Taylor (1994) asserts, “Our identity is partly shaped by recognition or its absence, often by misrecognition of others, and so a person or group of people can suffer real damage, real distortion if the people or society mirror back to them a confining or demeaning or contemptible picture of themselves” (p. 27).

Ultimately, all these social constructions result in degrading cultural representations which undermine the ability of others to participate equally. There is a need therefore for “institutionalised patterns of cultural value which express equal respect for all participants and ensure equal opportunity for achieving social esteem. It (must) preclude institutionalised norms that systematically depreciate some categories of people and qualities associated with them whether by burdening them with excessive ascribed ‘difference’ or by failing to acknowledge their

distinctiveness" (Fraser & Honneth, 2003, p. 36). The recognition paradigm for justice targets injustices that are construed as cultural; those that are rooted in social patterns of representation, interpretation and communication. Such injustices include cultural domination as being required to assimilate, non-recognition as in being rendered invisible, and disrespect as in being routinely maligned (Fraser & Honneth, 2003). For example, in education in many countries today, existing institutionalised patterns of cultural value marginalise 'other' ways of knowing and being, such as knowledge of indigenous peoples. Because recognition is a matter of discourse, it is granted differently from economic justice that is adjudicated by the allocation of goods. Instead "recognition is granted by the tone and tenor of what is written and spoken" (Bingham, 2006, p. 328). As Bingham (2006, p. 328) concludes, "recognition justice is about the discursive ways that people are received rather than the economic goods that people are given".

The third mechanism is the political dimension which refers to representation which enables people to have a voice (political voice). Representation as part of the social justice framework includes measures to redress political subordination and incapacity and the procedures that structure public processes of contestation and inclusion or exclusion in such processes (Fraser, 2008; Bozalek & Boughey, 2012). It is the empowerment of subordinated groups or individuals, recognising their fundamental human right to be represented and have a say in the decisions that affect them and their lives. The remedy includes upwardly revaluing disrespected identities and the cultural products of maligned groups and transforming the entire societal patterns of representation, interpretation and communication in ways that would change everybody's social identity (Fraser, 2005). Thus, the lifting of formal restrictions on public sphere participation alone does not suffice to ensure inclusion in practice. (Fraser, 2005). One of Fraser's concerns seems to be that unequal social and cultural positioning can create informal barriers to inclusion by unfairly influencing which issues are appropriate for public debate and when decision-making should take place. An inclusive approach should therefore enhance opportunities for self-development and self-expression and encourage participation of such groups in decision-making through group representation.

While social justice is a contentious and contested concept whose meaning may vary according to different perspectives, in Fraser's conceptual framework for understanding justice / injustice, the normative standard that must be applied across all the three dimensions is the principle of

participation parity. At the heart of participation parity is creation of equality by removing the existing arrangements of domination and removing the entrenched distinctly Western normative order as the overarching authority on the political landscape. Equality of conditions is a central criterion of justice in education as it draws attention to the need for social and economic policies which recognise the need for all persons to have capacities, time and resources to maintain and nurture relationships that enable them to lead human and flourishing lives.

4.5.2 Implications for this study

Fraser's theory is a productive lens for thinking about and addressing key ways to achieve inclusion and represents a robust framework for analysing inclusion as an aspect of social justice (Keddie, 2012). It is also an effective theoretical perspective that can be used to recognise disadvantages and inequities in vulnerable groups (Fernandez, 2011). The advantage of a social justice lens is an awareness of factors that affect an individual's ability to participate at par with peers (Danermark & Gellerstedt, 2004). Thus an analysis of inclusion can be effectively undertaken using Fraser's framework of redistribution, recognition and representation to identify how some groups are situated in relation to others. Each of these dimensions of social justice corresponds to an analytically distinct aspect of the social order, as well as to an analytically distinct form of injustice (Conway & Singh, 2009). As Danermark and Gellerstedt (2004) argue, Fraser's theory can be used to analyse and explore issues of inclusion because participation parity is its guiding principle and its yardstick for intervention measures.

When inclusion refers to all the things that we do to challenge power inequities and practices that marginalise and exclude some students on the basis of their developmental trajectories or their biographical histories, participatory parity as a normative guideline becomes a more suitable framework for analysing and understanding inclusion (Edmunds & Macmillan, 2010). Because this analytical scheme includes both socio-economic as well as cultural and political injustices, it is possible to incorporate the complexities of intersecting inequalities, as well as propose remedies for the injustices (Fernandez, 2011). Fraser's conceptualisation of justice does not only offer useful insights into understanding the views and practices of inclusion, it is one of the many useful and powerful lenses that can be used to help comprehend the complex equity issues that pervade schooling landscapes today (Keddie, 2012). As Keddie (2012) puts it, "Fraser's theory, while not

unproblematic, provides a comprehensive and multi-dimensional approach to navigating through some of the 'chaos' of justice issues in education and move towards greater economic, cultural and political parity for all" (p. 277).

A social justice framework enables us to describe individual understandings of inclusion, as well as the dominant institutional realities and policy priorities that indicate the extent to which there is commitment to the process of inclusion (Liasidou & Antoniou, 2015).

In view of Fraser's theory, therefore, the questions that this study has to answer include the following:

- What are the conceptions of inclusion that emerge from the data?
- In the views of the participants, what are the structural mechanisms that would enable parity of participation in the different contexts?

In this critical realist study, Fraser's theory of justice offers a useful theoretical framework within which to conceptualise the mechanisms of social injustice in institutional settings and to make meaningful judgments about educational policies and practices. This theory becomes part of the transitive dimension that can be used as a lens to understand the concept of inclusion. Part of the resonance between critical realism and Fraser's social justice theory, is that this social justice theory provides a justice-based notion of inclusion which is consistent with the emancipatory goal of critical realism. It can illuminate the many complex contextual factors and identify the relevant political policies and institutional structures and practices that influence understandings of inclusion. Frazer's social justice theory provides a framework within which to explore inclusion, as social justice from the perspective of teacher educators in the social and cultural context in which teacher education takes place. In this elaboration, participatory parity is used as the normative democratic guideline which is a good starting point to understand inclusion. Critical realism offers a coherent position from which to make connections between social action and social justice (Judd, 2013). Explanations of social justice discourses like relational justice concerned with equity in all aspects of social and economic life and cultural recognition, exist in specific historical and sociocultural contexts so they inevitably need to draw on the levels of the real like economic and status orders. As Pendlebury (1998) posits, "Teaching and teacher

education, like other social practices, occur within particular spatio-temporal settings that are partly constitutive of the actions and interactions that take place within them" (p. 337). The researcher needs to understand the existing structures and the powers and relations beneath the surface in order to identify and critique the injustices they carry (Judd, 2013). Fraser's theory elaborates an analytical scheme that aims at including socio-economic and cultural forms of injustice expressed as participation parity (Fraser, 2000, 2001). Using critical realism as a metatheoretical perspective allows the analysis of the different levels of reality.

As explained earlier, the core of critical realism is the world conceptualised as stratified, with mechanisms working at various levels, generating a range of outcomes in different contexts (Danermark et al., 2002). This view of reality becomes important in this research because, a good understanding of inclusion would not come as a result of just the narratives of the participants. There is a need to recognise that inclusion would be better understood by taking the different levels, mechanisms and contexts into account, understanding that injustices are generated by both socio-economic mechanisms and cultural mechanisms. As Pereira argues, teachers' professional practice should involve "not only teaching methods and pedagogical strategies but also teachers' beliefs and representations about their work, their perspectives on the social world and the socio-cultural and human diversity and their ethical commitment and attitude towards educational and social inequalities" (2013, p. 16).

4.6 Tronto's Ethic of Care

An ethic of care refers to a moral disposition and a set of moral sensibilities, issues and practices that arise from taking seriously the fact that care is a central aspect of human existence (Tronto, 1993). This ethic is guided by a fully relational ontology in which individuals are implicated in the lives of other individuals through participation in institutions and social structures (Robinson, 2014). An ethic of care involves a moral concept that emphasises responsibilities and relationships rather than rules and rights and adversarialism and is subsumed under the higher principles of nurturance and trust because persons are conceptualised as relational and not autonomous. The result is human reciprocity based on characteristics of nurturing and dependency in place of competition and autonomy. According to Sevenhuijsen (2003a), the ethic of care "departs from the individualistic image of human nature that underlies neoliberal policy programs and instead

starts from notions of relationality and interdependence – the basic idea that humans are engaged in each other's lives in a myriad of ways" (p. 315). What makes care an element of the human condition is "the recognition that all people are vulnerable, dependent and finite, and that we all have to find ways of dealing with this in our daily existence and in the values, which guide our individual and collective behaviour" (Sevenhuijsen, 1998, p. 28).

The feminist ethic of care originated as a theoretical framework to highlight the moral dimensions of care and caring relationships by conceptualising 'care' as a political value (Tronto, 1993). It has also provided an alternative framework to understand the ways in which people make decisions about policies and practice relating to inclusion. While care work is gendered, an ethic of care is a more general stance that is not limited to the practices of women (Corkburn, 2005). An ethic of care framework offers context-specific ways of understanding and responding to the relational aspects of inclusion (Ward & Gahagan, 2010). Context is crucial to the ethic of care because our world consists of networks of relationships with peers, teachers and friends. Attention to context, therefore, enables recognition of one's life world in the present, based on the context of one's social networks and one's immediate needs and identities (Corkburn, 2005). To achieve social justice, the starting point must be the conviction that giving and receiving care is fundamental to all interdependent human lives. This relatedness has policy implications in terms of poverty and inequality because it draws attention to social and economic policies which recognise the need for all persons to have capacities, time and resources to maintain and nurture relationships that enable them to lead human and flourishing lives (Robinson, 2005). An approach to social justice based on a political ethic of care 'contextualises' the human condition to focus on the wider social, economic and political concepts in which claims for justice, rights and interests arise, and because of that, it can give new meaning and significance to human differences arising from gender, class, race, ethnicity, sexuality, ability and geographical location (Robinson, 2005). In this case, care is not located specifically in families or dyadic relationships but viewed as holistic and as a broad public and political activity (Tronto, 2010).

The political ethic of care has five dimensions, each with a corresponding moral value. According to Tronto (1993), the core values of the ethic of care are attentiveness (this refers to recognition of the need of care), responsibility (ensuring that something is done once the need for care has been established), competence (guaranteeing that caregivers have adequate resources for care-giving

to occur), responsiveness (to make sure the actual care provided corresponds with the needs and views of the care receivers), and trust (letting someone take care of something one values). These values of care can go a long way to help us deal with issues of diversity and inequality and to make better judgements about what should be considered valuable and relevant to us all (Sevenhuijsen, 1998).

Attentiveness involves recognition that there is a need for care and making the assessment that this need should be met. In the context of educational institutions for example, there should always be recognition that there are marginalised others among us and that there is examination of the power relations involved; it involves an understanding of the caring needs others might have, since recognising a need considers the uniqueness of each person's position (Tronto, 1993; Zembylas & Bozalek, 2011). The people who design teacher education programmes would refine programme insights about what the problem is, as experienced by those that are excluded – being attentive to the actual needs of those that are marginalised and paying attention. Failure to recognise the needs of others, or ignoring them, or being insufficiently attentive would be a moral failure (Tronto, 1993). According to Young (2000), attentiveness is often achieved through dialogue and acknowledging that each one of us is differently located economically, socially, and culturally, with different life experiences, assumptions and frames of reference. While we are all different and positioned differently, recognising the uniqueness of others can lead to mutual acceptance and understanding, as well as respect for diversity (Robinson, 2005).

In addition to attentiveness, the ethic of care also includes the values of responsibility and responsiveness. Taking care of an identified need requires taking responsibility for the identified need. Responsibility goes beyond obligation and duty to focus on what needs to be done to contribute to the situation. As Tronto says, responsibility is "embedded in a set of implicit cultural practices, rather than a set of rules or series of promises" (1993, p. 132). For the caregiver, the motivating impetus is not obligation; it is responsibility. Responsiveness represents a different way of understanding the needs of others and refers especially to the care receiver's response to care. Because of the inherent vulnerability of receiving care, responsiveness also refers to the need for a deep and thoughtful knowledge of the situation and of the actor's situation and needs. Sometimes too much care can create dependency in those being cared for. As Tronto (1993) aptly explains,

"The moral precept of responsiveness requires that we remain alert to the possibilities for abuse that arise with vulnerability" (1993, p. 135).

Care also requires competence and trust. Competence refers to the moral aspect of making sure that care work is done completely through competent execution (Tronto, 1993). The caregiver should ensure that the care needs are adequately met. It is important to note that caring competence requires adequate resources including material resources, time and sometimes skills (Zembylas, 2010). Competence therefore places responsibility with decision-makers to optimally make resources available for care to be possible. Trust on the other hand refers to letting others take care of something the 'truster' cares about. According to Baier (2003, p. 604), "trust is not the same as mere dependency or reliance on others. To trust is to let someone take care of something one values where taking care involves discretionary powers". Trust evolves around willingness to establish and sustain connections even when aversion, mistrust or fear of the unknown could have existed in the beginning and a willingness and ability to recognise the dependence and vulnerability of oneself and others. The dependency and vulnerability of those who need care or receive care morally demand that those who give care, act responsibly and competently in order to promote trust in the caring relationship. Social policies that are put in place should support the actual caring practices and take seriously the moral presumptions and competence of the people engaged in care. Thus, the ethic of care overall, involves more than just the experience of an affective state; it involves competent action and sometimes collective action.

4.6.1 Implications for this study

As an analytical framework, Tronto's political ethic of care can be invoked within very different discourses to provide insight into practices of organisations (Tronto, 1993). It has been elaborated to critique the normative notions of independence, autonomy and responsibility in social and welfare policy discourses (Sevenhuijsen, 1998, 2003b) and it has also been applied to question the framework of citizenship, participation and social justice predicated on individual rights and responsibilities embedded in current government policies (Barnes, 2006). It is important to note that unlike Fraser's theory of justice, Tronto's ethic of care is not a substantive theory but it can provide a different perspective to understanding different discourses. In this study, I examined what an ethic of care could offer to discussions about inclusion as understood and practiced in the

three higher education programmes. The objective was to utilise the political ethic of care to provide a holistic framework from which judgments could be made about how well teacher educators and the curricula at their disposal have embraced educational inclusion. This framework has implications for how inclusion is understood and practiced in institutions of higher learning.

Apart from the justice-based notions of inclusion associated with a social justice theory, an ethic of care brings a moral voice concerned with particular situations and actual individuals involved in educational institutions. A political ethic of care offers possibilities of a different understanding of inclusion as being centrally concerned with compassion and care, through an examination of care that is ungendered, contextual and inclusive of both the private and the public spheres of life (Tronto, 1993). Such a perspective pays more attention to the particularities of voice and the constructions that constitute the points of view of those who would not normally get attention. This is particularly important in the contemporary global processes that continue to side-line the broader moral and social purposes of schooling (Rizvi & Lingard, 2009). An ethic of care framework has the potential to provide context-specific ways of understanding and responding to the different inequities that arise as a result of the increasing levels of ethnic and class diversity in today's classrooms (Keddie, 2012).

As a normative framework, the value of an ethic of care is that it brings in public and political dimensions which are often underplayed in the approaches of other care ethicists (Bozalek, McMillan, Marshall, November, Daniels, & Sylvester, 2014). An ethic of care provides "an important lens through which to make situated judgements about collective commitments and individual responsibilities" (Williams, 2001, p. 478). This study used the political ethic of care as developed by Sevenhuijsen (1998) and Tronto (1993) to reflect on how an ethic of care framework, based on the interconnected principles of attentiveness, responsibility, competence, responsiveness and trust, can be applied to understandings and practices of inclusion in higher education contexts. Care is not just a moral concept but a political concept through which we can make judgements about the public world (Tronto, 1993). Thus, other than just showing what things ought to be, this normative framework also brings out the values which underpin practices and policies (Robinson, 1999). Other than help us to rethink humans as interdependent beings, "care can serve as a strategic concept to involve the relatively disenfranchised in the political world" (Tronto, 1993, p. 21). Existing policies and practices are greatly influenced by dominant discourses like neo-liberalism

and its emphasis on individualism and competition. Using the ethic of care framework enables a focus on the importance of relationality and vulnerability and sensitises us to differential power relations. An ethic of care "recognises that vulnerability is a human condition and that some people are constituted as more or less vulnerable than others at different times and in different places" (Williams, 2001, p. 487). It is therefore important to explore how and why values based in a relational ontology develop in different contexts, and what they mean to people who are differently positioned within socio-cultural systems. An ethic of care framework offers context specific ways through which we can analyse what structures and patterns of relationships maintain unequal power.

In a study that is underpinned by a critical realist philosophy, context is critically significant. The relational conception of society proposed in critical realism offers more opportunities to investigate power distributions in social cultural relations (de Souza, 2014). Critical realism also places emphasis on the social worlds and organisations in which individuals are embedded, as well as the discursive practices through which power relations are mediated. Understanding context is key in effectively deconstructing social policies, as much as in evaluating participants' experiences and analysing higher education institutional policies and practices. The individuals and institutions under study were all differently located economically, socially and culturally, with different life histories, experiences, assumptions and frames of reference. In terms of qualitative data, an ethic of care assumes that needs and narratives are not taken as absolute but are located, interpreted and judged in specific contexts. This contradicts the view of abstract models which suggest that ethical judgements are objective and rational and therefore do not depend on the affective aspects of experience. Abstract models fail to recognise that in real life, our lives are characterised by meaningful and real relationships with others. Thus, in particular, an ethic of care emphasises the significance of context and the particularities of circumstances and must always attend to the embeddedness of care in a wider cultural and political context (Tronto, 2010). For example, in this study, the narratives from the participants and their views on inclusion can only be better understood in the context in which the participants experienced educational practice. At the same time, it is important that a critical realist position continually acknowledges the complexity and influences of different elements at the real level of a stratified ontology that include politics, policies, culture and family structure.

4.7 Conclusion

This chapter presented and explained the three major theoretical frameworks that were used in this study. I also demonstrated how both Fraser's social justice theory and Tronto's ethic of care normative framework were compatible with critical realism as a metatheory. As will be demonstrated in the discussion chapters, both frameworks were brought to use throughout as interpretive lenses.

CHAPTER FIVE: METHODOLOGY AND METHODS

5.1 Introduction

In this chapter I will discuss the research design and methodology of this study. In this context, methodology refers to the established research paradigm in a particular discipline or "a philosophical framework" that guides a study (Collis & Hussey, 2009, p. 55). I will also discuss the specific data collection methods selected for this study and the techniques that were used to analyse the data. Finally, issues pertaining to ethics, validity and reliability will also be examined.

5.2 Paradigm and Research Design

A paradigm refers to the coherent group of methodologies that complement one another and can work well with each other to deliver data and findings that will reflect the research question and suit the research purpose, while methods refer to those techniques adopted to collect data about an object of inquiry (Quinn, 2006), for example questionnaires or interviews and document study as were used in this research. Methodology also provides the orientation to the study and examines the logic and rationale which underpin the use of methods (De Vos, Strydom, Fouche, & Delport, 2011; Neuman, 2011). In selecting a research methodology, "it is proper to select that paradigm whose assumptions are best met by phenomena being investigated" (Guba, 1981, p. 76). The purpose of a research design in this case was to provide the framework which guided the methods and decisions I made, and it also foregrounded the basis for interpretation and analysis in the end (Neuman, 2011).

In principle, research design provides a plan that enables the researcher to anticipate the appropriate research methods which can contribute to a high degree of validity of the final result (Babbie & Mouton, 2008). As already highlighted in the previous chapter (see Section 4.1), all research is founded on some underlying philosophical theory addressing issues about what constitutes 'valid' research, and which research methods are appropriate for the development of knowledge in a study. I shall briefly describe the epistemological, theoretical and methodological differences between qualitative (Yilmaz, 2013) and quantitative research and demonstrate why I

found the philosophical assumptions underlying the qualitative method more suitable for this study as it tied in well with critical realism.

5.2.1 Qualitative and quantitative research

The roots of qualitative and quantitative approaches originate from different philosophical paradigms, namely positivism and postpositivism (Creswell, 2012; Neuman, 2006), but in practice, the difference between the two approaches is more in terms of suitability than intrinsic 'betterness', and the suitability of either paradigm is determined by the context, purpose and nature of the research study in question (De Vos et al., 2011). Essentially, however, positivists believe an objective reality exists outside personal experiences. In a research context therefore, objectivity is defined in terms of the researcher's detachment from the social world, as well as the accuracy of their data collecting instruments, meaning that there is a world out there which can be recorded and analysed independent of people's interpretation of it. A researcher can adopt a distant, detached, neutral and non-interactive position, a position which enables them to assume the role of objective analyst, making detached interpretations about data (Yilmaz, 2013). Thus, in the philosophy of science, "the positivist position most approximates that of traditional quantitative world-views, with an emphasis on discovering a single truth, using outside verification, striving for objectivity and holding the researcher's values at bay" (Williams & Morrow, 2009, p. 577).

On the other hand, the interpretivist paradigm can be traced back to Max Weber (1864-1920). Weber maintained that all humans are attempting to make sense of their world, so they continuously attempt to interpret, create, give meaning, define, justify and rationalise daily actions (Babbie & Mouton, 2008). Thus, social reality is subjective and nuanced because it is shaped by the perceptions of individuals as well as, in research, the aims and values of the researcher. The aim of social research then is understanding and interpreting everyday events, experiences and social structures, as well as the values people attach to these phenomena (Collis & Hussey, 2009). As Myers (2009) argues, qualitative research is designed to help researchers understand people, and the social and cultural contexts within which they live and aims to explore and discover the issues about a problem at hand.

Qualitative research is more about process than outcome. As Maxwell (2012) explains, its purpose is to understand the process by which events and actions take place and then generate new, grounded theories about them and develop causal explanations. As in the instance of this study where the goal was to achieve a deeper understanding of how educators think about inclusion as an aspect of social justice and the extent to which the understanding of inclusion informs teacher educator practice, the goal was to describe in detail the perspectives of the research participants which made the qualitative method more ideal. The real interest was in how participants made sense of their experiences and how these perspectives informed their actions (Maxwell, 2012). As Sayer says, "meaning has to be understood, it cannot be measured or counted, and hence there is always an interpretive or hermeneutic element in social science" (2000, p. 17).

5.2.2 Critical realism in a qualitative study

The purpose of this study was to examine conceptualisations and practices of inclusion in teacher education programmes. For that reason, this study adopted a qualitative methodology. At the same time, placing the study in a critical realist frame made it possible to identify the underlying mechanisms at play in the institutional structures and how they influenced conceptualisation and practice of inclusion in education.

There are several ways in which qualitative research is more compatible with a realist view of causation (Maxwell, 2012). Critical realism accepts the existence of a reality independent of human beliefs and behaviour and holds that there are social processes and forces beyond the control of humans which affect their beliefs and behaviour (Sayer, 2012). Realists argue that mental events and processes are real phenomena that can be causes of behaviour; in the same way, qualitative researchers insist on the importance of meaning and intention in explaining social phenomena and the essentially interpretive nature of these understandings (Maxwell, 2012). Maxwell (2012) adds further that as realists do not believe that causal explanations are inherently dependent of pre-established comparisons, qualitative researchers legitimately use flexible and inductive design methods. The purpose of inquiry is understanding and constructing knowledge as opposed to discovering knowledge. The understanding of the social situation is derived from the participant's perspective. Consistent with critical realism, the constructed knowledge is not absolute truth that remains stable and generalisable across all possible contexts, but it is a socio-

historical artefact (Fletcher, 2017) which exists within specific contexts and perspectives. In critical realism, all knowledge is viewed as fallible because our knowledge of the world is not identical to the world as such, it is concept dependent; it is socially determined and changeable. Furthermore, Maxwell (2004, p. 7) argues that the "meanings, beliefs, values and intentions held by participants in a study are essential parts of causal mechanisms operating in that setting". Even if these perceptions of participants would turn out to be untrue or unreliable, they are 'real' in that they may affect practice (Danermark et al., 2002). In the focus group interviews for example, it was evident that, even if some of the participants' views were based on inaccurate assumptions, they still affected how the participants experienced the teacher education programme.

The realist paradigm also influences how research questions are framed (Maxwell, 2012). Unlike in a positivist approach where questions are instrumental and therefore formulated in terms of observable or measurable data in order to address validity concerns at all times (Yardley, 2017), realist research questions are about experiences, feelings, beliefs and intentions and they do not need to be reduced to only what can be directly measured. In addition, a qualitative study works better with process questions rather than variance questions which focus on difference and correlation instead of how things happen. Process questions are "about the meaning of events and activities to people who are involved in these, and questions about the physical and social context of these events and activities" (Maxwell, 1996, p. 59).

To illustrate causation in social research, the critical realist seeks "a thick explanation" (Fleetwood & Hesketh, 2010). This is a kind of explanation that requires hermeneutic information. Hermeneutic information relates to a wide range of human cognitive activities such as understanding, intention, purpose, meaning and interpretation. This is where qualitative processes like interviews become important in order to produce causal accounts of events by probing the agents' own understandings of causal relations in organisational contexts (Fleetwood & Hesketh, 2010). Bhaskar (2016) argues that hermeneutically based methodologies used in qualitative research are the starting point of critical realist research in the social sciences primarily because, unlike in the natural sciences, language provides an 'inside' or 'interior' view of social life (p. 57). The 'interior' that language provides can only be engaged with hermeneutically, that is, by focusing on meaning. In this way, critical realism understandably achieves more metatheoretical compatibility with qualitative research than with quantitative research. Ackroyd and Fleetwood

(2004) add that, in critical realism, the rejection of positivist preoccupation with prediction and quantitative measurement makes qualitative methods more amenable to understanding social events than non-hermeneutic measurements and statistics. In this study, the focus on meaning was achieved both through the literature review that explored what other researchers have thought and through the interviews that were conducted that focused on research participants' lived experiences and understandings of inclusion.

5.3 Research Process: Choosing Study Sites

The research sites for this study were situated in three countries – Canada, South Africa and Zimbabwe. As indicated earlier, the study included three institutions in the three countries. The investigations into teacher education in one university in each country provided insights into how the issue of inclusion is understood and practiced in the different national and institutional contexts. It should be noted that the complexity of the process of conducting interviews (both individual and group) across three continents can never be underestimated. I had, however, in place a good network of communication with the targeted university in Canada where I lived and in Zimbabwe which is still virtually home. I was also able to establish a communication network with an acquaintance at the South African university who later assisted me to locate a key agent who ultimately facilitated access to participants and documents.

My study focused on the individual teacher educators' understandings and enactments of inclusion as an aspect of social justice in teacher education. I deliberately sought institutions and participants from different geographical locations in order to get a diversity of political-social contexts where inclusion was an important issue. The three institutions were both purposively and strategically selected. Purposively; because all three institutions were involved in teacher education and therefore constituted particular settings or events consciously chosen because they provide important information that could not be obtained from any other settings (Maxwell, 2012) and in my own judgement, they had the highest potential of providing "rich" information. All the institutions had modules that dealt with issues about inclusion. The choice was also strategic logistically, in that the South African location would be easily reachable and the Zimbabwean location is in my original home country which I visit twice every year, while the Canadian location

was in the city I was living in. While the idea of doing research in three countries might have looked daunting initially, in practice there was very little in the form of logistical challenges.

5.3.1 Study population

The study population included teacher educators and teacher candidates, or as others would like to call them, pre-service teachers. The teacher educators provided data on the conceptualisations and understandings of the concept of inclusion as an aspect of social justice and the practice of inclusion in their different institutions, while the pre-service teachers would provide their own understandings of inclusion and the experience (or absence) of it. The method used to select the participants for these interviews was purposive sampling.

5.3.2 Sampling

Sampling refers to the process of selecting a subset of persons or things from a larger population – also called a sampling frame (Neuman, 2011). It is defined by Maxwell (1997, p. 87) as a type of sampling in which "particular settings, persons, or events are deliberately selected for the important information they can provide that cannot be gotten as well from other choices". It involves selecting certain units or cases based on specific purposes, rather than randomly as in probability samples (Teddlie, 2007). A purposive sample is typically designed to pick a small number of participants that will yield the most information about a phenomenon. It is unlike a probability sample which is designed to select many cases that are collectively representative of the population of interest. For example, in this case, only three teacher educators were initially selected from each institution. A purposive sample is thus a non-probability sample selected based on the objective of the study and the characteristics of a sample universe (Patton, 2002). In this sampling method, which is also known as judgmental sampling, I selected what I considered, in my own judgement, to be the most "information-rich" cases from a sample frame for in-depth-study (Teddlie & Yu, 2007). The rationale was that from their a-priori understanding of the topic under study, I identified individuals who I felt were well positioned to have the perspectives that were relevant to the topic and the research question and could provide information centrally important to the purpose of the study. In addition, purposive sampling allows researchers more influence on the sample composition because they can create samples tailored to their specific

study needs (Teddlie & Yu, 2007). In theory, in order to delineate a sample universe, a set of inclusion criteria must be specified for the study specifying attributes prospective participants must possess, in order to qualify for the study. The sample universe also needed to have a degree of homogeneity to ensure that the study remained contextualised within a defined setting and any generalisation from the study remains in the confines of that localised sample universe. For example, my samples would have geographical homogeneity because they were drawn from the same location (Robinson, 2014), the respective universities.

Because purposive sampling is traditionally associated with small samples, I needed only a few participants for interviews. In this case, my sampling frame was the teacher education departments of the selected universities, from which I initially selected a smaller sample of three teacher educators from each department. The three selected teacher educators were teaching current teacher candidates at the time of generating the data. The key consideration was to gather rich and detailed data, so I delineated a sample that was sufficiently small in order to give adequate 'voice' to individuals in the study and to enable intensive collection and analysis of data from each interview conducted (Smith, 2008). This also helped me not only to avoid getting bogged down in huge quantities of data, but it also allowed participants to remain distinct instead of becoming swamped into an anonymous part of a large whole (Smith, 2008; Robinson, 2014). Another major strength of the small sample which influenced my decision, was primarily that it had the potential to lead to a greater depth of information from a smaller number of carefully selected cases. My focus here was on the depth of information that could be generated by the participants, thus by selecting only participants who were actively involved in teacher education, I selected participants who would address specific research questions and from whom it was possible to learn the most.

5.3.3 Procedure of sampling for focus group

Respondents for the study were selected using the non-probability snowball sampling technique. This process presented more challenges than the individual interviews because there were more people involved, so finding the right people who were willing, finding a suitable time and venue for all of them, was always going to be a complicated process. My intention was to identify at least one student from each department as the first point of contact to assist me in recruiting their associates to make a representative group of each institution (de Vos et al., 2002). Yet to identify

this first person I needed again to revert to my key agent who willingly became the pivotal figure in the recruitment process. This was particularly important because the recruitment process required someone reasonably familiar with these student teachers and with some degree of access to their networks. The main disadvantage in this arrangement was that I knew close to nothing about the participants who agreed to participate in relation to those who might have participated, for the participants could just as well have been gotten through convenient sampling.

Nevertheless, participants were selected because they were homogeneous in some respects like an aggregation of individuals sharing some general social features or experiences as teacher candidates (Hyden & Burlow, 2003). The focus groups were composed entirely of teacher candidates and in all the three groups, participants were homogenous in terms of being at the same stage on the same programme. All the group participants in the three institutions were teacher candidates in their final pre-service year and they were selected on the presumption that all of them would be able to make an exploration relevant to the research (Smith, 2008) and could share something about the subject. For example, at the Canadian university, all the students were in the final year of a two-year post-graduate teacher education programme.

Considerations of diversity were made but it was not possible to get an equal number of males and females per group, mostly because of the general pattern that there are more women in the teaching field than men. There were five participants (two males and three females) in the focus group at the Canadian university, eight at the South African university (one male and seven females) and seven at the Zimbabwean university (two males and five females). All participants signed written informed consent forms before the beginning of the discussion. Participants were invited to speak freely and asked to respect the views of the other participants. Each of the discussions lasted for approximately 90 minutes and there was generally very active participation in all the group discussions. Below is a summary of all the participant data.

Table 5.1: Participant data

DATA COLLECTION SITE	PARTICIPANTS	DATA TYPE
CANADIAN UNIVERSITY	4 Teacher educators 5 Teacher candidates	Individual interviews Focus group interviews
SA UNIVERSITY	3 Teacher educators 8 Teacher candidates	Individual interviews Focus group interviews
ZIMBABWEAN UNIVERSITY	4 Teacher educators 7 Teacher candidates	Individual interviews Focus group interviews
TOTAL 3	33	2

5.4 Sources of Data

Interviews and document analysis formed the backbone data of this qualitative study. Two kinds of data were generated – data was collected at two levels: naturally occurring data in the form of curriculum documents and associated literature, and data generated through individual and focus group interviews. The field notes that I gathered in the actual research process became a significant source of data for this study.

Table 5.2: Sources of data

Source of Data	Purpose of Data
Documents: ● Curriculum documents ● Department websites ● Course goals and mission statements ● Reports and minutes ● National and institutional policy documents	● To identify ideas, values, attitudes and beliefs, perceptions, experiences to access their beliefs and priorities about inclusion, how they address public policy. ● To understand structural and cultural contexts.
● Focus group interviews with teacher candidates. ● Individual interviews with teacher educators.	● Perceptions, ideas, experiences. ● Conceptualisations, attitudes, values, ideologies.

5.4.1 Interview method

I used individual interviews and focus group interviews as the primary methods of collecting data in this study. Interviewing is an attempt to understand the world from the participants' points of view, to unfold the meaning of people's experience and uncover their lived world prior to scientific explanations (Mouton, 2010). I chose the interview method for this qualitative study because the strength of the interview method is that it allows the gathering of in-depth material on individual experiences and perceptions and how individual points of view relate to specific topics. As Wilson (2012) points out, the interview method is a useful way of engaging experience. Interviews may not reveal real causes of action and sometimes present a partial picture, but if we do not investigate actions as experienced by actors, it is impossible to get insights into the actual and empirical representations of action. Interviews provide a means of access into individual experiences and the goal of any qualitative research interview is to see the research topic from the perspective of the interviewees and to understand why they have that particular perspective (Wilson, 2012). Thus,

"at the root of interviewing is an interest in understanding the experiences of other people and the meaning they make of that experience" (Seidman, 2006, p. 3). One additional advantage of interviews is that in the actual process, it is always possible to make it more productive by pursuing specific issues of concern that can lead to focused and constructive suggestions and detailed information from just a few participants (Schneiderman & Plaisant, 2005).

5.4.2 Interview questions

As I worked on the interview questions, I was always aware that the interview protocol serves as the foundation on which an interview is grounded, so I made several important considerations before creating the final interview protocol (de Vos et al., 2011). Although most researchers refer to three types of interview questions (structured, unstructured or semi-structured) ordinarily used in educational research, this study used semi-structured questions. I did not use structured interview questions because this protocol usually uses closed questions which are often short and clearly worded in order to elicit precise answers from participants and participants are normally all expected to answer the same questions. The rigidity of a highly structured protocol often inhibits uncovering the individual participant's rich and unique experiences. This would not work well for my purpose which was to get the teacher candidates to share rich details about their experiences. In an interview that uses unstructured questions, the researcher usually uses questions which are very open, with the result that the questions often become difficult to standardise across participants because of 'over' flexibility (Preece, Rogers, & Sharp, 2002). For those considerations I used semi-structured interview questions. Unlike in unstructured interviews where respondents usually do not have to answer the same questions (Robinson, 2014), I used the same questions for all participants but built in flexibility in the way the questions could be answered. In order to encourage participants to speak more freely, I allowed the interview to seem like more of a friendly conversation than a data gathering interview (Seidman, 2006). I ensured that while there was a relatively high degree of formality in the semi-structured interview, the interview discussions remained open and flexible to enable me to probe respondents' stories in greater detail. In addition, although I was able to, where necessary, pursue in greater depth any areas of interest that emerged for each interview, I would ensure the interview remained focused on the main issues (Robinson, 2014). The open approach also allowed for more opportunities for clarification, probing and cross-

checking of questions when necessary, and the freedom to rephrase or alter questions depending on the participant's responses.

5.5 Research Process

The practical activities during the actual study included preparation before the study. This included travel to distant places in some instances, obtaining permission from gatekeepers at all three institutions, identifying potential participants and setting up timely appointments with the individuals. In each instance I started by identifying a key agent who would then assist me to find my way around and to negotiate with would-be participants. Since my first target participants were all staff members in the teacher education departments, most, if not all of them, were very familiar with my purpose and were often very co-operative and even helpful in some cases. Equally, through the assistance of the key agents, teacher candidates were easy to assemble except in one institution where it was extremely difficult to put a group together. In this institution, eventually one of the teacher educators assisted me to recruit from his class directly. In addition to the central location for teacher educators, all participants were in different roles for each university setting and there was less concern about ethical issues like informed consent except of course for the emphasis on confidentiality and anonymity. Because some participants expressed concern about anonymity, I made a commitment to them that confidentiality and anonymity would be strictly maintained and I have made every effort to maintain the participants' personal and institutional anonymity. For the purposes of this study, I will consistently refer to the institutions as a Canadian university, a South African university and a Zimbabwean university.

5.5.1 Interviews

The first institution at which I conducted interviews was the Canadian university. I interviewed (individually) four teacher educators and five teacher candidates (focus group) as shown in Table 5.1 (see 5.2.4 above). The interviewees included the departmental chairperson and three other lecturers in the department, all of whom were actively involved in teacher education. My intention initially was to interview only three teacher educators but then I felt that the department chair, who was a key agent in this context, could provide a much wider perspective in terms of the institutional policy and goals related to the future of inclusive education. Altogether, three of the interviewees

were female and only one was male, but there was greater diversity in terms of their specialisations which included Mathematics, Science, Research Methods and English. I thought this would probably provide not only different ways of understanding inclusion, but also a different range of barriers that were encountered in the different disciplines, wherever that was relevant. The selection was therefore both purposive and convenient because all the interviewees were directly involved in teaching teacher candidates and they were readily available in one locality.

Each teacher educator arranged to have the interview conducted in their office which was an additional advantage to them in terms of staying in their comfort zones. With the help of the key agent, I arranged to conduct one interview a day consecutively, for the first three interviewees and the fourth interview was conducted over the phone because the participant could not avail himself physically, which was very convenient for me in terms of time and preparation. I did four interviews in total at this institution. The second institution was the South African university. I was able to interview three teacher educators as planned. All the interviewees who agreed to take part in the study were females and all of them taught courses on the teacher education programme. The third and final institution was the Zimbabwean university. I interviewed four teacher educators, all of whom were males and were actively involved in teaching different courses on the teacher education programme. This lack of balance in terms of gender in the different institutions could be explained, partly, just in terms of availability of teacher educators at the time of my visit, but mainly because of the nature of the staff composition of the education department. Most of the teacher educator interviews lasted between 45 to 60 minutes.

5.5.2 Focus group interviews

I also used focus group interviews as a means of generating data for this study. A focus group interview is a research method that generates data through group interaction, with participants being encouraged to share perceptions, points of view, experiences and concerns in a non-threatening environment and without pressure to reach a consensus (Denzin & Lincoln, 2005). Its aim is to identify shared experiences and common knowledge. According to Wilkinson (1998, p. 187), the purpose of a focus group interview is "to elicit people's understandings, opinions and views, or to explore how these are advanced, elaborated and negotiated in a social context". Morgan (2012) defines the focus group interview as a research technique that collects data through

group interaction, on a topic determined by the researcher. It is often commonly used as a tool for exploring people's views, perceptions or attitudes towards particular experiences (Morgan, 2012). The focus group is particularly useful for exploring people's knowledge and experiences and can be used to examine not only what people think, but how and why they think that way.

There are many advantages associated with group interviews as opposed to individual interviews. The group process helps people identify and clarify their views (Morgan, 2012), since the group format can function as a promoter of synergy and spontaneity by encouraging participants to comment, explain, disagree and share views. Because of the interaction, focus groups can yield a rich blend of perspectives, as small groups can give each participant a chance to contribute. If group dynamics work well, focus groups can allow for new ideas to emerge because social interaction can stimulate discussion, ensuring cumulative and more elaborative data for a fuller and deeper understanding of the research topic (Denzin & Lincoln, 2005; de Vos et al., 2005). Focus groups can provide researchers with the possibility of generating large amounts of narrative data from the participants' perspectives in a short amount of time (de Vos et al., 2005). Furthermore, focus groups might encourage participation of those who are uncomfortable with individual interviews. The intention is to illuminate participant perspectives through debate within the group and to facilitate the expression of ideas and experiences that might not emerge as well in a single person interview (Mouton, 2010). There are many disadvantages to focus group interviews, however. Focus group interviews are sometimes viewed as unnatural settings and, as a result, it is always a huge challenge to establish an interactive, participative and non-threatening atmosphere in which all participants feel comfortable enough to share their views freely (Denzin & Lincoln, 2005). Furthermore, the possibilities of groupthink might threaten the dependability of data especially where some participants are differentially situated.

In all instances, I adhered to what seemed to be the norm to use a relatively small group (Kitzinger, 1994), in this case less than eight people in each group. Unlike in the one-on-one interviews where I took the central role due to my role as researcher, in the focus group discussion my role was rather peripheral as part of the strategy because in this instance, it was the inter-relational dynamics of the participants that were important (Morgan, 2012). I tried as much as I could to constantly encourage the participants to talk to one another, ask questions, exchange anecdotes and comment on each other's experiences and ideas (Kitzinger, 1994). This was not always easy as in some

cases, some participants remained quiet for most of the time, while the few individuals who were confident dominated most of the discussions. However, there was full participation from participants in two of the focus groups with most of the participants showing enthusiasm, in some cases pushing the discussion beyond the time limits I had suggested.

5.5.3 Document study

I also used documents as a data source in this study. Documents can be viewed as social facts which are produced, shared and used in socially organised ways (Bowen, 2009). There is considerable debate around the value of document study as a data source in qualitative research. Some researchers consider documents as "surrogates" for other kinds of data (Bowen, 2009) and only useful in a context of triangulation to provide the researcher with "a confluence of evidence that breeds credibility" (Eisner, 1991, p. 10). For example, documents can be used to provide convergence and corroboration of the interview data.

Some researchers, however, argue that while most social scientific research documents are placed at the "margins of consideration", they are a great source of data. As Prior (2003) puts it, "documents form a 'field' of research in their own right and should not be considered as mere props of human action, and they are produced in human settings and are always to be considered as collective (social) products" (p. 4). Indeed, documents are an important part of the data generation process not only because they carry the culture, history and context of a system but because they do not usually depend on the whim of an individual (Merriam, 2009).

In practice, I found that documents were actually a very important source of data. In almost all the universities in this study, the documents did not only provide background information (Bowen, 2009) to the issues surrounding inclusion, but they went further to define institutional policies and goals that provided meaningful context to the study. The inclusion policy documents provided by the Canadian university for example, gave a detailed historical overview of the development of social justice policies in relation to that country's Charter of Rights. In some cases, departmental policy documents gave elaborate mission statements about inclusion and social justice and provided detailed strategies about how the social justice goals would be achieved. As May says, documents can be used "to situate contemporary accounts within a historical context" (2001,

p. 175). Most of the documents were readily available, so it was also less time-consuming gathering information because most of them were easily available in the public domain.

Whereas some researchers suggest that a major disadvantage with documentary data is that it is usually biased in favour of those in control of the institution and does not provide insight into participants' personal thinking (O'Leary, 2014), this was not my experience as I got the impression that most of the documents were very comprehensive and spoke in the institutional voice. Of course, the problem with policies is that they tend to be aspirational rather than what is applied in practice. Most of the documentary data was really up to date and provided relevant information.

I collected a wide variety of documents from the three universities. The documents, as shown below, included course outlines, annual reports, public policy documents and locally bound teaching materials often referred to as course modules. Most of the documents made available to me directly related to inclusive education. In two of the three universities, the documents were easily available in the departments, especially course outlines. In one university, the documents were not easily accessible and were later forwarded to me by email by individual teacher educators. Other public documents like Ministry of Education documents were widely available on the official websites. In this study where the focus of the study was on formally organised institutions, documents of all types were extremely useful and helpful in providing background and context (Bowen, 2009).

Like all other qualitative data, the documents were examined and interpreted to elicit meaning, gain understanding and develop empirical knowledge (Corbin & Strauss, 2008). In Table 5.3 below, I list the documents I collected and analysed.

Table 5.3: Document types

AUTHOR, DATE & INSTITUTION	TITLE	REFERENCE NAME
Education Department (Canadian university) 2005	Policy of Equity and Diversity	Equity Policy
Ministry of Education Ontario (2013)	Equity and Inclusive Education in Ontario Schools-Guidelines for Policy Development and Implementation. Realising the Promise of Diversity (2009). (Policy/Program Memorandum 119). Revised on April 22, 2013.	PPM 119 (2013)
Ministry of Education Ontario 2015	York Catholic District School Board (YCDSB) - Equity and Inclusive Education (2015). Policy No. 613	YCDSB
Education Department (Canadian university) 2016	Equity Education - Course Outline	Course Outline
Education Department (SA university) 2017	PGCE Foundation Phase 2017	Course Module (FP)
Republic of South Africa Government Printing Works 2015	Government Gazette Vol. 596 No. 38487 Teacher Education Qualifications	Government Gazette
Education Department	Inclusive Education and Barriers to	Course outline

(SA university) 2016	Learning: Course Outline 2016	
Education Department (SA university) 2017	Differentiated learning articles 2017	Course Module (FP)
Education Department (SA university) 2017	Differentiated Learning to Support Learning Diversity (2017)	Supporting Learner Diversity
Zimbabwe: Ministry of Education and Culture (2008)	National Report on the Status of Education - 48th Session of UNESCO International Conference on Education (ICE) November 2008	UNESCO Report
Zimbabwe Ministry of Primary and Secondary Education (2015)	Zimbabwe Education Blueprint (2015-2022) Curriculum Framework for Primary and Secondary Education.	Curriculum Framework
Education Department (Zimbabwean university) 2016	Inclusive Education	Course Outline

5.5.4 Data summary

Because this study was underpinned by critical realism, the interview data was very important because critical realism incorporates the perspectives of participants on the assumption that the accounts of the research participants are valid social scientific data that can lead to social transformation (Egbo, 2005). This data from interviews and documents was not an end in itself; it is the transitive knowledge that provides access to that which exists in the social world independent of our knowing; the mechanisms and tendencies which are the object of research. As noted earlier, in critical realism, interview data is useful if the researcher bears in mind that what people say or

know, does not necessarily correspond to reality because it is their perception of reality and might not necessarily be accurate. In a realist study, this data should be understood to be "usefully seen, not simply as 'texts to be interpreted, or as constructions' of participants, but as evidence for real phenomena and processes that are not available for direct observation. Those data could be used to make inferences about the phenomena, which could then be tested against additional data" (Maxwell, 2012, p. 103).

5.6 Reflexivity

There was always a need in the analysis process to keep my own position as researcher transparent and to justify at every point why certain interpretations and readings of discursive events seemed more valid than others. This makes reflexivity an important part of research as pointed out before, whether the intention of reflexivity is to strengthen the rigour of social science research or questioning the epistemological or ontological foundations of knowledge claims that can be made (Alvesson & Sköldberg, 2009).

Throughout the research process, I paid attention to the fact that as an educator researching educational practice, I had to maintain a heightened sense of self-awareness to ensure I did not take some things for granted. As a result of my familiarity with educational settings, the potential existed that my assumptions of what might be the case in each setting, could have constituted a substantial threat to validity. This was one advantage of using critical realism as an underpinning of this research. As Simmonds and Gazley (2018) argue, "CR provides the basis to reflexively evaluate and critique assumptions and our current trajectories by providing us with an understanding of being and its structure, its processual and multiply determined nature" (pp. 140-159). There was also a real danger of making knowledge claims based on my familiarity with issues concerning social justice, since there was a very active inclusion discourse in Canadian education prior to and while I was in the process of conducting the research and writing this dissertation.

As part of reflexivity I made sure I explained all my choices and decisions at every step – from data gathering to the process of interpretation, justifying why certain methods were used rather than others (Bucholtz, 2001). Furthermore, I also kept in mind that I not only had to locate myself

as a text analyst once the data collection was done, but that I needed to also bear in mind that I was part of the language patterns I was studying (Chouliaraki & Fairclough, 1999).

Particularly important was the question of ideological bias in Critical Discourse Analysis (CDA). While CDA indeed provides a useful theoretical perspective to examine power relations and ideologies embedded in texts, the process of analysis should always guard against reading ideologies into the data instead of allowing networks of practices to appear and be read from the data (Rogers, 2005). Analytic decisions were outlined very carefully and clear analytic procedures were followed. Political positions arose from the data and were not read into. I made sure that, at every point, I consciously guarded against ideological assumptions that had a bearing on the way nuanced and implicit meanings were deconstructed. I deliberately avoided bringing in my own preconceived ideas about the politics of exclusion and inclusion.

5.7 Validity

Although qualitative research has become increasingly recognised and valued as a means of generating knowledge in the social sciences, there are always challenges related to validity and overall trustworthiness of the data and the need to verify that the findings arrived at qualitatively are not just the personal beliefs of the researcher (Worthen, 2001). The difficulty is compounded by the fact that while there is well established language describing measures of validity and reliability in quantitative approaches, many researchers feel that it is inappropriate to use the same descriptors for qualitative research because from the onset, the epistemological underpinnings, processes and procedures of the research paradigms are vastly different (Ponterotto, 2002). It has long been felt that concepts of reliability and validity are quantitative and positivist and are not applicable to qualitative research. This is essentially because they are based on standardised instruments (Merriam, 1998) and cannot work with small, non-random samples where the researcher is more interested in understanding the meaning and interpretation of phenomena. Unlike in quantitative research, the test in qualitative research is not whether the analysis is "consistent over time or between researchers" (Boulton et al., 1996, p. 176), but ensuring that "data generation and analysis have not only been appropriate to the research questions but also thorough, careful, honest and accurate" (Mason, 1996, p. 146). Temple (1998) also argues that reliability should not be viewed in a statistical sense but must be demonstrated by the researcher discursively

through argument and persuasion, revealing how generalisations have been arrived at in a way which gives others confidence in the research.

Although there are many types of validity, I considered the three types that are ordinarily more relevant to qualitative research, viz descriptive, interpretive and theoretical validity. In descriptive validity, the goal is to maintain factual accuracy (Maxwell, 1992). I tried as much as was possible to ensure that what the participants described was transcribed and presented accurately. As Cohen, Manion and Morrison (2004) suggest, the meanings and interpretations should attempt to present as much as possible the perspectives of the participants and the interpretive accounts were grounded in the verbatim language of the people that participated. Theoretical validity refers to the application of given theories or concepts to the data. I consistently relied on the critical realist approach of moving from what is experienced towards knowledge of what is there. Critical realism enables a shift from a focus on events and experiences that can be empirically observed, to the causal mechanisms influencing them (Scott, 2010). In terms of interpretive validity, I used the processes of abduction and retroduction to analyse and explore the underlying structures and mechanisms that influenced the discourses of inclusion in the different contexts.

Further, I leaned more towards Cohen et al., who argue that in spite of the challenges, "validity might (still) be achieved through the honesty, depth and richness and scope of the data achieved, the participants approached, the extent of triangulation and … the objectivity of the researcher" (p. 105). I adopted the view that, instead of transferring terminology across paradigms, it was better to adopt alternative terminology that has emerged outside the linguistic confines of a quantitative paradigm. In this view, findings are assessed in terms of trustworthiness instead (Huberman & Miles, 2002). Trustworthiness refers to the extent to which the data and its analysis are believable and trustworthy. In line with this, some researchers have suggested three major categories of trustworthiness in qualitative research which include integrity of data, balance between reflexivity and subjectivity and clear communication of findings (Williams & Morrow, 2009). Guba and Lincoln (1981), Krefting (1991) and Creswell (2012) also proffer alternative strategies for assessing what they call credibility, transferability, dependability and confirmability of the research. These are all varied ways to address issues of internal and external validity.

I also took other measures to ensure that the research findings had a high degree of validity and credibility. From the onset, I ensured that the process of data gathering itself was rigorous and the research design was planned and executed in such a way that it maximised the "validity of the findings" (Mouton, 1996, p. 175). There was clear articulation of methods and methodology, including the advantages and disadvantages of all options, such as the choice of a qualitative approach as opposed to quantitative methods. Considerable thought went into the exposition of all the selected methods of data collection. By using three methods of data gathering, individual interviews, focus group discussions and documents, I ensured that sufficiently varied kinds of data were gathered. I also ensured that suitable sample sizes were adequate and more or less similar across contexts, and both the interview protocols and the diversity of participants contributed significantly to the dependability of findings. I have no doubt that I used robust data collection techniques and my documentation of the research procedures also lends a high degree of trustworthiness to the research.

As indicated at the beginning, the need for awareness (reflexivity) of the researcher's contribution to the construction of meanings attached to social interactions and acknowledgement of the possibility of the investigator's influence on the research (Yin, 1994) can never be overstated. As Hallberg (2013) argues, because the researcher is the main "instrument" in qualitative research, he/she must account for all the personal, as well as professional experiences that may affect data collection, analysis and interpretation of data. As a researcher I was part of the social contexts of the research and was inextricably part of my own research and this can have a serious influence on how data is generated and interpreted. As part of a conscious strategy to increase the validity of the research findings, I tried at every point to identify my biases, motivations, interests and perspectives (Lincoln & Guba, 1985) to ensure that this did not colour my vision in ways that were already deeply ingrained in how I perceived the world. I had to do a lot of introspection and acknowledgement of my own biases.

I also attended to other technical aspects of the study. For example, I paid attention to the quality of transcripts that were produced from the recordings. A very high level of accuracy was confirmed by closely comparing the transcript and the original recording. This action, coupled with multiple data collection and analysis techniques (triangulation), significantly increased the validity of the research findings. Triangulation involves the use of multiple methods and measures in a study in

order to deal with concerns of bias and validity (Scandura & Williams, 2000) by comparing data to decide if they corroborate and validate each other. In this study for example, I used individual interviews, focus group interviews and document analysis.

Although I had initially intended to include respondent validation (member checking) to give participants an opportunity to verify whether the findings reflected their intended meanings, in practice I could not get to do this because of time constraints and other practical difficulties. Guba and Lincoln (1994) argue that member checking is probably the most crucial tactic for assessing trustworthiness, but I think sometimes it is overrated since the participants might still defer to the researcher and accept his version depending on the power difference between them, or the participants might only accept conclusions that they see as positive.

Every effort was made to improve the validity of the research findings by using strategic sampling, and rigorous procedures for analysing data. At every stage I attempted to justify how particular methods and data sources were used. In addition, I applied a variety of analytical tools in my analysis like discourse analysis and retroduction to ensure that the analysis of all data was at least grounded in some theory in order to enhance validity. I realise though, that there are substantial concerns about the use of theory because of its dependency on abstraction and the consequential removal from context and individual experience. As Guba and Lincoln (1994) argue, abstract theories are not well grounded in what the informants themselves experience and think.

Of course, there is always the perennial limitation that a qualitative approach cannot be avoided in spite of the richness and detail of the data. It is widely held that the findings in qualitative research are not generalisable to a larger population because very few participants take part in studies offering so much detail (Creswell, 2007). However, while generalisations cannot be done in the same way as results based on quantitative methods, it is possible to generalise findings across contexts or circumstances if they have similarities. Porter (2007) argues that generalisability is not simply a matter of applying the rules of experimental design, because the goals and the purpose of the research are often different. This view is supported by Eisner (1991) who also argues that the generalisability of qualitative research should not always be in truth per se, but in its ability to refine perception and deepen conversation on the object of study. In this study for example, the findings could be relevant in a variety of contexts in terms of informing practice and expanding

the inclusion discourse among education practitioners and policymakers. On the question of relevance to different contexts, the onus should be on the readers of the study to judge the claims and weigh their applicability in relation to their own practice or life situation, and if there are any new insights, to use them appropriately (Hallberg, 2013).

5.8 Ethics

In conducting this study, I followed all the Rhodes University guidelines on ethics and adhered to all other aspects of the ethical clearance process accordingly. The prescribed application was submitted to the Ethics Committee of Rhodes University and approval was granted. Permission and approval for the research in the other selected universities was duly sought and gained from the appropriate university authorities in the three countries.

All participants were treated with respect and dignity and every precaution was taken to ensure that no aspect of this study resulted in any harm or discomfort to the participants nor in any way impaired their dignity. I also maintained a very high level of transparency and honesty in my communications with gatekeepers, key informants and all research participants. The participants were duly informed of their right to withdraw their participation at any stage of the interviews or discussions, including before and during the interview and that they were not in any way obliged to answer any questions that they might be uncomfortable with. Upon our first meeting, participants had their rights explicitly explained before they signed the consent letter and the participants were advised in advance that no remuneration or compensation would be offered to them in consideration of participation.

The voluntary and informed consent of participants was sought. Fortunately, in this study, all the participants were independent adults which automatically excluded any minor population. The voluntary nature of participants' involvement was always clearly explained and emphasised in the initial participant information communication attached at the end as Appendix A. I also accepted full accountability and responsibility for ensuring anonymity of the participants and the responsible use of their materials. I ensured and will continue to ensure that the sources of the data will never be identifiable because no names or other unique identifiers were attached to the data. The identities of the participants will remain anonymous. Special care was taken to ensure that in

reporting the data from interviews I did not use any markers that would make it possible for readers to identify sources. All information collected was kept confidential and the responses of the participants were transcribed and used anonymously in the dissertation. Furthermore, all the information was used for research purposes only and neither the names of the participants and that of their institution nor any other information that could identify the participants was used in any publication or presentation of the study results. The data will be safely stored for five years then will eventually be duly disposed of in accordance with best practice.

5.9 Data Analysis

While the act of data analysis is often construed as the organising of textual data into manageable categories, patterns and relationships (Neuman, 1997), the process of analysis begins simultaneously with the data collection (Maxwell, 2013). As I conducted interviews and read different documents, I could already see some patterns forming which later morphed into themes and categories. Even as I made field notes, it was inevitable that I engaged in some form of interpretation at every stage.

Nevertheless, according to Merriam (2009), data analysis is the process of making sense of data. Marvasti (2004) describes it as "the interpretive activity of making sense of human artefacts by conceptually connecting them with other meaningful data" (p. 82). No doubt the data produced in the collection process is invariably unstructured and unwieldy, consisting of verbatim transcriptions of interviews and discussions, field notes and written documents, so my first task was to provide some sort of coherence and structure to the data, which involved consolidating, reducing and interpreting what participants had said and what I had read from the documents (Quinn, 2006). Because data on its own does not 'speak for itself", a process of abstraction had to take place where I used reason to make inferences from the selected data. As Danermark et al. 2002) put it, "Reasoning, our ability to analyse, relate, interpret and draw conclusions, is a fundamental precondition for all knowledge and knowledge development" (p. 79). This process was elaborate. It involved using the available concepts to engage in abstraction, allowing me to examine the deep generative mechanisms that produced the events at the level of the actual and which may or may not be experienced at the empirical level (Quinn, 2006).

Because this study used critical realism as its philosophical and methodological framework, I also adopted tools of analysis that are consistent with critical realist ontology and epistemology. In the critical realist's stratified view of reality, the analytical process has to move beyond the inductive and deductive to the causal-explanatory mode of theorisation to be able to postulate the social structural processes underlying the emergence of social agents' discourses of practice (Crinson, 2007). The focus of the analysis was not to uncover general laws but to engage critically with the assembled data in order to understand and explain the underlying mechanisms; to uncover and describe the mechanisms that produced the events. As Bhaskar puts it, to "move from the manifest phenomena of social life as conceptualised in the experience of social agents concerned, to the essential relations that necessitate them" (1979, p. 32). The data from the interview and documents was the transitive knowledge that provided access to that which existed in the social world independent of our knowing; it was the empirical which was the experience of the participants and it was distinguishable from the 'actual' and the real (Bhaskar, 1975). The critical realist task was to move beyond these narratives and accounts of experiences provided by the interviews and documents to reach an interrogation of the mechanisms from which the experiences emerged. In this process, "explanation involves a movement from the observed phenomena at one level to their underlying causes at another, and deeper level, and is possible without any stable event regularities being observed" (Bergene, 2007, p. 13).

The explanatory process is no doubt complex, often requiring continuous disaggregation and reconceptualising. As Lawson puts it, events are typically unsynchronised with the mechanisms that govern them but are "conjointly determined by various perhaps countervailing influences so that the governing causes, though necessarily "appearing" through, or in, events can rarely be read straight off" (2008, p. 22). My goal as researcher, therefore, was to be able to separate the three levels of reality in the process of analysing the collected data and for that reason, this process required robust methodological tools. The conceptual abstractions and different modes of inferences helped me to understand what produces social phenomena which is often an outcome of complex combinations of influences from different mechanisms, some that reinforced each other while others counteracted each other (Danermark et al., 2002). This is where modes of inference like abduction and retroduction are useful in making possible a more rigorous form of analysis capable of distinguishing the "actual" from the "real" (Meyer & Lunnay, 2012).

It is important to reiterate at this point that in critical realist ontology, all explanations of reality should be treated as fallible (Bhaskar, 1979), including the explanations provided by research participants, theorists and scientists. Both scientific explanations and experiential explanations could be potentially fallible, yet at the same time it should be acknowledged that in critical realist research, the participants' experiences and understandings can challenge existing scientific knowledge and theory (Egbo, 2005). Working from a critical realist perspective, I was always conscious that reality is not always as it appears on the surface. I approached the process of analysis with the aim of achieving a deeper understanding of reality considering both the history and context of higher education. I also attempted to eliminate the error of conflation, bearing in mind that our knowledge of inclusion does not represent what can be known about the phenomenon. In that way, it became possible to move the focus from the empirically observed and experienced narratives to the mechanisms that produced those experiences.

5.9.1 Coding and category construction

Intensive data analysis is usually preceded by data organisation and management. The preliminary stage is basic data coding which involves simply allocating codes to the interviews. This of course is then followed by more formal data-coding which involves the construction of categories (Merriam, 2009), initially into broad themes related to answering the principal research question. My research question was: How is inclusion as an aspect of social justice conceptualised and practiced in teacher education programmes in the three selected institutions in the three countries?

This is an important stage. At this stage, "the goal is to learn from the data, to keep revisiting it till you understand the patterns and explanations … coding is not merely to label all the parts of documents about the topic, but rather to bring them together so they can be reviewed and presenting your thinking about the topic developed" (Richards, 2005, p. 86).

I used organisational coding (Maxwell, 2012) which mainly involved creating topic-based codes based on my research question. This is an inductive process that enables development of a wide range of categories and the identification of aspects which relate to the research question. The process involves going back and forth, reading and re-reading the interview data and trying to identify demi-regularities (Fletcher, 2016). My first broad categories were in response to the first

part of the question which related to individual conceptualisations of inclusion, so I created a category for definitions of inclusion, as given by all the different participants. Then I created another category for teacher educator practices of inclusion. I did the same for the teacher candidates, opening one category for their definitions of inclusion and another for their experiences of inclusion. This was primarily descriptive coding, which simply established the first level of identifying dominant categories in a broad sense.

At the second level, I moved to axial coding (Corbin & Strauss, 2007) or analytical coding (Merriam, 2009). At this point, the categories became more analytical and were prompted by the individual sub-questions beyond the generalised descriptions. The questions were strongly aligned to the research questions and narrowed the responses to specific issues raised by the different participants and because of that, new categories emerged. In terms of perceptions, new categories like qualities of inclusive teachers and relevance of inclusion to teacher education emerged. In terms of practice, the concerns to do with existing conditions, and contexts associated with teaching practices that enhance inclusion came into view, and categories for issues of organisation of teaching and pedagogic practices, challenges and barriers to inclusive practice and cultures of individual contexts also emerged. The same applied to the data from the students and the documents I analysed. In the critical realist approach, this working and reworking of data began the movement of understanding and interpretation beyond the appearance and the literal to deeper levels, in order to engage the underlying mechanisms that may be causing the manifestations that a researcher sees (Danermark et al., 2002).

5.9.2 Fairclough's CDA as an analytical tool

In this study, Critical Discourse Analysis (CDA) was adopted as a well-established interdisciplinary methodology (McKenna, 2004) for analysing discourse and discursive practices ,such as the way inclusion was conceptualised and represented in the higher education contexts of three institutions in three countries: Canada, South Africa and Zimbabwe. Because I was looking at broad contexts, I chose what Fairclough (2005) calls orders of discourse. CDA was the main analytical tool for working with data in this study to develop an explanatory critique of inclusion in higher education practices. I made this choice because CDA can be used to interpret data in

great depth and can reveal the hidden motivations behind a text, thereby helping to bring out tensions and contradictions (Griffin, 2007).

Discourse analysis is basically the analysis of language in context (Gee, 2012). Discourse analysis assumes that language is not a neutral tool for transmitting messages. Thus, all communicative events including interviews, written reports and focus group discussions constitute a way of understanding the world or any phenomenon for that matter (Griffin, 2007).

CDA is both a theory and a method "that examines how social and power relations, identities and knowledge are constructed through written, visual and spoken texts and the contexts of their production and consumption" (Lewis, 2006, p. 374). The main tenets of CDA are that language is a social construction which is dialectical in the sense that it influences the contexts in which it occurs and the contexts influence language production, and finally that meaning-making is both a cultural and a historical act. As Howarth (2010) explains, language use is affected by its groundedness within certain frames of cultural and social practice, but also the use of language influences and shapes the social and cultural contexts in which it occurs.

CDA is a form of research that focuses on the relationship between language and society, and addresses how context and meaning are influenced by text and the wider socioeconomic context in which they are embedded (Wodak & Meyer, 2001) and although there are many ways in which CDA is approached by scholars, they all focus on the dialectic relationship between language and society. As Gouveia (2003) suggests, the notion of discourse in CDA should be understood as a "probability pattern of a continual exchange of meaning in an inseparable web of relationships that include language, people, events, situations, institutions, social structures and so on" (p. 386). Thus, CDA does not only focus on the technical aspects of language that often result in analytic tools being devoted to examining only discrete pieces of language. CDA includes placing these pieces in a wider meaning so that it is not enough to merely study discourse as linguists have traditionally done, but to augment it with social analysis. The aim of this critical approach is to build a political critique into its theoretical and methodical tools of analysis (van Dijk, 1998). As Fairclough, Jesop and Sayer note, "because texts are both socially structuring and socially-structured, we must examine not only how texts generate meaning and thereby help to generate social structure but also how the production of meaning is itself constrained by emergent, non-

semiotic features of social structure" (2002, p. 26). Thus, according to Fairclough et al. (2002), CDA is not merely an analysis of discourse but an explanation of the relationship between discourse and other non-discoursal elements of the social in order to reach a better understanding of these complex relations. CDA therefore helps us to gain a proper understanding of how language functions in constituting and transmitting knowledge, in organising institutions or in exercising power (Wodak & Meyer, 2001). Because language indexes, expresses and challenges social relations, CDA sets out to describe, interpret and explain the relationship between language, social practices and the social world (Rogers, 2005). A text on its own does not "speak" until it is interpreted, and that process of interpretation takes place under particular social conditions and is carried out by an individual or persons who have their own history and interests (Mitchell, 2008).

Since the interest in CDA is seeing how discourses influence and represent reality, while at the same time, seeing how discourses are constrained by reality, CDA inclined itself well to this critical realist study. CDA is consistent with critical realist philosophy because of its explicit focus on context and text. Critical realist attempts to analyse the social world should include semiotic analysis, of which discourse analysis is a part (Fairclough et al., 2002). CDA does not simply describe and evaluate existing realities but seeks to explain them by showing them to be the effects of structures and mechanisms or forces in a particular social reality (Fairclough, 2013). Thus, in a critical realist framework CDA aims to explain social processes and events in terms of causal powers. Using critical realism will show that social reality may be very different from its empirically observable surface appearance.

This study sought to use CDA to examine how sociopolitical contexts shape the nature of textual interpretation and responses to inclusion and inclusive practice. Because CDA looks at how texts construct representations of the world, social identities and social relationships, data analysis involved identifying discourses in the data and how they related to other dominant discourses which had been identified in the literature or by other theorists in the field. Still, the focus remained on how dominant discourses contributed to changes in the understanding and practice of inclusion in teacher education with the idea of deepening our understanding of the influences that enable or constrain enactment of inclusive practice in teacher education (Quinn, 2012). The purpose of the document study and analysis was to show the ways in which inclusion as an aspect of social justice was constructed and presented through public documents and how inclusion discourses echoed the

larger social and political educational reform. On the other hand, the interactive data from focus groups also gave insight into the ways in which micro and macro contexts of inclusion were linked together and the different ways in which competing discourses came into play. Education policy texts do not exist in a social vacuum, but have a complex historically changing and mutually constitutive relationships with their social context (Mulderrig, 2012). Instead of just presenting themes and narratives of inclusion or inclusive pedagogy, the analysis focused on discursive construction of the written texts and moved beyond description to interpretation and explanation.

Although the purpose of CDA is ordinarily to analyse "opaque as well as transparent structural relationships of dominance, discrimination, power and control as manifested in language" (Wodak, 2005, p. 204), it also has a constructive role rather than a deconstructive role (Luke, 2004). It can help us to understand how language is used to produce new frames of reference and shifts in thinking and interpretations of reality. As Luke (2004) argues, CDA should move beyond ideology critique to "speak to what is possible, the affirmative and critical potential of discourse as social, cultural and, indeed, political practice" (p. 202). In this way, CDA critique can make us mindful of how texts work to reproduce inequity and injustice, but it can also do a lot to move towards transforming these conditions (Lewis, 2006). For example, in this study, instead of only focusing on uncovering the discursive places where oppression and domination occurred and places where power was produced, I also focused on identifying affirmative, emancipating and redressive texts and discourse practices that constructed a richer picture of how and why participants conceptualised inclusion in their different ways.

CDA allows for the questioning of dominant discourses shaping the construction and representation of inclusion and social justice within educational practices, specifically in teacher education in the different institutions. In this instance, CDA allowed for analysis of not only what was said by the respondents but also what was left out. As Kress and Van Leeuwen (2001) say, a critical analysis considers absences as well as presences in the data. CDA examined closely what the participants said and did about inclusion and social justice, as well as what had been written and not written in order to bring to the surface the discourses influencing conceptions and practice of inclusion. Other than simply identifying the discourses, this inquiry also allowed for an in-depth analysis of the social and political contexts that produced these discourses. In this study framed in critical realism, discourse was understood to be mechanisms at the level of the real, in that they

were intransitive which meant they existed even if the people who used them or were affected by them were aware of them or not, and they possessed causal powers (they gave rise to events in the actual). While discourses alone do not constitute all the possible mechanisms in each context, they do have the potential to provide important insights (Chidhindi, 2016).

In view of that, the process of formal analysis began by establishing the initial broad categories through coding, then moving on to axial coding (Corbin & Strauss, 2007) or analytical coding (Merriam, 2009). As already explained (5.6.1), at this stage the categories that emerged became more analytical and were prompted by the individual sub-questions beyond the generalised descriptions. I ensured that the questions to be answered by the participants were more strongly aligned to the research questions. Then I applied CDA to the responses. As already demonstrated in Chapter Five, data for this study was generated through document analysis and in-depth interviews and were then all transcribed into text. Having textual data increased the likelihood that interpretation of the data would inevitably involve discourse analysis of one kind or another (Quinn, 2006). I have also emphasised (5.6.2) that CDA assumes that language is not a neutral tool for transmitting messages, so all the documents under study and the interviews constituted a particular way of understanding and practicing inclusion in the different institutional contexts. The data generated constituted textual representations of a semiotic kind (Griffin, 2007).

The focus, however, was less concerned with linguistic micro features of the discourses than with the capacity of texts to act as discursive mechanisms that influence the conceptualisation and the practices related to inclusion of participants. My primary interest was in looking at how discourses influenced reality. For example, the first question asked the participants to give a definition of inclusion. Most teacher educators spoke about equity of access or participation or equal opportunities as their understanding of inclusion. I would put such similar responses into one group which then became a theme or category. This became a discourse fragment to be examined, as in discourse analysis the data studied is always a fragment of the discourse (Keenan & Schieffelin, 1976). The discourse fragment constituted an underlying mechanism in the empirical data (Janks, 1997), so it became the first unit of analysis. The next fragment would begin when the focus of the definitions shifted from equity to something else, like diversity or recognition, or if a new fragment came up in response to the next question. At each point, I kept an awareness that boundaries between discourses were not fixed in any specific way as discourses can slip and slide into and out

of one another (Flatt, 2013), but I always ensured that the mechanisms constituted coherent fragments to make satisfactory units of analysis. I also noted that discourses do not exist in isolation. They are complementary and interconnected and often intertwined so it was inevitable that there was a lot of overlap between discourses (Flatt, 2013), for example in this case, an analysis of 'diversity' as a fragment inevitably overlapped with discourses of equity and recognition.

My aim in this study was to find out what structures and mechanisms affected the conceptualisation of and practice related to inclusion in the selected contexts. My focus was on uncovering from the data the discourses about the conceptualisation and practice of inclusion as an aspect of social justice as these emerged from participants and as inscribed in official texts. The interview responses were closely analysed to explore individual understandings of inclusion, as well as institutional understandings. Different discourses that reflected different conceptualisations of inclusion were identified. As Fairclough (2005) points out, discourses are not just words that people opt to use; they represent the beliefs and values of the participants. In the context of this study, which was underpinned by critical realist philosophy, these discourses constituted mechanisms which had causal efficacy and effects in the other domains of reality, i.e. events and participants' experiences of these events.

5.9.3 Abduction

I also used abduction as an analytical strategy to enhance my data analysis. This mode of inference is an innovative tool of analysis used in research to enhance qualitative analysis by exploring underlying levels of reality and uncovering their mechanisms and events (Fletcher, 2016).

Abduction, as an inferential process involves interpreting and recontextualising a phenomenon in the frame of a new set of ideas using creativity and imagination to give new meaning to the already known phenomenon (Bergene, 2007). It is a form of creative reasoning used to make connections between less obvious relationships between phenomena and then formulating new meanings about those connections. It is conceived as "a dialectical movement between empirical data and theory, as, in seeking to explain an empirical event, this event is related to theory that in turn leads the researcher to new interpretation of the event" (Bergene, 2007, p. 13). This process of abstraction often arises when an analysis of collected data brings up something unusual which raises the need

to generate possible explanations for such observations. In this way, abduction becomes a way of gaining a new insight or new perspective on a familiar phenomenon by viewing it through a different frame of interpretation (Danermark et al., 2002). As Danermark et al. (2002, p. 91) put it:

> The revolution of re-contextualisation is that they give new meaning to already known phenomenon. ... What is discovered is connections and relations, not directly observable, by which one can understand and explain already known occurrences in a novel way.

After coding the data, the analysis of coded data yielded some trends which needed explanation (Fletcher, 2016). This is where the process of abduction began. Abductive analysis specifically aims at generating novel theoretical insights that reframe empirical findings in contrast to existing theories. The assumption is that the construction of theoretical ideas based on empirical data can draw on existing ways of understanding what the phenomenon is about, so abduction assumes extensive familiarity with existing theories at the outset and throughout every research step. Abduction starts from a general theory or interpretation and thus, recontextualises the theory by applying it to a new context, or interprets a phenomenon in the light of a new theoretical framework.

In this instance, in order to understand more fully the different ways in which teacher educators conceptualised inclusion, I identified relevant theories as outlined below and compared and integrated them where possible, in order to understand the events in greater depth (Bergene, 2007). In order to understand more fully the different conceptualisations of inclusion in the different countries, I used different theoretical frameworks to analyse all the data I collected. In all, I used Fairclough's (1995) critical discourse analysis theory, Fraser's social justice theory and Tronto's normative theory of political ethic of care to make sense of the data. These theories provided a new frame of reference at each point that enabled me to explore the connections between the different texts, events and discursive practices on the one hand, and the social structures and processes that affected the conceptualisation and practice of inclusion (Fairclough, 2005) on the other.

It is important to note that critical realism acknowledges the value of existing theory in the analysis processes. Unlike grounded theory, which tries to avoid engagement with existing theory during analysis, critical realism "aims to find the best explanation of reality through engagement with existing (fallible) theories about reality" (Fletcher, 2016, p. 6). Grounded theory is committed to letting theory emerge inductively rather than imposing analytic frameworks *a priori* (Timmermans & Tavory, 2012, p. 167) while abductive analysis emphasises that "rather than setting aside all preconceived theoretical ideas during the research project, researchers should enter the field with the deepest and broadest theoretical base possible and develop their theoretical repertoires throughout the research process" (Timmermans & Tavory, 2012, p. 180). Supporting use of existing theory, Bhaskar (1979) argues that existing theory is a good starting point for the process of analysing data but it is always important to bear in mind that existing theories do not necessarily reflect reality accurately and therefore researchers should "avoid any commitment to the content of specific theories and recognise the conditional nature of all its results" (p. 6). For that reason, theories should be treated just as theories that facilitate a deeper analysis to help build a more accurate explanation of reality in a particular context. As Bhaskar succinctly puts it, "there is a real world and it is theory-laden but not theory determined" (1979, p. 6).

As I made use of the different theories outlined above, I was always wary of the fact that dependency on existing theory risks pursuing preconceived ideas. In order to strengthen the validity of my findings, I was therefore constantly alert to the fact that any methodology which allows for processes of reconceptualisation and creative reasoning (Maxwell, 2012) cannot entirely avoid interpretations at risk of being tainted by prior assumptions.

5.9.4 Retroduction

Retroductive analysis is an inference using transfactual arguments to evolve a different explanatory understanding of underlying mechanisms. It is "a distinctive mode of inference, which posits that events are explained through identifying and hypothesising causal powers and mechanisms which are capable of producing them" (Hu, 2018, pp. 118-139). The outcome of this meta-process is the identification of mechanisms that explain what caused particular events to occur, by identifying the circumstances without which a phenomenon cannot exist (Danermark, 2002; Bhaskar, 2009). Retroduction provides knowledge of structures and mechanisms that cannot

be directly observed in the empirical domain (Quinn, 2006). We can use retroduction to examine the fundamental structures and properties that are inherent in participants' experiences in order to get explanatory descriptions (Easton, 2010). The result is that we can identify the mechanisms that caused particular events to happen (Easton, 2010).

Retroductive analysis helps to ensure that those mechanisms that are not directly observable are not relegated as less real even when we are less able to conceptualise them. In that sense, it is inference that enables us to capture through reasoning the existence of something we cannot directly observe from the data by seeing its effects. Retroduction requires researchers to move from empirical experiences and descriptions of an unexplained event (domain of the empirical) to a deeper level of causal powers and mechanisms (domain of the real) which makes the phenomenon possible (Zachariadis et al., 2013). In critical realism, hypotheses are developed to identify and posit possible structures and causal mechanisms for social events, and they do not include predicted or generalised events. The goal is to posit structures and causal mechanisms that, if they existed and acted in the postulated manner, could function as a causal explanation for the events (Porpora, 2015).

Retroduction is used when we are relatively ignorant about the mechanisms in operation that are causing a phenomenon under investigation by making hypothetical conjectures requiring scientific imagination (Hu, 2018). The goal is to identify the necessary contextual conditions for a particular causal mechanism to take effect and to result in the trends observed in the empirical data. Thus, the aim of retroduction is to identify what is basically characteristic and constitutive of a phenomenon by asking the question "What properties must exist for x to exist and be what x is?".

To gain more insights into the underlying mechanisms that influenced the conceptualisation of inclusion and inclusive practices, I examined the different understandings of inclusion in relation to the three institutional contexts using retroductive analysis. The outcome of this retroductive analysis was therefore, the identification of mechanisms that explained what caused particular events to occur by identifying the circumstances without which the phenomenon could not exist (Danermark et al., 2002). The goal was to identify the necessary contextual conditions for a particular causal mechanism to have taken effect and to have resulted in the trends observed in the empirical data or beyond it. For example, in order to comprehend the causal mechanisms peculiar

to a South African university, it was crucial to understand that this institution operated in a country where educational discourse, just like many other discourses in that country, was dominated by discussions about the need to break with the apartheid past and redress the fundamental historical inequities (Council on Higher Education, 2016).

Thus, in retroduction, argumentation transcended the empirical observations provided by the participants in order to explain the conditions that would need to be present for particular aspects of inclusion to exist. In this study, therefore, I had to constantly move from the empirical, in the form of the different texts of data before me, to conceptualisations of transfactual conditions, in order to be able to describe the other conditions that would enable a particular aspect of inclusion to exist. I had to ensure at every point that this exercise would relate as much as possible, only to those conditions which would be essential and contingent to the existence of those aspects of inclusion under focus. In this instance, the questions I asked included:

- What must the world be like for inclusion to be understood predominantly in terms of equity and recognition?

- What must the world be like for these perspectives of inclusion to dominate the educational discourse?

In practice, the researcher takes an empirical observation and hypothesises a mechanism that might explain that particular outcome (Danermark et al., 2002; Sayer, 2004). The goal is to identify a circumstance without which something cannot exist, a means of knowing the conditions fundamental to the existence of a phenomenon. The process involves movement from "the manifest phenomena of social life, as conceptualised in the experience of the social agents concerned, to the essential relations that necessitate them" (Bhaskar, 1979, p. 32).

While this process of abstraction will certainly not exhaust all these structures that exist outside immediate observation, it provides a valid perspective and brings in other ideas that might not have been inferred from the empirical observation (Mitchell, 2007).

5.10 Conclusion

In this chapter I discussed the whole range of processes I used in this study from data generation, transcription, representation and discussion (Maxwell, 2012). As I indicated at the beginning of the chapter, I tried to ensure that there was a fit between the methods (techniques) and the methodological assumptions that I made about reality. Critical realism was the philosophical framework that underpinned this naturalist (qualitative) study. I used three methodological strategies for data collection: individual interviews, focus group interviews and document study. These three data collection methods were chosen in a most deliberative manner to collect information and understanding most effectively about inclusion in teacher education. A purposive sample was selected to meet the requirements of this particular study (Creswell, 2012). As outlined earlier, the data collection was done meticulously and all the interviews were recorded and carefully transcribed to ensure that the views and voices of the participants were most accurately represented. Attention was also given to concerns about reflexivity and ethics, and all other issues that concerned different potential threats to validity.

The coding process was also carefully done to ensure that the most relevant themes emerged and different tools of analysis like critical discourse analysis, abduction and retroduction were thoroughly examined and the research questions remained the analytical backdrop against which all data would be interpreted. However, as I made every effort to use all available tools and strategies for strengthening validity and to make the claims that were arrived at in this study relatively justified, I was always aware as a critical realist that the representations that emerged from this study, and any study for that matter, were fallible, historical, contingent and changing (Easton, 2010). My hope is that all these measures that I put in place in my research design helped to produce a plausible understanding of inclusion.

My research was about examining the meanings that teacher educators ascribed to inclusion and how inclusion was practiced in educational contexts as a social world. Because it was important to understand and explain these social phenomena, I had to critically evaluate the discourses and practices and the material structures that helped to shape and sustain those practices (Sayer, 1992, p. 39). These meanings existed mainly in the form of individual definitions of inclusion and personal narratives about pedagogy and curriculum by teacher educators and teacher candidates.

The documents provided pre-existing descriptions of events and accounted more fully for teacher education contexts and processes, as well as mechanisms and structures such as institutional policies and values. Critical realism offered new ways of understanding the conditions, and underlying causal mechanisms that influence perceptions and practices of inclusion in teacher education. In this qualitative study, the investigation consisted, as Bhaskar (1979:32) says, "in movement from the manifest phenomena of social life, as conceptualised in the experience of the social agents concerned, to the essential relations that necessitate them".

In the next three chapters I report on the key findings of the study. Chapter Six reports on the key findings of the study from the Canadian university. Following this, Chapter Seven focuses on the findings from the South African university, while in Chapter Eight I report on the findings from the Zimbabwean university. This sequence is followed throughout the remaining discussions of this study. I have decided to divide this discussion into different chapters for purposes of clarity and to enable me to capture in some detail the specific discourses that emerged from each institution in each of the three different contexts. In each discussion, I begin by summarising briefly the findings that came out of the study of the documents obtained from each university. I then proceed to discuss the different discourses that emerged from analysing both the documents and the interviews with the research participants in each setting.

CHAPTER SIX: KEY FINDINGS: CANADIAN UNIVERSITY

6.1 Introduction

The main research question was:

How is inclusion as an aspect of social justice conceptualised and practised in teacher education programmes in three selected institutions in three countries?

There were also three sub-questions:

1. How do teacher educators define inclusion in their different contexts?

2. How is inclusion as an aspect of social justice practised by teacher educators?

3. How is inclusion understood and experienced by teacher candidates in each of the three institutions?

I now move on to discuss the findings related to my first case.

6. 2 The Canadian University Policy Context on Inclusive Education

In this section I begin by providing an overview of the data collected from the Canadian university and then discuss my analysis of that data in terms of four orders of discourse shown below. These are the major discourses that emerged from the data that I found to be directly relevant to my research questions.

1. Discourses of equity and social justice;
2. Discourses of diversity;
3. Discourses of misrecognition;
4. Discourses of maldistribution.

Below, I discuss four documents from the Canadian university that were closely examined to attempt to answer the main research question and the sub-questions. Out of the many documents

available both online and in hard copy, I selected four documents which are outlined below. I chose these four documents because they dealt with issues that directly or indirectly related to my topic and to my research questions.

6.2.1 Document 1

Title: Equity and Inclusive Education in Ontario Schools

This document made available by the Canadian university is a Ministry of Education document entitled, *Equity and Inclusive Education in Ontario Schools: Guidelines for Policy Development and Implementation* (2009, Revised on April 22, 2013). This document was initially published as *PPM No. 119: Development and Implementation of School Board Policies on Antiracism and Ethnocultural Equity* (1993). This inclusion policy in Ontario is also supported by the *Ontario Human Rights Code* (1961), which sets out the prohibition grounds of discrimination and the Canadian Charter of Rights and Freedoms, in which the rights and freedoms which Canadians believe are necessary in a free and democratic society are outlined. The Ministry explains that their role is a supportive one: The Ontario Ministry of Education will support all school boards in the province in developing, implementing, and monitoring their equity and inclusive education policies by "providing practical strategies, advice, and templates in the guidelines" (Ontario Ministry of Education (OME), 2009b, p. 5). The policy requires all school boards in Ontario to develop and implement antiracism and ethnocultural equity policies. In contrast to previous policies that advocated discourses of multiculturalism, PPM No. 119 (OME, 1993) was constructed as a systemic policy approach to educational equity, covering multiple areas of education including "curriculum, learning materials, student assessment and placement, hiring and staffing, race relations, and community relations" (Anderson & Ben Jaafar, 2003, p. 9). While some school boards, most notably the Toronto Board of Education, had developed policies on race relations and multiculturalism, it was not until 1993 that the Ministry of Education formally mandated the development and implementation of an antiracism and ethnocultural equity policy, through Policy/Program Memorandum No. 119.

This policy (known as PPM No. 119) was developed to offer guidance and support to school boards and schools in Ontario in fostering inclusion in schools. The policy position of the Ministry of Education is that all boards of education in Ontario must have an equity and inclusive education policy. In the Policy Guidelines of 2014, it states that while the boards have the flexibility to determine their own approach consistent with their local circumstances, all school boards are expected to "embed the principles of equity and inclusive education into all aspects of their operations and learning environments in order to enhance support for students' achievement and help close achievement gaps" (OME, 2014, p. 13).

Inclusive education in this policy document is defined as "education that is based on the principle of acceptance and inclusion of all students. The goal is to ensure that students see themselves reflected in their curriculum, their physical surroundings, and the broader environment, in which diversity is honoured and all individuals are respected" (OME, 2014, p. 90). The aim of the equity and inclusive strategy is also to close student achievement gaps by identifying and eliminating any biases, barriers and power dynamics that may limit students' prospects for learning, growing and contributing fully to society. As a result, equity and inclusive education principles must be embedded in all board and school improvement plans as well as student assessment, evaluation and classroom strategies. In addition, schools are expected to give students and teachers authentic and relevant opportunities to learn about diverse histories, cultures and perspectives. In brief, the core guiding principles of the equity and inclusive strategy are as follows:

I. Equity is about meeting individual needs of students. It does not mean treating all students in the same way but, rather, responding to the individual needs of each student and providing the conditions and interventions needed to help them succeed.

II. The strategy should aim to identify and eliminate all barriers that limit the ability of students to achieve their full potential.

III. The strategy should promote and contribute to every child's sense of belonging (PPM No 119, 2013, p. 65).

The policy guideline acknowledges that certain groups in our society are not treated equitably because of individual and systemic biases related to race, colour, culture, ethnicity, religion and

sexual orientation. According to Dimitriadis (2012), among other things, the policy identified the causes of educational injustice as being rooted in social patterns of cultural representation. This policy was therefore an acknowledgement that educational structures in Ontario were mainly Eurocentric in perspective and did not take into account the viewpoints, experiences, and needs of other social groups like Aboriginal peoples and many racial and ethnocultural minorities (Dimitriadis, 2012). This view resonates with the recognition dimension of Fraser's social justice theory (Fraser, 2005a). Recognition in this sense means that it is unjust that some individuals and groups are denied status of full partnership in social interaction (Fraser, 2005). In the Eurocentric perspective alluded to, the institutionalised patterns of cultural value constitute some knowledges as inferior and some actors as simply invisible, hence as less than full partners in social interaction (Keddie, 2012). The result is that the contributions and viewpoints of members of racial and ethnocultural communities, as well as Aboriginal communities in this case are devalued and excluded. Through this Ontario equity policy, justice is served by giving positive recognition to these formerly marginalised groups through recognising different identities and cultures and ensuring that all students feel welcome and that appropriate conditions for learning and growth are in place.

The importance of this document in practice, according to the University's Chair of the Department of Education, is demonstrated by the department's insistence that it is part of the assigned readings for some courses for example the course, entitled, '*Anti-Discriminatory Education'*, and that they make sure all students are familiar with this document. Furthermore, when students are deployed to the different school boards in Ontario, although there is no assessment attached to familiarity with this document, it is expected that they familiarise themselves with the particular inclusion policy adapted by the specific school board from this document.

6.2.2 Document 2

Title: Policy on Equity and Diversity[1]

The *Policy on Equity and Diversity* is aimed at teacher education in the Canadian university. This policy asserts that it is guided by a strong commitment to social justice which means that "those who experience individual or systemic discrimination, for whatever reason, are provided with the means to overcome social and physical disadvantages, to the best of our ability" (Equity Policy, p. 2). The commitment to social justice is guided by two broad principles clearly stated on page 1 of the document:

1. Who we are and what we do will reflect the diversity of the communities we serve.

2. Everyone in our community and the communities we serve will be treated equitably.

This notion of social justice in this policy seems to resonate well with Tronto's ethic of care (Tronto, 1993). Tronto's ethic of care draws attention to the need for social and economic policies which recognise the need for all persons to have capacities, time and resources to maintain and nurture relationships that enable them to lead flourishing lives (Robinson, 2005). At the core of this equity policy is the recognition that some people are vulnerable and that there is a need to find ways of giving them attention through the values which guide our individual and collective behaviour (Sevenhuijsen, 1998). Such attention can be achieved through acknowledging diversity, and that each individual is differently located economically, socially, and culturally, with different life experiences, assumptions and frames of reference. This realisation that we are all different and positioned differently, and recognising the uniqueness of others can lead to mutual acceptance and understanding, as well as respect (Robinson, 2005; Anastasiou & Kauffman, 2011).

The policy also attempts to ensure that social justice principles are put into practice by enrolling and supporting a student body that reflects the diversity of the communities served by the university through processes for student recruitment, selection and admission. Questions about

[1] Name of document has been changed to protect anonymity of university. Document available on request from researcher.

representation are now increasingly crucial to any theory of social justice. This representation as part of the social justice framework (Fraser, 2009) includes measures to ensure that those who are marginalised enjoy a fair share of social interaction. Ideally, the equity policy should enable the empowerment of subordinated groups or individuals by recognising their fundamental human right to be represented and have a say in the decisions that affect them and their lives. Thus, other than committing itself to removing the barriers that prevent historically disadvantaged groups from realising their full potential, the department has also accepted the responsibility to create the equality of opportunities and outcomes enshrined in the Canadian Charter of Rights and Freedoms (1982) and the Ontario Human Rights Code (1961).

6.2.3 Document 3

Title: York Catholic District School Board (YCDSB) - Equity and Inclusive Education (2015) Policy No. 613

Policy No. 613 is an adaptation of the Ontario Ministry of Education *Equity and Inclusive Education in Ontario Schools: Guidelines for Policy Development and Implementation* (PPM No. 119). The goal of this policy is: "To provide direction and guidance with respect to the implementation of the Equity and Inclusive Education Policy and the effective oversight of policies, programs, procedures and practices" (YCDSB, Policy 613, p. 1). The board policy is grounded in social justice, a concept based on the belief that "each individual and group within a given society has the right to equal opportunity, civil liberties, and full participation in the social, educational, economic, institutional, and moral freedoms and responsibilities of that society" (YCDSB, Policy 613, p. 6).

This policy, among other things, provides a foundation and framework to meet individual needs, identify and eliminate barriers, promote a sense of belonging and incorporate the principles of equity and inclusion in the education system (YCDSB, Policy 613). The focus of the policy seems to be that genuine inclusion in education can only be achieved when conditions are created that allow all children to participate and to feel that they belong (Fraser, 2009). Its parameters include removing all barriers and forms of discrimination through the design and implementation of an inclusive curriculum. The policy also seeks to ensure that principles of equity and inclusive

education are incorporated and modelled in all professional learning activities and programmes, encouraging collaborative dialogue about equity and inclusion initiatives to support students with special needs. In all, the policy's primary focus is 'participatory parity'; it is concerned with factors that affect an individual's ability to participate on a par with peers therefore subjecting them to exclusion (Fraser & Honneth, 2003). The policy therefore attempts to address "the just allocation of social arrangements that permit all members of society to interact with one another as peers" (Fraser & Honneth, 2003, p. 36).

This policy's guidelines are also consistent with the broader guidelines set out in the Ontario Human Rights Code (2008) which in the preamble states that "it is public policy in Ontario to recognise the dignity and worth of every person and to provide for equal rights and opportunities without discrimination that is contrary to law, and having as its aim the creation of a climate of understanding and mutual respect for the dignity and worth of each person so that each person feels a part of the community" (p. 1). Policy/Program Memorandum No. 119 (2009) broadened the scope of No. 119 (1993) to take into account a wide range of equity factors, as well as all of the prohibited grounds of discrimination under the Ontario Human Rights Code and other similar considerations.

The policy takes a serious view of the many challenges that confront most marginalised school children including their 'dignity' and 'worth'. In Ontario these challenges would include the cultural barriers fuelled by racism, homophobia and intolerance toward those that speak English differently or do not speak it at all (Gay, 2004). Schools have to find ways of meeting the needs of these learners and ensure that the barriers are eliminated. This includes providing learners with access to a variety of instruction processes that are informed by and responsive to their cultural orientations and learning styles (Gay, 2004).

6.2.4 Document 4

Title: Equity Education - Course Outline[2]

This is a course outline summary for one of the main courses on the teacher education curriculum. The course enquires into a range of equity issues, and ways in which systemic oppression operates within K-12 schooling in Ontario and beyond. Among other issues, the graduate course examines individual and group differences that exist in schools and explores how these differences are constructed. It interrogates and addresses how marginalisation, oppression and discrimination are manifested in various spaces in the education system. In addition to issues of equity and equality, the orientation of this course takes on a critical pedagogy perspective (Giroux, 1998). The preamble invites teacher candidates to question and revise their teaching perspectives and practices. Teacher candidates are expected to commit themselves to pushing the limits in areas of human relations, inclusive education and anti-discrimination education through a university education that combines the cultivation of citizens with agency and courage. Some of the objectives of the course are to:

- Raise consciousness and understanding of the different ways that inclusion, exclusion and discrimination manifest in school settings in the country and beyond.

- Help teacher candidates examine their positions, beliefs and teaching practices in the context of societal inequalities in Ontario, Canada and beyond.

- Explore ways of challenging our classrooms and schools to be responsive in including all students into our everyday understanding and practice as teachers.

In what is clearly an approach rooted in critical theory, the course seeks to develop teacher candidates' capacity to interrogate and challenge multiple forms of discriminatory practices within education. This is clear from the introduction which describes its goal as examining:

[2] Name of document has been changed to protect anonymity of university. Document available on request from researcher.

> The ways in which systemic oppressions operate; and the interlocking social, economic and political (re)production of inequalities (including but not limited to race, class, gender, sexuality, ability, language, etc). The course develops pre-service teachers' capacity to interrogate and challenge multiple forms of discriminatory practices within education, seeking to develop pre-service teachers' understandings of theories and practices of pedagogies of liberation within daily life in schools.

Teacher candidates are urged to examine their role through a broader lens than just equity, to take into account the different ways in which culture, politics, and power shape the lives of both educators and students (Giroux, 2004). The ultimate goal for teacher candidates should be to produce learners who question the status quo and consider new ways of doing things differently. As the document clearly states, one of the goals of anti-discrimination education is to enable teacher candidates to develop a critical analysis of injustice, and the necessary skills and tools to work with others to "interrupt and change' patterns of oppression" (Bell, 2016, p. 4).

Significant is also the fact that the course materials include "Ontario Ministry of Education Curriculum documents" and "Realizing the Promise of Diversity, Ontario's Equity and Inclusive Education Strategy (2009)" and Board Policies on Equity and Inclusion for both the Toronto District School Board and the Toronto Catholic District School Board. All three policy documents, although there is no assessment attached to them, are assigned readings on this course.

6.3 Overall Critique of Documents

While the PPM No. 119 and its adaptation, Policy 613, were generated by the Ministry of Education and a school board respectively, the Policy on Equity and Diversity (2005) document and the course outline were generated by the teacher educators themselves. What is apparent from examining these four documents is that they are very explicit in terms of their focus on equity and diversity issues and in their effort to promote the fostering of positive cultural identities to support more equitable outcomes for marginalised students (O'Connor, 2014). One salient point is that for all the documents, the view of inclusion has clearly moved beyond just focusing on disability to including all structural inequities and barriers to access and opportunity in education. The policy documents, particularly the ministry and board policy documents have a lot of relevance especially in terms of the principles of acceptance and inclusion of all students and would certainly influence practice if enough attention was paid to them. As echoed by the participant interviews discussed

below, some students could now see themselves reflected in their curriculum in some of the institutions and their physical surroundings.

Yet, the strongest criticism against the Ontario equity policy is its failure to recognise the limitations of what counts as evidence of inequity (Dimitriadis, 2012). In focusing on identity politics and on the ways in which specific groups tend to be disadvantaged by the education system, the policy has steered away from the more controversial issues of wealth and power redistribution without which parity of participation is not possible (Keddie, 2012). According to Dimitriadis (2012), "these categories often present themselves as neutral and value free but the classification of knowledge is a power-laden process revealing some things and hiding others" (p. 56). This makes Fraser's distribution aspect of inclusion critical in any meaningful process of inclusion. While there is attention and recognition that vulnerability is a human condition and that some people are constituted as more or less vulnerable than others at different times and in different places (Tronto, 1993) in the equity policy, the issue of disparity in the distribution of resources is not given the same attention. Research evidence has repeatedly demonstrated the links between poverty and poor schooling, including early school-leaving and future economic deprivation and ultimately social dysfunction (Keddie, 2012).

Joshee (2012) makes similar observations about the policy documents, especially that these documents capture most of the common discourses of inclusion such as equity of access and outcomes, identity, equality and non-discrimination commonly identified in Ontario. And assuming that all teacher candidates are introduced to these policy documents, there is reasonable ground to believe that meaningful progress will have been made in terms of preparing current teachers for inclusive classrooms for both today and for the future. Joshee (2012) is concerned, however, as the board policies show that there is a preponderance of equity of outcomes expressed through an emphasis on closing the achievement gap which to some critics, is an indication of the dominance of a neoliberal accountability paradigm (Martino & Rezai-Rashti, 2012). In this view, the dominance of a neoliberal agenda tends to frame inequity of outcomes as one of the most significant systemic barriers but pays less attention to issues of poverty and racism which in this context are perhaps the most critical areas in terms of student achievement (Joshee, 2012). As the Policy Guidelines (2014) clearly state, the ministry's goal is to ensure that school boards embed the "principles of equity and inclusive education into all aspects of their operations and learning

environments in order to support students' achievement and help close achievement gaps" (p. 11). Altogether, there is a great need to pay equal attention to policies which recognise the need for all persons to have capacities, time and resources to succeed.

In this section I move on to discuss the five discourses drawing on both document data and interview data.

6.4 Discourses

6.4.1 Discourses of equity and social justice

The discourse of equity as a key aspect of inclusion and references to equity pervade all aspects of the documents that were made available in the Canadian university. Particularly, the documents address the key question of the study pertaining to the teacher educators' understanding and practice of inclusion. In addition, the documents also address the interview question relating to how the culture and processes of the institution or the wider policy frameworks enable or constrain effective practice of inclusion. After studying the different documents, it is clear that issues of equity and inclusion have emerged as priority areas in Canadian education, especially at teacher education level (OISE, 2011).

There is a clear emphasis on acceptance and inclusion of all learners and ensuring that all the other dimensions of equity such as eliminating any biases, barriers and power dynamics that may limit students' prospects for learning, growing and contributing fully to society are embraced. It is also noted that in this view, equity is not conflated with sameness; it is about meeting the individual needs of students and promoting and contributing to the students' sense of belonging. A positive and inclusive school climate is one where all members of the school community feel safe, included, welcomed, and accepted. There is a need for schools to provide students and staff with authentic and relevant opportunities to learn about diverse histories, cultures, and perspectives. Students should be able to see themselves represented in the curriculum, programs, and culture of the school.

The title of the second document is *Equity Policy* and equity is its key focus. The policy of the Department of Education is very emphatic about equity and expresses a commitment to help those who experience discrimination by providing them with the means to overcome all social and

physical disadvantages. There is also a need to remove the barriers that prevent historically disadvantaged groups from realising their full potential. The staff's goal is to ensure that everybody is "treated equitably" and that "social justice is promoted in all areas of the curriculum" (p. 1). Social justice is seen as a practice based on the belief that each individual and group within a given society has the right to equal opportunity, and full participation in the social, educational, economic, institutional, and moral freedoms and responsibilities of that society. Social justice and equity are used interchangeably in this document. The main goal for both the ministry and the board is to incorporate the principles of equity and inclusion in the education system. There are other references to removing all barriers and forms of discrimination as part of the process of inclusion but the core of the policy is ensuring principles of equity and inclusive education are incorporated and modelled in all professional learning activities and programmes and encouraging collaborative dialogue about equity and inclusion initiatives to support students with special needs.

The focus of the course is to inquire into a range of equity issues, and into the ways in which systemic oppression operates. The course advocates an aggressive approach to achieving equity and social justice by "building teacher candidates' capacity to interrogate and challenge multiple forms of discriminatory practices within education" and confronting all factors that influence both access and outcomes of education. The assigned readings for the course include both the equity policy documents from the board and the ministry.

In the interviews, all four teacher educators were asked the question: What is your understanding of inclusion? For all four participants, the issue of inclusion centred on equity. They thought that it was the responsibility of teachers to provide all learners with opportunities to engage in classroom discourse and to ensure that the voices of all students were seen to matter in the classroom. Equitable classroom practices do not mean students are treated equally but that learning experiences should be informed by knowledge of students' different experiences (Moschkovich, 2010). One teacher educator attached great significance to equity issues:

> *Equity issues would include disability, but they would also include questions of race, gender, sexuality, immigration status, language, geography. So, in my courses, whether I'm teaching on social justice in education, or whether I'm teaching research methods, it's always about equity.*

The teacher educator felt that it was the responsibility of teachers to provide all students with opportunities to engage in classroom discourse and to ensure that the voices of all students were seen to matter in the classroom. In this view, once again, justice is foregrounded through a focus on parity of participation and representation (Fraser, 2009). Most respondents showed commitment to challenging narratives and practices which sought to marginalise certain groups and ethnic identities and have put in place equitable practices informed by their knowledge of students' experiences and their educational backgrounds. As another teacher educator put it:

> *So that can only occur if we teach through a social justice lens, through equity-mindedness and through understanding that we really need to challenge the status quo out there and understand that all our students bring with them unique individual personal narratives. We can't assume that every child comes to school with a full belly, a full breakfast, right?*

These participants thought that equity and social justice should be key goals for education, and that it was important for teachers and schools to actively challenge the significant levels of disadvantage and discrimination that characterise life and school experiences for most children today. Underlying this is the general recognition on the part of the teacher educators and teacher candidates of the systemic inequalities faced by racial and ethnocultural minority students in Canadian education (Luke, Green, & Kelly 2010; Martino & Rezai-Rashti, 2012). From the participants' definitions and narratives, equity and justice meant the efforts that ensured that social arrangements within the education system did not prevent some students from participating on par with others (Fraser, 2005). The goal of inclusion should be part of a deliberate process to redress inequalities of power and hierarchical social relations with a view to benefiting the disadvantaged groups of students (Ainscow, 2005; Slee, 2006). Equitable classroom practices refer to the things that teachers put in place to broaden participation in order to provide all students with opportunities to take part (Gutierrez, 2012). One teacher candidate had this to say about inclusion in her definition:

> *Inclusion is about removing the barriers that stand in the way of learning for all students and making sure that all children have equal access to opportunities of learning. As teachers, we should always make sure that all our students feel safe and comfortable and not feel excluded. We must create an environment that make all students feel welcome.*

Teacher educators also talked about the importance of representation as a key aspect of inclusion. Representation is concerned with procedures that structure public processes of contestation and ordinarily take the form of political voice (Fraser, 2009). In the context of inclusion, this would bring attention to structures that constrict or enable individuals or groups to have a voice in order to be able to have influence on decisions which affect their lives. A teacher educator in the Canadian university had this to say:

> *Inclusion involves not only the idea that everyone is welcome in a space but the idea that space is created through collaboration, in that questions of power and advantage, and disempowerment and disadvantage and advantage can be addressed out loud and dealt with.*

Collaboration here implies including and involving all those who are part of this discourse, which would inevitably give voice to all those who are involved. This further suggests that not only are educators and their students involved in the discussions about power and advantage, but that all these people are part of the process of creating the space that makes that possible. Going further to speak about the particular context of their institution, a teacher educator had this to say:

> *We have underrepresentation of a lot of different people, so we don't have enough people of colour in our programme, specifically we don't have African-Canadian men in our programme or African-Canadian women. So, we do not adequately support inclusion.*

The problem of underrepresentation emerged prominently at this point and the crucial issue was that because certain groups were notably unrepresented, there was no way they could have a voice in how the system was run and there was no possibility of these groups influencing the discourses about inclusion, or teacher education in general. For example, in the view of one participant, the marginalised groups were underrepresented partly because they did not have the required financial resources. This problem of underrepresentation is examined in greater detail under the retroductive analysis section below.

6.4.2 Discourses of diversity

I looked through all the documents that were made available to me in the Canadian university for this discourse section. It emerged that the word ‘diversity’ was central to the different understandings of inclusion in this institution. Most documents made reference to diversity as an

aspect of equity. The Policy Guidelines for the implementation of PPM 119 talks about building an environment "in which diversity is honored and all individuals are respected" (p. 90). The different documents contain multiple references to "diverse backgrounds and diverse identities". The policy document recognises the changing context of education in Canada in terms of the demographics (Statistics Canada, 2011) as a result of the increasing numbers of immigrants. These changes in the demography necessitate a new approach to teacher education to ensure that the teachers are aware of the different backgrounds and identities they have to deal with (Cochran-Smith, 2005). This situation requires teacher educators to produce pre-service teachers who are aware of and ready to challenge the sociopolitical context within the field of education and beyond (Cochran-Smith, 2004). This new paradigm frames teaching as a "political act" and teachers as advocates for all learners and social groups (Katsarou, Picower, & Stovall, 2010) whose responsibility is not simply to teach learners in equitable ways but also to be activists for their students (Marshall & Klein, 2009).

One of the prominent lines in this policy document emphasises the need to move from the existing Eurocentric focus of education which has "the effect of limiting the contributions of people from a variety of different backgrounds and excluding the experiences, values, and viewpoints of members of racial and ethnocultural communities, as well as Aboriginal communities" (2013, p. 11). The policy underscores the importance of the right of students from diverse cultural and economic backgrounds to see themselves reflected in the curriculum if they are going to be able to develop self-esteem and a sense of belonging in the same ways as their mainstream peers. Diversity in this context of higher education speaks to recognitive justice (Fraser, 2009) which requires teacher educators to have a deeper understanding of the different knowledges, values and understandings that all students bring to university (Kelly-Jackson, 2015), with the goal of encouraging and enabling more and different kinds of students to access and participate in higher education.

The Policy on Equity and Diversity document also emphasises diversity, making the core of its social justice agenda the need to make sure that "who we are and what we do will reflect the diversity of the communities we serve" (Equity Policy, 2005). This vision of diversity would be realised through insisting on enrolment of a diverse student body and adoption of a culture and curricula which take into account the diversity of the student demographic.

Diversity also emerges as the key discourse fragment in the interviews. Diversity is similarly used to refer to all kinds of differences between learners including cultural and linguistic differences. Most participants noted that inclusive teaching needs appropriate skills and materials to teach diverse student populations and meet the diverse learning needs of the different categories of learners. Diversity here refers to addressing not just issues of disability but encompassing other axes of disadvantage like race and class and other needs arising from learners' cultural identities. Teachers should be prepared to work with all types of students including those who have experienced marginalisation both in school and society. As one teacher educator put it:

> *And you have to also have knowledge about the different kinds of people who might end up in your classrooms and how you can help them. So that includes issues around culture and language development, around psychological experience, around mental health and wellness, as well as knowledge about subject matter and knowledge of challenges they have experienced.*

The point is that teacher educators have to prepare themselves for very diverse learners. As Shyman (2015) puts it, the school environment has to be enhanced to suit all individuals regardless of their exceptionalities; regardless of their background or personal circumstances. Some teacher educators emphasised that teachers should seek to enhance the schooling environment for all individuals regardless of their exceptionality. Teachers need to understand that teaching and learning are always particularistic because they are inseparable from social and historical contexts (Gay, 2004; Banks & Banks, 2009), and whatever the level, teaching and learning occur in socio-historical and community contexts. This means that teachers and educators should always take into account the different sociocultural contexts that students come from. Speaking in the context of teacher education, one Canadian teacher educator had this to say: "*I think that any teacher education that doesn't consider the particularity of the student and their cultural particularity, their historical particularity, their historical context, is not worthy of that name*". It is important to give attention to recognising and valuing difference and providing opportunities for equal participation by planning for the variability of each student and developing a vision which acknowledges that all children are equal members of a school (UNESCO, 2015b), including those students with the most pronounced support needs. Emphasising the importance of teaching for diversity, another teacher educator argued that diversity should look beyond identified disability to include a whole range of learners' needs. Children of new arrivals to Canada need a lot of

support in order for them to acclimatise as they struggle with a new language in most cases and a new culture:

> *They need active support to help them acclimatise. And what does the support that someone who has an identified learning disability, for instance, need, compared to a child that's come from a country that's been at war and has come here as a refugee? They have completely different experiences. And yet they both need – you can't claim that you are giving anybody inclusive education unless you treat those cases differently. And – but also treat them – I mean you have to support them – give them support, but the kind of support is very different right?*

The same teacher educator went further by emphasising that the fundamental responsibility of the teacher education programme was to produce teachers who were able to work with students of backgrounds that were different from their own. This could be achieved by making sure that all the graduates understand the complexity of the world that exists outside their own. This is akin to what Barnett calls 'supercomplexity'. According to Barnett (2000), the situation of higher education today has become supercomplex as it is "not just a matter of handling overwhelming data and theories within a given frame of reference (a situation of complexity) but also a matter of handling multiple frames of understanding, of action and of self-identity" (p. 6).

In view of this, there is a need for teacher educators "to widen the frames of knowing and they have to engage with the widest range of audiences; they have to become different beings" (p. 151). As one teacher educator stated:

> *And I think to do that well, you have to talk about these issues, you have to have a fundamental kind of social justice perspective on the whole. And you have to also have a lot of knowledge about the different kinds of people from different parts of the world who may end up in your classrooms. So that includes issues around culture, and language development, around psychological experience, around mental health and wellness.*

Most teacher candidates also repeatedly made references to diversity in their definitions of inclusion. It was evident that the notion of a diverse student population was a reality that most of them were very familiar with. In her definition, one teacher candidate said:

> *Inclusivity means that students are made to feel that they belong to the class as much as everyone and that they are safe. As teachers we should embrace diversity. For example,*

> *here in Canada we have very diverse groups of learners but to be inclusive we must look beyond the learners' differences and make sure all students have equal opportunities to learn and to participate.*

Teacher candidates, just like their educators, acknowledged the diversity in the classrooms in most schools and most of them thought that inclusion was about making sure that all these students should be made to feel a sense of belonging in spite of their different cultures and different backgrounds.

6.4.3 Discourse of misrecognition

Teacher educators were responding to the key question about their understanding of inclusion, but also went further to address the question: In what ways do teacher educators model inclusion for their students? While the documents did not raise issues pertaining to misrecognition, the interviews extensively focused on recognition as a key aspect of inclusion. Analysis of interview data revealed that all four teacher educators attached a lot of importance to cultural recognition, or misrecognition, as a key component of inclusion. One teacher educator had this to say about inclusion:

> *It's about feeling, belonging to a group, to a culture, to a community. … For me, inclusion is really about everyone feeling that they really truly belong in an authentic way and that their voice is heard, and they are validated and that their identities are celebrated.*

Teacher educators gave narratives of how some students struggled with issues of cultural recognition. Because they felt that their cultural identities were not embraced, they could not build a sense of belonging and so they always felt like outsiders. The discourse of cultural recognition might take different forms in the different contexts, but there was general agreement that there are many social groups whose cultural repertoire has been historically silenced and people and groups who have been forced to suppress their own cultural ways of being in order to conform to the norms of the dominant culture (Luckett & Mzobe, 2016), usually at the expense of the victims' own identities. A focus on student identity for teachers means providing opportunities for students to draw on their own linguistic and cultural resources, which would enable them to judge themselves by their own standards, and to understand the world on their own terms (Gutiérrez, 2012).

As pointed out in Chapter Four, the issue of recognition primarily is that it is simply unjust that some individuals and groups are denied status of full partnership in social interaction (Fraser, 2005). This partly comes from the recognition that not all injustice and inequality have to do with socioeconomic factors, but with social and cultural structures that generate relations of exclusion, oppression and inequality. Recognition focuses on the actors, their identity configurations and the way in which certain institutionalised patterns of cultural value constitute some actors as inferior or simply invisible, hence as less than full partners in social interaction (Fernandez, 2011). One teacher educator described personal experiences of alienation as she struggled to belong in a dominant culture which completely refused to embrace who she was. She said:

> *I was the only non-white person in my entire community. I was the only non-white student in my entire school so I would never have brought chopsticks to school. I know that's a very low level, okay, but I would never have brought my food to school. I would never have felt comfortable to share or to really live my Asian cultural norms or bring them into my school life because to me that was not part of the norms of the school, right? ... so, I never felt included in an authentic way.*

The teacher educator went further to describe how she helplessly watched her East Asian culture erode as a result of the alienation and exclusion she was experiencing:

> *But on the other – unfortunately, I felt that my East Asian culture was eroding because I didn't feel that that could've been … that was not embraced. It was questioned, it was looked down upon, it was "why do you eat those things?" I always felt, personally, as an adolescent going through a very vulnerable stage in my life, that I never belonged, I just … because I looked different, I lived differently than others.*

Another teacher educator similarly drew attention to the tacit privileging of certain social practices and norms, while others are de-legitimised but articulate it more in terms of power and disadvantage. For him, the European influence in Canada was severe and involved a project of trying to kill cultural aspects of the indigenous peoples, to recast and retool indigenous children in a European image. That is why there is a need to challenge structural conditions that alienate and demean others and that ultimately reduces life opportunities for individuals and communities. For that reason, the starting point is to evolve change strategies that address the fundamental issues of power relations and power structures and the social patterns of representation and interpretation. He said:

> *It does not begin with the idea that there is equal space for all, but the idea that space is created through collaboration, in that questions of power and advantage, and then disempowerment and disadvantage are taken out critically in collaboration and among people.*

This educator was even more passionate about how education has been used to exclude indigenous social groups not only in Canada, but all across the world. He argued that most institutions still bear the inequality markers of the past that continue to operate in constraining ways – both through the rules of participation that regulate classroom ecologies and the dominant knowledge systems encoded in the curriculum (Boylan, 2010). He drew attention to the failure of dominant discourses and practices of schooling and education in different countries to recognise and validate multiple knowledges and educational practices:

> *We have to look at questions of indigeneity … a look at indigenous knowledge and history and experiences shows them having been traditionally marginalised in schooling. We want to incorporate indigenous views, culture, contemporary perspectives. We want to celebrate and incorporate a lot of those perspectives in order to make the schooling context more inclusive of these pieces.*

This perspective was supported by yet another educator who argued that misrecognition creates conditions which position students in ways which compromise both individual and collective agency. Most students who look different from the dominant group usually experience a cultural system and curriculum that devalue and negate their cultures, histories and identities, and they ultimately position themselves as culturally deficient (Luckett & Mzobe, 2016). Another educator said:

> *Kids cannot learn until they feel safe, until they feel that their identities are recognised and validated and appreciated. That's so significant because every child needs to be able to see themselves reflected in the curriculum. Whether it's storybooks that you choose, whether it be the topics that you choose.*

In Canada these observations have arisen firstly from concerns about indigenous people who continue to suffer exclusion on every major front (economic, social, political and cultural), because of the legacy of a long running political system that was explicitly designed to assimilate them and eliminate their culture (Subramanian, 2017). Aboriginal people rarely see their true selves reflected in the curriculum, classrooms and in pedagogy, and their children continue to lag behind the rest of the Canadian population (Statistics Canada, 2011). Besides, all the other students, especially

those from low-income groups, have a higher risk of dropping out of the school system than their affluent counterparts (Brown, 2006). For most of the participants, it was imperative that the school system transforms the curriculum and pedagogy into something that casts positively the identity positions of those who have previously been mis-recognised or routinely maligned.

Another teacher educator insisted that societal inequality should be recognised as an important force that needs critical interrogation and that teachers need to work to establish societal change as part of their role as public servants. In view of existing colonial education paradigms, there is a need now for the values and aspirations and knowledges of the formerly marginalised to take their rightful place in the curriculum. This is why teacher education curricula have to start looking at a number of markers of this imbalance and ask these fundamental questions:

> *Are African-Canadian students attending post-secondary at rates equal to their non-black peers? If you take a look at all the populations that are marginalised; if you were to look at LGBTQ kids, if you were to look at indigenous kids; are they dropping out of school at a higher rate than their peers? Are kids from low income households, are they overrepresented in what we call applied streams, or in courses that are for a workplace rather than university? All of those pieces….*

Most participants noted that it was vital for teachers to be critically aware of the cultural-historical legacies of disadvantage that permeate schools and social institutions. As another educator explained, there were students who had not been able to get access to particular forms of cultural capital and struggle with absence of fit between middle-class expectations of schooling and working class culture:

> *And so, part of my practice is to be really, really attentive and supportive of my students who aren't white middle-class women, middle-class being key. Like who are first generation university students, who might have different ways of relating to me because they don't know, like, the code of how you behave in a very like Eurocentric institution, or in class. So that's a key part of my practice; is like individualised supportive mentorship for my students who teacher education hasn't wanted.*

This teacher educator felt strongly that teacher education in Canada and in North America and other places, has reproduced itself as a largely white women's profession and needed to be transformed to accommodate those who were previously marginalised. This is also confirmed by research which has shown that many North American educational systems still favour and advantage applicants with predominantly white Western European backgrounds, despite calls for

admissions reform, and notwithstanding the presence of increasingly heterogeneous school populations (Thiessen, 2000). As a result, most institutional structures reflect the same dominance of whiteness that is seen in the larger society (Cochran-Smith, 2004, 2005). This is also supported by another teacher educator who described how the exclusionary culture in teacher education has often seen teacher candidates from minority groups pull out of the programme prematurely because they realise, they cannot find a space to belong and there was hardly anything they could identify with:

> *I mean it is part; part of it is how we produce the teachers but it's how we reproduce the colonial culture that you know. For instance, I've had indigenous students and some young black men over the years who've come and tried to be students here and who've had to leave. And you can feel, it's like … they're angry and they're hurt. But they're hurt in a way that we can't heal as an institution. All of those things we do are actually … can damage certain people; they experience them as painful and … oppressive.*

To be inclusive therefore, educators should strive to create environments that connect with the funds of knowledge specific to marginalised groups in order to support participation and achievement of students from these backgrounds. Teacher education should include critique of universalistic views of knowledge which do not adequately account for the knowledge, traditions and experiences of marginalised groups (King, 2008), and confront all other cultural biases and practices in the curriculum.

6.4.4 Discourse of maldistribution

Most participants raised the issue of maldistribution in their definitions of inclusion. Maldistribution refers to the inequitable distribution of resources and the damaging effects of such maldistribution. (Fraser, 2008; Fernandez, 2011). This economic dimension refers to the disparity in the distribution of resources and therefore seeks to address injustice in the economic structure of society including exploitation and economic marginalisation (Fraser, 2005). The problem of poverty and scarcity of resources was viewed as a major source of exclusion by the participants. However it was clear that it was experienced differently among the different groups in Canada. As one teacher candidate put it:

> *We can talk about equity and all the stuff. But it's not always the same everywhere. If you look at the reserves (First Nations), nobody talks about it, but things are bad. No*

> *electricity, no running water. No place to study. How is someone supposed to study? Even here in Toronto, children are going hungry.*

There was general consensus that the benefits of schooling were unfairly distributed amongst young people according to their families' race and economic circumstances and different participants spoke at length about the damaging effects of inequitable distribution of resources, but these barriers took different forms in the different contexts. Most teacher candidates agreed that in spite of Canada's claims to equal access to education, the experiences and outcomes of students differ greatly depending on their family incomes and particularly among First Nations as a group. Research has repeatedly drawn attention to the inequalities in First Nations reserves and how this situation deserves particular attention (Parkin, 2015) because of the profound ways in which income inequality impacts educational attainment. There are reports of unacceptable physical conditions in First Nations schools that include broken plumbing and frigid classrooms which learners and their teachers have to work in. These physical deficits are often exacerbated by the absence of well trained teachers and insufficient teaching and learning materials (Parkin, 2015). The result, inevitably, is that these students and other students from low income groups account disproportionally for unsuccessful students throughout the system (Portelli, 2013).

The teacher candidate participants expressed concern at how benefits of schooling were still unfairly distributed amongst young people according to their race and the economic circumstances of their families, and how the same patterns of wealth and poverty in the larger society were reproduced in education. This was apparent even by just looking at the teacher education programme alone:

> *I think we have questions in terms of who accesses our programme … folks who can't afford it. We have an underrepresentation of a lot of different people, so we don't have enough people of colour in our programme, specifically we don't have enough African-Canadian men in our programme, or African Canadian women. We don't have enough indigenous students.*

Although there could be other variables at play in the system, it was evident that the representation of marginalised groups on the teacher programmes still left a lot to be desired. Even for those students already on the programme, there was not enough time and resources to enable adequate preparation of teachers as articulated in the departmental document. Education has become a central issue in Canada, as its Aboriginal population is considerably underrepresented on college

and university campuses (Tomaszewski, Powell, Gallop, London, & Gyles, 2011). There are always financial constraints attached to any decision that is made about improving the training of teachers:

> *We want to have an excellent programme. You don't have an excellent programme unless you do all of it well. It's not just the subject matter or the pedagogical content knowledge. We have to be able to offer both wide course experience. … But I mean, my own belief is that, fundamentally, we've got ourselves to a point, certainly in the west and certainly in North America, where all of our decisions are based on financial constraint. And this is the kind of neo-liberal thing where we, now, unless you can justify whatever it is, we are not going to do it. And school boards, you know, have a lot of their monies cut and schools have a lot of monies cut.*

One thing that was evident in the above discussion on discourses was that they often overlapped. The same groups that are marginalised economically inevitably experience cultural misrecognition and misrepresentation.

6.5 Retroductive Analysis - Historical Injustice

After discussing the four discourses that emerged from the Canadian university above, I applied retroductive analysis on the same teacher education data in that institution using the question below.

- What must the world be like for inclusion to be understood predominantly in terms of equity and recognition?

While Canadian history has never really been framed in apartheid terms as was the case in South Africa, the discriminatory practices of its institutions were largely driven by the same ideology of white supremacy, especially in the treatment of indigenous people (Hutchings, 2016). For centuries up until the 1990s, indigenous peoples were subjected to systemic and systematic abuse and cultural genocide (Schiffer, 2016). Particularly, education in the residential schools was used as an instrument to denigrate native culture while forcing native children to embrace Euro-Canadian white identity. Children were removed from their families and subjected to an educational system that centred on assimilation and acculturation to Eurocentric knowledge (Deyhle & McCarty, 2007) while at the same time it despised their histories, heritages and cultural antecedents (Neeganagwedgin, 2011). As Walks and Bourne (2006) point out, Canada has always managed to

portray a mythical perception of its identity as one built on equality and inclusion, yet repression and discrimination have always been a pervasive social reality for its minority groups. Thus, in spite of the significant transformation that has occurred in education over the years, racism remains a barrier to equal access to educational achievement.

Even today, while in principle openly stated assimilationist policies of the 70s have been abandoned, "assimilation remains an unspoken but powerful ethos at all levels of schooling ... through the logical consequences of a racialized schooling system" (Elliot & Fleras, 2010, p. 335). In the educational sphere today, many barriers and biases directed against racial minorities, whether immigrants and their children or indigenous peoples, are still in place. Historical oppression has continued to have a massive impact on the current living conditions of indigenous people in Canada. There are still a lot of barriers and biases targeting racial and ethnic minorities which make it hard for members of these disadvantaged groups to get good quality education which in turn affects their place in mainstream society. Those who live in the reserves face a unique set of barriers including access to healthcare, inadequate housing and education. In the urban areas, indigenous people are often unable to obtain education or employment due to factors such as systemic discrimination and racism, very high levels of poverty and differences in culture. In most provinces, indigenous students make up the highest number of school dropouts, and the highest number of children that come from poverty backgrounds (Parkin, 2015).

Canada also has problems pertaining to immigrants as a group. It is a fact that over the last three or more decades, there has been a dramatic demographic shift which has significantly changed the racial, cultural and linguistic diversity of the student population in the Canadian school system (Brown, 2006). This has created extraordinary challenges for policy makers and exerted a lot of pressure on the whole education system to find ways to effectively educate large numbers of students who are culturally different and whose mother tongue is different from the dominant language (Miller et al., 2009). As Banks (2001) aptly puts it, Canadian teachers are faced with "a demographic imperative … to find teaching approaches that ensure all children succeed, which requires teachers using knowledge about the social, cultural and language backgrounds of their students ... in order to diminish educational disparities" (p. 233). Furthermore, research has repeatedly demonstrated that, because most immigrant children in the school system experience huge structural and instructional barriers, they are disproportionately represented in educational

underachievement and in dropout rates (Brown, 2006). Canadian teachers therefore have found that they are not only having to deal with students with diverse abilities, but with more and more students who have varying degrees of familiarity with school contexts they find themselves in.

These developments have led to the realisation that the new immigrant situation cannot be dealt with using the same one-size-fits-all approaches. It also led to the recognition that inclusion could be a critical component in education today (Brown, 2006). In this regard, teachers and teacher educators would both need to re-examine their beliefs and values about teaching and learning so that they can be more responsive to diversity. Teachers would also need to re-evaluate and to reorganise their curriculum and pedagogy to respond to the changed composite of students they teach. As Nieto (2009) posits, teachers do not only need to challenge conventional approaches but also to develop a passion for social justice.

Overall, this situation has given substantial momentum to the adaptation of curricula in line with, for example, Ontario's equity and inclusive education strategy which essentially calls for the adoption of practices that support learning environments where all students feel engaged and empowered (OME, 2013).

6.6 Conclusion

There is a need for those who are traditionally disadvantaged to gain access to equality of opportunity. Equity requires that Canada works on removing barriers and biases in the school systems to ensure that members of all social groups have equal access to educational opportunities (Elliot & Fleras, 2010). In the context of retroductive analysis, these fundamental structures and mechanisms are the conditions that continue to influence the discourses of inclusion and the choices that have to be made to transform education.

CHAPTER SEVEN: KEY FINDINGS: SOUTH AFRICAN UNIVERSITY

7.1 Introduction

In this second institution, participants were asked to respond to the same research questions as outlined in 6.1 in Chapter Six. I was able to interview three teacher educators as planned and did a focus group interview with eight teacher candidates. All three teacher educators were females and all of them taught some courses on the teacher education programme. As detailed in Chapter Five, I also examined the different documents availed to me.

7.2 The South African University Policy Context on Inclusive Education

In this section I begin by providing an overview of the data collected from the South African university and then discuss my analysis of that data in terms of five orders of discourse that emerged:

1. Discourse of equity and social justice;
2. Deficit discourse;
3. Discourse of diversity;
4. Discourse of misrecognition;
5. Discourse of maldistribution.

I start by looking at three documents from the South African university that I closely examined to attempt to answer the main question and the sub-questions. Although many documents were made available for examination, I eventually focused on three. Once again, the key consideration was that these documents were relevant to my topic and my research questions. I looked at the *Education White Paper 6* analysed below which was made available but is also available online. The *Education White Paper 6* was particularly important because it is the document that defined the path for South African higher education with regards to inclusive education following the advent of 'democracy' in that country (South Africa. DoE, 2001). I then looked at a module entitled 'Teacher Education Module 1'. This looked like the major resource in the education department with regards to the topic of inclusion. I also attached a lot of importance to this document because it is a document generated by the education department and as explained below, focuses specifically on inclusion and special needs. Then I examined several documents which dealt with differentiated instruction which were made available by the education department but in the end,

I settled on one document entitled 'Teacher Education Module 2'. In my view, the teacher education department viewed differentiated learning as a particularly important aspect of inclusion.

7.2.1 Document 1

Title: Education White Paper 6: Special Needs Education: Building an Inclusive Education and Training System

The *Education White Paper 6* is the policy framework which outlines the Ministry of Education of South Africa's commitment to the provision of educational opportunities, in particular for those learners who have experienced or continue to experience barriers to learning and development or who have dropped out of formal schooling because of the inability of the education and training system to accommodate the diversity of learning needs. Firstly, the policy firmly places its vision in the context of South African historical experiences by noting that there was an inequitable distribution of access and opportunity for students along lines of race, gender, class and geographical location, and there were also gross discrepancies in the participation rates of students from different population groups. As a result the goal of the department of education was to create a non-racial and non-sexist system of higher education that would promote equity of access and fair chances of success for all who are seeking to realise their potential through higher education, while at the same time eradicating all forms of unfair discrimination and advancing redress for past inequalities (Ferri, 2015).

This framework makes a distinction between mainstreaming and inclusion and this distinction is important because sometimes the term "inclusion" is used in ways that are reminiscent of the idea of integration (Hodkinson, 2012). Mainstreaming is about getting learners to 'fit into' a particular kind of system or integrating them into an existing system, while inclusion is about recognising and respecting the differences between all learners (South Africa. DoE, 2001). It is significant that the *Education White Paper 6* distinguishes between mainstreaming and inclusion in a very detailed way to help educators understand the view of inclusion that was envisaged by the document and the policy makers. According to the *Education White Paper 6*, inclusion goes beyond formal access to include social inclusion, curriculum accessibility and emotional inclusion and rejects

rigid curricula, prejudice and discrimination against particular individuals or groups and negative stereotyping of girls and other marginalised groups. (South Africa. DoE, 2001).

7.2.2 Document 2

Title: Teacher Education Module 1

According to the introduction of the module, the purpose of this module was to assist teacher candidates to reinforce their existing knowledge regarding barriers to learning and to embrace the concept of inclusion. Among others, the main objective of the lectures outlined in this module was to equip beginning teachers with knowledge of inclusive education and to understand the nature of special needs (Module 1, p. 2). In this module, inclusive education means:

> Schools should accommodate all children regardless of their physical, intellectual, social, emotional, linguistic or other conditions. This should include disabled and gifted children, street and working children, children from remote regions or nomadic populations, children from linguistic, ethnic or cultural minorities and children from other disadvantaged or marginalised areas or groups (Module 1, p. 2)

Further, the module document notes that inclusive education ensures the presence, participation and achievement of all learners in schools and involves restructuring the culture, policies and practices in schools so that they can respond to the diversity of learners in their respective areas. The module also emphasises the issue of inclusive education as a social issue based on rights. Lastly, the module makes reference to the South African Constitution as the basis for the principle of inclusion and to the *South African Schools Act* and the *Education White Paper 6* as sources where the policy of inclusion is outlined. In brief therefore, inclusion is viewed as a commitment to educate all learners regardless of learning barriers. An inclusive approach acknowledges that all learners need support, so teachers should try to ensure the presence, participation and achievement of all learners in the school. Inclusive education acknowledges and respects differences in learners regardless of gender, ethnicity, language, disability and social status (Module 1, p. 3).

The module then looks at a wide range of issues covering many types of barriers to learning. The main distinguishing feature of this module is that it begins with a specific focus on the issue of inclusion and attempts to expand on the different meanings of inclusion. However, after a few pages, the module shifts entirely to focus on types of disability and how to overcome barriers

arising from them. This could suggest the usual phenomenon of conflation as is the case in many countries, where inclusion is most frequently connected with an agenda around the education of persons with disabilities (Hardy & Woodcock, 2015).

7.2.3 Document 3

TITLE: Teacher Education Module 2

This module defined differentiated learning as "an organised, yet flexible way of fine-tuning teaching and learning to meet the learners where they are and help all learners achieve maximum growth as learners" (Module 2, p. 2). The mantra of this approach is that, "If learners are not learning the way we teach them then we must teach the way they learn" (Module 2, p. 2). In most systems, differentiated instruction is now conceptualised as teachers' responses to the diverse learning needs of their students in mainstream classrooms (Tomlinson & McTighe, 2006). It is also viewed as a teaching theory, based on the premise that instructional approaches should vary, and curriculum should be adapted n to individual and diverse students in classrooms (Tomlinson & Moon, 2013). Some of its key aspects include differentiating content by modifying what learners are supposed to learn, differentiating processes which refer to classroom activities and differentiating products which means providing different ways for learners to demonstrate what they have come to know and are able to do (Tomlinson & Moon, 2013; Wormeli, 2007). Because differentiated learning focuses on academic aptitude, it requires a systematically planned curriculum and instruction that can meet the needs of academically diverse learners (Valiandes, Neophytou, & Hajisoteriou, 2018).

Advocates of differentiated learning argue that instructional differentiation can promote equity (Valiandes et al., 2018) because it recognises that learners have differences in experiences, content knowledge, background knowledge and socioeconomic backgrounds. The differentiation of instruction shares a common philosophy with inclusion that aims to provide all students with the opportunity to learn, regardless of sociocultural or educational barriers. According to Valiandes et al. (2018), differentiated learning emerges as part of the reform effort aiming to individualise education in order to achieve equity. Differentiation was consequently coined as the pedagogical response to cater for the needs of all learners in mixed-ability classrooms in mainstream schools.

This is important because then teachers cannot just assume that all learners are starting from the same place in the curriculum and continue at the same pace (Wormeli, 2007). Other advocates have also argued that differentiated learning is an important aspect of inclusion. Successful implementation of the practice of inclusion can be achieved by fusing the concepts of differentiation and inclusion and moving educators closer to the ideal of instructional equity in meeting the needs of all learners in the general education classroom (Valiandes et al., 2018).

7.3 Critique of Documents

In my view, the documents addressed the key questions of the study: How is inclusion understood and practiced in teacher education in South Africa? The first two documents from this institution, that is the Teacher Education Module 1 and the *Education White Paper 6* show a relatively clear perspective of inclusion as understood by both the education department at the university and the Department of Basic Education. As was noted earlier, the *Education White Paper 6* articulated 'equity and redress' as among its fundamental principles (South Africa. DoE, 2001). Its provisions address the extent of structural inequality in the broader society and the contribution of history and culture to the present and provides an early indication that equity was to be more central to higher education policy (Badat, 2013). Its main concern was to make higher education more socially equitable and to promote social equity more generally by providing opportunity for social advancement through equity of access, opportunity and outcomes (Badat, 2013). This position resonates with Fraser's notion of equity of access as a dimension of participation parity (Fraser, 2005). In the context of higher education, it could mean that a student's prior background should not determine their chances of access or their chances of completing a programme successfully (Shay, 2016).

For the Teacher Education Module 2, while one of the key ideas that emerged was that inclusion should ensure the "participation and achievement of all learners in the school" and involves "restructuring the culture, policies and practices" so that the schools can "respond to diversity" (Module 2, p. 2) the larger focus seems to align with differentiated instruction. The module does acknowledge that "working with diversity demands that each history, culture, knowledge, and

experience be acknowledged and appreciated such that all learners feel a sense of value and welcome, and are able to develop a feeling of ownership and belonging in their schools" (Rolheiser, Evans, & Gambhir, 2014), yet its summary of core concepts of inclusion focuses on the following:

- Learners have a wide diversity of characteristics and needs;
- Difference is normal;
- Child-centred teaching is central to inclusion;
- Flexible curricula should adapt to learners, not vice versa;
- Inclusion needs proper resources and support.

My analysis sees such a view of inclusion as aligning itself more to differentiated instruction than for example, inclusion as defined in the *Education White Paper 6*.

Teacher Education Module 2 presents a different perspective from the *Education White Paper 6* but remains significant because its focus seems to resonate more with the conceptualisations of the majority of teacher educators. Unlike the other two documents, its focus is on academic aptitude, and the systematic planning of curriculum and instruction so that it can meet the needs of academically diverse learners (Valiandes et al., 2018**)**. It is true that some of its tenets include recognition that learners will have differences in experiences, content knowledge, background knowledge and certainly economic background, and that all learners do not start at the same place in the curriculum (Wormeli, 2007). It is also true that differentiated learning promotes acceptance of differences and emphasises the creation of a conducive environment where all learners feel safe and comfortable. It also acknowledges that learning is influenced by a variety of factors and can occur in many different ways. Furthermore, one of the strengths of differentiated learning is that it also differentiates content, process and products to accommodate different performativities and aptitudes.

Yet its major limitation is that it is not cultivated to challenge the structural inequities and barriers to access and opportunity (Portelli, 2013). Differentiated learning focuses mainly on the responsiveness of pedagogy in order to provide "instruction in a variety of ways to meet the needs of all learners in a class" (Module 2, p. 2). It does not in any way draw attention to poverty and

socioeconomic circumstances which often account for the students from low-income and working families dropping out of school at frequencies much higher than their affluent counterparts (CHE, 2016), and the corrosive devaluation of identities that often comes with that (Cummins, 2009). There is no reference at all to or mention in this document of the existing social arrangements in South Africa that do not permit some students to participate as peers (Fraser, 2005). It is crucial for teacher education to acknowledge that besides the individual student's disposition to learn in certain ways (which differentiated learning addresses), there are other more complex systemic issues like economic obstacles that can inhibit successful learning.

7.4 Discourses

7.4.1 Discourses of equity and social justice

The documents that were studied made few direct references to issues of equity and social justice. There was evident sensitivity to inequity and inequality in all the references to inclusion in South Africa which as always, cannot be distanced from the past historical experience of South Africans and the reality that injustice is still embedded even in present social arrangements including schooling arrangements (Soudien, 2006). The emphasis in the module "Teacher Education Module 1" which was the main document from the university's education department was clearly on the provision of different forms of support for all learners especially those who were previously disadvantaged before the establishment of the democratic dispensation.

The *Education White Paper 6* (South Africa. DoE, 2001) gives a much more comprehensive description of the inclusive goals which the education system must embrace. The *Education White Paper 6* sets out a vision for a non-racial and non-sexist system of higher education that would promote equity of access and fair chances of success to all learners, while eradicating all forms of unfair discrimination and advancing redress for past inequalities (South Africa. DoE, 2001) . There was recognition that South Africa's economic and social structures, with their attendant class inequalities, significantly constrained equality, equity, good quality education, and social justice for all (Badat & Sayed, 2014). Just like the *Higher Education Act (No. 101 of 1997*) there is a clear emphasis on the new democratic state to redress past discrimination and in order to create representation and equal access and appreciation of diversity. The major goal of the *Education*

White Paper 6 was to direct the state to redress educational inequalities among those sections of our people who have suffered particular disadvantages by dismantling the old apartheid order and creating a new system (Badat & Sayed, 2014). This position clearly resonates with Fraser's theory of parity of participation (Fraser, 2009).

The new dispensation was expected to eliminate all discrimination and create new social arrangements that would permit all to participate as peers in higher education. Addressing discrimination against certain groups understandably remains an equity standard underscoring the importance in the post-apartheid period of entitling all citizens to participate fully in education. The view of inclusion envisaged in this document is that justice could only be achieved through the redistribution of quality opportunities to learn and participate in educational programmes. The process of redress involves dismantling institutionalised obstacles that prevent some people from participating on a par with others as full partners in social interaction (Fraser, 2008). By institutionalised obstacles, Fraser is referring to economic structures that deny access to resources that they need in order to interact with others as peers.

Specific to the South African context, this means that a student's chances of entering higher education would not be predetermined by their race, socioeconomic status, language or geographical location (Shay, 2016). The principle of equity affirmed in this document would require fair opportunities particularly for those previously marginalised, both to enter higher education programmes and to succeed in them, which represents an expectation of both equity of access and equity of outcome (Fraser, 2009). Widening access without providing an environment that maximises the chances for success, erases much of the progress made through broadened participation. As the *Education White Paper 6* further explains, the equity process required on the one hand was a critical identification of the existing inequalities which was the product of structural policies and practices of apartheid that were based on all forms of discrimination and disadvantage, and on the other hand a programme of transformation with a view to redress this situation.

On the interview data, three teacher educators were asked to provide a definition of inclusion. In most of this data, the discourse fragments indicated a consistent reference to equity and fairness as aspects of inclusion. One teacher educator felt that equity had often been lumped together with

shortage of resources, as if it were not possible to treat all students with fairness even in a context of unevenly spread resources. Equity, in terms of inclusion requires that students are treated fairly and respectfully notwithstanding difficult circumstances and deprivation. She noted:

> *Not, I'm going to give you all the resources you think you need, the perfect classroom, I'll give you even the perfect group of children. It could be five to ten children. That will still not amount to equal educational equity if at the end of the day you are not a teacher who cares enough about the children around her to make the effort to understand each and every one of those children, and to adjust your pedagogy according to the needs of those children.*

This educator also brought up the issue of teachers who cared about the children around them as an aspect of equity and inclusion. According to Tronto (1993), the first moral aspect of caring is attentiveness and it includes recognising the existence of need and inequality in society and then taking responsibility to address the identified need. While participants used different definitions, most emphasised the importance of recognising different learner needs and contexts and acknowledging the uniqueness of each learner and their life experiences. The teacher educators realised that the students came from different social contexts and therefore did not start from the same place. The picture that emerged was that inclusive teacher educators cared about the students, so they paid attention and therefore they were able to understand "*each and every one of those children*" and "*adjust pedagogy according to the needs of those children*".

Student needs take different forms. Some students need to be included and to be recognised. Others need safety and trust. The teacher educators showed recognition of the different vulnerabilities of students and the different contexts (Tronto, 1993). In terms of equity, teacher educators realised the importance of recognising that students are differently positioned socially and economically. Attention should also be paid to the students' different needs and how to respond to them, always recognising the realities of unequal power and privilege in existing social arrangements. There is no assumption that the world comprises autonomous individuals who are self-sufficient and equally placed (Zembylas & Bozalek, 2011).

Most participants noted that the educational disadvantage experienced by some sections of the community, in part arose from inadequacies and limitations of the educational system. One teacher educator said:

> *I believe that schooling contributes to creating an unjust society; even the way we train teachers reproduces inequity, so in all my teaching and interaction with teacher candidates, I try to address a broad range of educational inequities and inequalities.*

The teacher educators recognised the problems of inequity in the system and some of them also accepted the responsibility to be part of the process to restore equity and justice. The educators however acknowledged that the process of overcoming injustice and creating arrangements that would allow all students to participate as peers was a complex one (Fraser, 2009), because it involved uprooting historical cultural traditions and practices that have denied equal opportunity to many groups for a long time. In the context of South Africa, with its colonial history of formalised race-based oppression, there is a greater need for higher education to actively cultivate inclusive institutions (Badat & Sayed, 2014).

Looking at the collected data in terms of perceptions and understandings of inclusion, most respondents seemed to resonate with Fraser's notion of parity of participation for all students. As most of the respondents' definitions of inclusion showed, genuine inclusion in education can only be achieved when conditions are created that allow all children to participate and to feel that they belong. As one South African educator said:

> *Inclusion then should look at barriers. All the barriers that prevent some of our students from succeeding should be removed. The concept of inclusion entails that anyone with disadvantage has to be included in any programme, in any activity that is available in the society, or in the community. One has to be brought aboard to participate.*

Teacher candidates were asked the question: How is inclusion understood and experienced by teacher candidates in higher education spaces? Most teacher candidates shared similar views in their definition of inclusion. One teacher candidate said this of inclusion, "*It should be an environment where everyone is taken into consideration. Every child has a right to the same opportunities*". Another teacher candidate also said, "*In terms of inclusion, every child must have a chance to say something, and also in terms of, financially, you must try to understand the socio-economic background of each child*".

In their different ways, both teacher educators and teacher candidates seemed to make full participation of all the normative guideline and starting point for inclusion. Teachers should create equal opportunities for all their students to learn and to succeed by removing the obstacles that

stand in the way (Fraser, 2009). As most of the respondents indicated, there are many obstacles that stand in the way of inclusion and social justice and again most respondents defined the structural mechanisms that impede inclusion in terms of socioeconomic and cultural dimensions as articulated by Fraser. The current inequalities of representation and outcomes in higher education are the result of multiple social, educational and economic factors and are not due to different overall levels of ability or potential (Gale & Tranter, 2011).

7.4.2 A deficit discourse

Another dominant discourse to emerge from the interviews was the deficit discourse which participants viewed as a major obstacle to progress towards inclusion. Participants raised the issue of teachers who tend to underestimate the capabilities of some of the learners which often results in these students failing to engage with learning to the same extent as their privileged peers. Teacher candidates were responding to the question: How is inclusion understood and experienced by teacher candidates in higher education spaces? This concern over the deficit mentality on the part of teachers mostly emerged from teacher candidates who felt that in their experience, there was rampant differential treatment of learners which often took the form of lower expectations across whole schools for students located in lower socioeconomic backgrounds. In their definitions of inclusion, participants felt that one major obstacle to inclusion was the lower opinion in which most students were held by their teachers. Teacher candidates felt that if inclusion was to succeed, teachers should move away from a deficit orientation, a mentality which assumes that lack of achievement by some learners was entirely the problem of the learners themselves. One teacher candidate had this to say:

> *I think not holding certain perceptions or opinions about a child when teaching. If this boy has been struggling with maths all the time don't just say, okay, no, you don't have to do this, and I carry on teaching the other class. Still find a way, it's like don't give up on a child. I remember one time I tried to assist a struggling student and my mentor was like, no, don't bother giving it to him, he's not even going to do it. So, then that's no inclusivity there at all. So still work with their differences like in saying work with it, making sure that they at least … that they get somewhere. Not maybe where you wanted them to get or where they are able to get but get them somewhere else. Don't give up on children or their abilities.*

The deficit mentality takes different forms in different educational spaces and is certainly not peculiar to South Africa. The most common traditional explanations for school failure are located in deficit discourses of schooling (Garcia & Guerra, 2004). Normally, deficit discourses place educational failure in individual and family shortcomings, rather than in institutional or structural practices and power relations (Borg & Mayo, 2006). Instead of identifying, intellectual, cultural, and linguistic differences among learners as alternative and legitimate ways of being in the world, differences are identified as disabilities and deficits that represent pathologies in need of cure (Stille & Cummins, 2013). This approach does not only absolve the education system of responsibility for student failure but also ignores extensive research that has demonstrated that students' academic success is directly correlated to social identity-based expectations, and that these effects are cumulative when students embody multiple marginalised identities (Aronson & Inzlicht, 2004).

This deficit culture can be pervasive in a system and in other contexts it has contributed significantly to the patterns of success of different groups in society since teacher expectations have a great impact on student achievement (Villegas & Lucas, 2007; Cooper, 2009). Villegas argues that in the US, teachers' biased beliefs about students of colour have resulted in negative or low expectations which are subsequently manifested through the placement of most of these students in instructional groups designated as low achieving or in special education (Villegas & Lucas, 2007). Kozleski and Artiles (2014) also reported that one contributing factor to the over-identification of minority students for special education was the deficit thinking of school personnel and many schools in the US continue to identify African-American students as in need of interventions which in turn also reinforces teachers' deficit views of their students (Ahram, Fergus, & Noguera, 2011).

In Canada for example, Portelli argues that deficit discourses have been used to maintain white middle-class privilege by obscuring the fact that it is the values and beliefs of this class which construct the standard against which risk is measured (OISE, 2014). For these reasons, the concerns of the teacher candidates could be real. As elsewhere, it becomes really important for educational institutions to work to cultivate a culture of high expectations for all students. For inclusion to be meaningful, schools should provide diverse and challenging learning environments

that support student development and hold all students to high expectations, empowering students of all social identities (Cooper, 2009).

Teacher candidates also drew attention to the shared low opinions of the so-called previously disadvantaged schools and their students in the South African context:

> *So, we get the private schools, the public schools, and then, I hate it, but they say the township schools, or the previously disadvantaged schools. We know that they maybe do not have as much resources as another school but now we get these things like, we were told that if you go to this type of school you must make sure your handbag is not on the floor, children might steal it. So, stuff like that.*

Teacher candidates were seriously concerned about attitudes which they deemed to be foregrounding low expectations for particular groups and the schools that they go to. In spite of the significant change and evidence of transformation in South African education, teacher candidates felt that there remain major disparities in respect of the way certain groups are perceived and treated, especially those previously marginalised groups.

7.4.3 Discourse of diversity

Discourse fragments pertaining to diversity were evident both in the documents studied and in the individual and focus group interviews. For the South African university, the module "Inclusive Education and Barriers to Learning" emphasised how teachers should engage in restructuring the culture, policies and practices in the school to ensure that the schools can respond to the diversity of learners in their area. This is supported by the *Education White Paper 6* (South Africa. DoE, 2001) which also draws attention to accommodating the "diversity of learning needs" and meeting the full range of learning needs of the learners by establishing a variety of support systems, with teachers evolving new approaches that benefit all the learners. As indicated earlier, this is not surprising in a country like South Africa where inequality has always tended to coalesce along the lines of race and class (Soudien, 2008; Cooper, 2015). Diversity therefore emerges as a significant aspect of the inclusion discourse. The *Education White Paper 6* emphasises the importance of purposefully creating and institutionalising cultures that embrace difference and diversity and to see the challenges of diversity not as problems, but as powerful facets for institutional growth (Badat & Sayed, 2014).

Ordinarily, dimensions of diversity include, but are not limited to, ancestry, culture, ethnicity, gender, gender identity, gender expression, language, physical and intellectual ability, race, religion, sex, sexual orientation, and socioeconomic status (Stille & Cummins, 2013). From what the participants said in their narratives, the concept of diversity seemed to embrace many things in the South African context. Some participants talked of diversity in terms of today's institutions representing different people, different religions and cultures and different perspectives. In South Africa this would refer to how universities strive to increase the numbers of graduates from diverse backgrounds and also how many universities have taken up the government's challenge and embarked on extending existing programmes or establishing new programmes in order to encourage and enable more and different kinds of students to access and participate in higher education (Aronson & Inzlicht, 2004). Either way, most of the teacher educators' definitions included the aspect of diversity as an important aspect of the inclusion paradigm. From their definitions, just as the definitions in the 'Differentiated Learning Module' (PGCE (FP), 2017), diversity implies creating classrooms and lessons that allow multiple points of entry into the lesson, responding to individual differences and individual needs of each student and providing conditions and interventions needed in order to help students succeed.

One of the teacher educators defined diversity, which in her view was a key aspect of inclusion:

> *I think for me inclusion is really about understanding the individuals in your classroom. As a teacher you've got to actually get to grips with who is each and every one of these little people that I'm now teaching, and how do I help them to feel that this classroom is their home. And if we are going to be genuinely inclusive, we've got to recognise that every child in our classroom is an individual, we've got to provide the teachers with the means to recognise that individuality and diversity.*

The emphasis in this definition is on learner differences and individuality and the recognition that learning can occur differently for different learners, hence the need for differentiation. The educator went further to say the following:

> *For me, inclusion is an overarching umbrella, and underneath it comes all of these factors like cultural alienation, inequity, a physical or developmental lag … class differences, language differences, all of these things that potentially make a child feel excluded or alienated … then we need a teacher who is inclusive. … A teacher who cares enough*

> *about the children around her to make the effort to understand each and every one of those children and adjust her pedagogy according to the needs of these children. The inclusive teacher is somebody who is a reflective teacher and then on the basis of that reflection, they tweak their pedagogies and their tasks.*

At this point the teacher educator moved a little beyond learner disposition to talk about equity and other variables like class difference and language which could cause feelings of alienation and isolation in some students, but clearly the emphasis remained on the obligation of the teacher to "*adjust her pedagogy according to the needs of these children*" and "*to tweak their pedagogies and their tasks*".

Another teacher educator had this to say:

> *Inclusion does not mean one size fits all. It means we will accept you, but we will put in the supportive structures where possible. So that's where I see it. I really grapple with people saying we must move into the social-ecological model and do away with the deficit model. Personally, I am not a hundred percent happy with that. Not at all. I would like to see a balance. .... In a nutshell, inclusion is to provide the best measures to support the child regardless of what that child's problem is. Whether it comes from a poverty side, or whether it comes from a learning barrier side, that's what the teacher must be able to do ... I try to bring in things like differentiation. Which means you need to know your children very well in order to apply the strategy.*

The main thread running through both definitions is that one key aspect of inclusion is that teachers should guard against the tendency to homogenise students' needs and learning styles. It is common practice, that sometimes teachers homogenise students by using standardised curricula and scripted lesson plans which assume a one size fits all approach and allows little room for variation in relation to the diverse interests and needs of students (Janks, 2014). As I acknowledged earlier on in the critique of the documents, teachers should instead recognise that every student is unique and, to a degree, deserves and requires special attention and adaptation of the learning experience to fit those unique needs, interests and abilities. This "pedagogical differentiation" (Masters, 2010) does also entail a recognition of the different knowledges that various students bring to the classroom, their differing skills, and their diverse interests and circumstances, and responding in ways that value these differences and use them to engage students in the work of the classroom.

While these views and these documents speak to some key aspects of inclusion, they also represent the danger of conflating differentiated instruction with inclusion. I would like to argue that the

view of inclusion which looks at inclusive education at the classroom level only, without paying attention to the systemic dimensions of this complex phenomenon is clearly inadequate (Kozleski & Artiles, 2014). There is a suggestion in such thinking that high quality teaching can provide equal opportunity for learning to all students, regardless of their background or other characteristics. Such a perspective of inclusion is narrow because it focuses mainly on pedagogical responsiveness and academic aptitude, implying that a systematically planned curriculum and instruction is sufficient to meet all the needs of academically diverse learners (Valiandes et al., 2018). As is evident in both definitions of participants, little attention is given to issues of institutional culture and curricula, and the absence of support mechanisms to help students overcome social and structural obstacles. As Gale and Tranter (2011) argue, it is possible that some teachers tend to ignore the extent of structural inequality in the society and the contribution of history and culture (especially in South Africa) to inequity and injustice. Such a construction of students and their learning as de-contextualised connects to the "discourse of the de-contextualised learner" (Boughey & McKenna, 2016, p. 1).

In the discourse of the de-contextualised learner, there is an attempt to frame education as asocial, acultural and apolitical. Success in education is presumed to depend on factors inherent in the individual such as psychological, social and personal characteristics. As the teacher educators seem to suggest above, inclusivity would be achieved if only teachers could adequately differentiate their modes of instruction. Such a stand would be glaringly inadequate in any context, let alone in South Africa. Engelbrecht (2013) showed how the nation's history of race relations and its concomitant effects on school relations can interfere with the enactment of the inclusion policy. Engelbrecht also drew attention to the effects of poor-quality schooling for most disadvantaged learners and the deleterious impact of an impoverished upbringing. All these issues bring to the fore issues of maldistribution which continue to make parity of participation impossible (Fraser, 2009) and the need for more qualitative equity concerns about the existing curricula, pedagogy and relations of power and governance within the education system (Gale & Tranter, 2011).

Some educators and teacher candidates viewed the inclusion problem from the perspective of teacher educators being ill-prepared – both conceptually and pedagogically – to deal with diverse students since in their own educational experiences, they were rarely exposed to non-Western

histories and culture. As a result of this background, the teacher educators themselves were inadequately positioned to provide a diverse curriculum. Some teacher candidates therefore expressed grave concerns about lack of diversity in the curriculum which they felt did not adequately represent the diversity in South Africa:

> *I think the curriculum also needs to be inclusive. You can't be teaching things that are only aimed at a certain group of people. So yes, we're celebrating the diversity in the classroom but then that diversity must also be in what you teach and how you teach and trying to understand the socioeconomic background of each child. Some students may have grown up in like the suburbs, maybe went to private schools. And then me; I may have grown up in the location, or rural areas, and then just been put into now the formerly advantaged schools. And then, obviously, just because we're right now in the same school, doesn't necessarily mean we're in the same socioeconomic background.*

This view emphasises students' individual experiences as a form of diversity and the need for teachers of these students to always take into account prior student experiences in order to make learning encounters more relevant to them (Lingard, Martino, Rezai-Rashti, & Sellar, 2016). Although all these students were South Africans who had grown up in the same country, they had very different personal and educational experiences determined for the best part by their economic backgrounds and race, among other multiple factors (Engelbrecht, 2006). It is therefore paramount that curricula acknowledge the legitimacy of the cultural heritages of different ethnic groups in South Africa and how this affects students' dispositions, attitudes, and approaches to learning. This is uniquely important in South Africa, where the majority do not necessarily belong to the mainstream culture both culturally and linguistically. Focusing on the South African situation in particular, one teacher educator emphasised the need to pay attention to issues of class differences, race and language differences, all of which are issues that can potentially make a student feel excluded or alienated, all the way up in the education system.

This perspective connects well with Bernstein's theory of 'elaborated' and 'restricted' codes (Jones, 2013). Explaining the correlation between low achievement and social class, Bernstein proposed that one possible explanation for socially stratified educational attainment lies in the differences in spoken language between lower- and middle-class families. Middle class speech habits enhance learning because the student acquires the language of educational processes (elaborated code) more naturally through speaking with their parents at home. This language is

more explicit and universal and is more amenable to specific types of information and knowledge as that used in conventional education (Ginsborg, 2006).

On the other hand, lower class children tend to use a 'restricted code', which affects how well they do at school because the language they speak gives them less experience and exposure to the language of relevant information and knowledge used at school. This 'restricted code' may serve them well in their daily dealings and limited contexts but falls short especially in educational contexts which tend to require more 'context independent' and 'universal' applications of language (Jones, 2013). The advantage which the middle-class child enjoys is that there is semantic continuity between home and school, while the lower-class child actually experiences a semantic discontinuity. While this view has been dismissed by other researchers as just another deficit theory (Edwards, 2010), this awareness could be a useful response to diversity and the creation of inclusive classrooms.

Similar sentiments were expressed prominently by several teacher candidates who suggested that any talk of inclusion in South Africa should acknowledge the past and then try to rise beyond those past injustices to include everyone. The indication, as one teacher candidate put it, was that there has not been enough transformation to get past entrenched biases to recognise diversity in its different forms:

> *And also, racially, we need to be inclusive in that perspective, because obviously different things like race to me comes with culture and principles and morals and values. So, we need to try to like accommodate all those things as well because people have different opinions, they have different knowledge, which generally gets formulated by your community, your background, your family.*

All these concerns are very significant in South Africa if inclusion is to be achieved. As Badat and Sayed (2014) argue, the specific histories of most South African institutions have produced a culture that has limited respect for and appreciation of diversity and difference and as a result, blacks, females, working-class, and rural poor students will always experience them as discomforting, alienating, exclusionary, and disempowering (Badat & Sayed, 2014).

Different participants also raised the discourse of diverse languages as an aspect of inclusion. In my view, this is probably one of South Africa's most complex challenges to inclusion. Both teacher

educators and teacher candidates spoke at length to the issue of the languages of teaching and learning which has long been a volatile issue in South African education (CHE, 2016). The South African Constitution (RSA, 1996b) recognises 11 official languages and gives all South Africans the right to receive education in the official language or languages of their choice in public educational institutions, where such education is reasonably practicable. However, the reality on the ground is different, mainly because there has not been much progress in developing local languages for academic use (Mgqwashu, 2014). Mgqwashu points out that there has not been effort on the part of South African institutions of learning to improve the teaching of, and in, indigenous languages as subjects of study. As a result, their use is very limited, so they have not been able to participate effectively in South Africa and in the world (Mgqwashu, 2014). Most teacher candidates and teacher educators seemed to be in agreement with this position as they also thought there was not enough recognition of linguistic diversity in South Africa. Participants noted that there was a strong bias towards use of the English language at the expense of other languages:

> *And I think also language is a very important factor when … especially here in South Africa because, for example, I'm Xhosa, which is part of the 11 languages, and as a student teacher here at first, I felt like I was not included as such because everything is done in English. I remember in our first week of lectures we had to choose subjects where we were going to teach methods to kids at school, and I wanted to do Xhosa home language and I was told, no, we can't offer Xhosa home language because everyone is doing English. And I was like, no, but I want to go teach in my area, I want to teach my people, so I want to do Xhosa.*

There are large numbers of children who are not part of the racial and language mainstream in South Africa and this seemed to be an issue of great concern to teacher candidates. Language is a powerful tool in teaching and learning and becomes a serious barrier to inclusion when some learners are not able to use their home language to engage with the curriculum. Generally accepted pedagogical notions of teaching and learning like teaching the whole child and connecting curriculum to students' background knowledge fall away completely when students have to engage with curriculum content in languages other than their own (Rodriguez, 2013). In South Africa in particular, students who are studying in a language that is not the one they were raised with may find that their voices are silenced and the university, with its elevated language requirements, may seem a daunting place (CHE, 2016).

7.4.4 Discourses of misrecognition

Different understandings of this aspect of the discourse of inclusion emerged in the interviews, including recognition of the different languages of teaching and learning, recognition of previously marginalised cultures and knowledges, the need for a transformed curriculum and pedagogy that value and respect and build upon the knowledge and cultural backgrounds of diverse students, (Stille & Cummins, 2013; O'Connor, 2014). Particularly important is the fact that most teacher candidates addressed the question: How do curriculum processes such as the organisation of teaching and pedagogic practices for these purposes address issues of inclusion and diversity?

There is a need for a critical analysis of the different ways in which curricula mis-recognises particular forms of cultural capital and values (Stille & Cummins, 2013). This view seemed to resonate more with teacher candidates than teacher educators. In their different ways, teacher candidates felt that higher education policies did not adequately recognise the interests of the least advantaged. In spite of the ongoing transformation processes post 1994, most candidates felt not enough had been done to develop a deeper understanding of the knowledges, values and understandings of those who were previously under-represented and excluded from higher education, especially people from lower socioeconomic backgrounds (Engelbrecht, 2006). One teacher candidate stated:

> *We can't deny that, and especially here in South Africa, given our apartheid history that set up communities that are genuinely impoverished and had their languages and cultures systemically downgraded and despised. So, I think we need to recognise that as we move forward, certain groups need more resources and special attention given to them because of the erosion of their cultural identities. And that we're critically self-reflecting on our own pedagogy so that we are including all students and making them feel included.*

There was need for the curriculum to be interrogated as a political text in order to uncover what is subtly signalled as the norm, in assumptions about whose knowledge is of most worth (Pinar, 2004). Talking about changing curriculum for inclusion in South Africa in particular, one educator echoed the view that not enough has been done yet to include other groups who had been previously excluded:

> *In South Africa, there is little doubt that our education system is overwhelmingly dominated by values of one group. And I do not want to underestimate the value of*

> *changing syllabus and texts, and names. But I think simply making such 'surface reallocations' of recognition will not achieve what decoloniality seeks to achieve as long as we do not evolve change strategies that address the real issues.*

The view that the curriculum in higher education in postcolonial South Africa is still to a large extent confronted by the legacy of colonial education, which remains in place decades after political decolonisation (Grant et al., 2018; Hendricks, 2018). Badat and Sayed have also called for the democratisation of knowledge to induct previously excluded social groups, such as blacks and women, into the production and dissemination of knowledge which as a consequence of apartheid, has been predominantly the preserve of white men (2014). There is no doubt that the enduring impact of colonial history and apartheid politics still have a bearing on educational practice in South Africa and the demand for inclusion and equity for the majority black population is evident in every conversation (Subreenduth, 2013). Subreenduth (2013) also explores how educational initiatives largely perceived as transformative have been undertaken by the South African government in an attempt to empower the oppressed groups.

The results, however, mostly show how individual choices continue to negate inclusion. Most black students will most likely experience a cultural system and curriculum that devalues and negates their home languages and cultures, histories and identities, ultimately positioning them as culturally deficient (Luckett & Mzobe, 2016). The battle for recognition includes the efforts of teachers and students to transform curriculum and pedagogy in ways that afford positive recognition to all students (Bingham, 2006), and teachers embracing the notion that they can contribute to the dignity of their students of different identity positions by recognising them through embracing their literature, language art, history and food (Waitoller & Kozleski, 2013). Most participants described personal experiences where they felt that cultural differences needed attention. Inclusive practice should go beyond being reflected in the curriculum to address issues of pedagogy, how the teachers taught. One teacher candidate said:

> *How you teach I mean your methods, your approaches, how you interact with your pupils, the words you use. So, like we always say, don't use examples of like snow when you know the kids in your class have never seen snow, they haven't experienced snow. Use examples of things they can identify in their own environment.*

One thing that emerged from this is that the recognition discourse is framed in Fraser's (1997, 2009) dimension of cultural misrecognition. In Fraser's theory, recognition is presented as an

overarching moral category which seeks to address injustice in the cultural order of society including the social patterns of interpretation, along with cultural domination, non-recognition and disrespect by pushing for symbolic change (Fraser & Honneth, 2003).These social constructions in practice result in degrading cultural representations which undermine the ability of certain groups to participate equally. This is probably why most of the participants seemed to agree that existing curricula should be transformed in fundamental ways to ensure that the cultures and perspectives of marginalised groups are incorporated in the education system. As one teacher candidate said:

> *I think what they are saying is like there is such a lot of English and like Western concepts and I suppose like white … like the educational system is very Western in South Africa, which doesn't make sense because the majority of the country isn't English speaking and white, or whatever. I think the education system largely caters to that, especially in the sense of like the curriculum, and whatever, it just like shows the dominance of that culture, and how like we are trying to include everybody it's like.*

This view resonates well with Tronto's political ethic of care (1993). In this context, recognition is a matter of discourse, so it is granted differently from economic justice that is adjudicated by the allocation of goods. Instead, recognitive justice is about the discursive ways that people are received rather than the economic goods that people are given. In the broader context of educational institutions therefore, it is expressed through recognition that there are marginalised others among us and that there is examination of the power relations involved and understanding of the caring needs others might have since recognising a need considers the uniqueness of each person's position (Tronto, 1993; Zembylas & Bozalek, 2011).

In the context of the South African institution for instance, the teacher candidates drew attention to the education system within South Africa which has remained Eurocentric and insensitive to indigenous ways of being (Higgs, 2016). This partly explains the growing discourse of decolonising curricula in South Africa (Hendricks, 2018), which in higher education in South Africa means to give indigenous African knowledge systems their rightful place as equally valid ways of knowing among the array of knowledge systems in the world (Higgs, 2016). These calls have been made in the full awareness that South African universities, despite the restructuring and changing demographics, have remained European in their cultural and philosophical orientation and Eurocentric knowledge is positioned as inherently superior to indigenous knowledge (Grant

et al, 2008; Hendricks 2018); this of course, could also be partly because it is the only knowledge that has been properly codified.

Another teacher candidate raised two major issues. He talked about how his language, Xhosa, was always excluded in the university because everything was done in English. But he also then raised another issue about "*Western concepts*" and that "*the education system caters to that, especially in the sense of like curriculum, and whatever*". These aspects relate to what Fraser calls 'disparities' in the curriculum (Fraser, 2009), which refers to what it is that the participants want to be displaced in the curriculum. As the teacher candidates indicated, it is the content and the pedagogy that represents the epistemological pattern of undesirable representation (Fraser, 2009). In South Africa, as indeed elsewhere in post-colonial education systems, there was little doubt that the education system was usually overwhelmingly dominated by Anglo-Saxon worldviews and values which have been allowed to pass as universal and true and is entrenched with the attendant arrangements of domination (Barreto, 2014). It is legitimate that higher education should seek to transform curriculum and pedagogy into something that casts the identity positions of those who were previously marginalised in more acceptable ways.

In Nancy Fraser's three-dimensional theory of justice, the quest for change in this context falls within the reparative mechanism of recognition of identity (Fraser, 2009). Higher education should continue to challenge assumptions about whose knowledge is most worthwhile, embracing African worldviews and root national educational paradigms in an indigenous sociocultural and epistemological framework (Higgs, 2016).

The discourse of language as recognition is also a contentious subject in South Africa and most of the teacher candidates expressed profound concern at the status quo in which all their indigenous languages occupy a devalued status and emerge as inferior to English and cannot be used to access education (Mgqwashu, 2009; Kamwendo, 2011) This is in spite of the fact that the Language Policy for Higher Education (2002) has redefined the status of South African languages and entrenched language rights and choice with the goal of creating opportunities for promoting language diversity and multilingualism in education and society.

One of the major reasons was that the indigenous South Africans themselves have accepted the status of English as the language of power and as economically more important than other languages, which is the reason why it dominates in most government institutions and the private sector (Kamwendo, 2011). In fact, there are some universities in South Africa where indigenous languages have been used as a medium of instruction for some programmes, but almost ironically, some African students and parents have expressed disfavour at this practice (Nkosi, 2014).This marginalisation of indigenous languages has occurred in South Africa in spite of evidence that teaching the whole child and connecting curriculum to students' background knowledge ceases to be an advantage when learners have to engage with curriculum content in languages other than their own (Rodriguez, 2013). Nevertheless, in this study, participants felt language presented a huge barrier to the process of inclusion. One teacher candidate had this to say:

> *And I think also language is a very important factor when … especially here in South Africa because, for example, I'm Xhosa, which is part of the 11 languages, and as a student teacher here at first, I felt like I was not included as such because everything is done in English … which doesn't make sense because the majority of the country isn't English speaking and white, or whatever.*

Another teacher educator said the following about linguistic plurality in South Africa:

> *One thing that I found is that 90% of the children in South Africa are taught in classrooms where they are not taught through their mother tongue. So that means that those learners have to learn through a language that they first have to learn or strengthen and then to write, read and learn in those languages. In the end, when we are confronted by their inability to function, we are not always sure is it because of the language, is it because of behavioural problems, or is because of cognitive or otherwise learning challenges?*

The educator went on to describe how most students are confronted with a medium of instruction which they have not mastered, and which is not the language spoken at home. The teacher educator was clearly concerned about the deleterious effects of not learning in one's mother tongue in the early years of schooling (Cummins & Swain, 2014). If this language problem is considered in the social domain together with other social structures and complex intersectionalities like race, class and gender, then students' experiences become really problematic in terms of educators attempting to enable epistemological access through language (Williams & Morrow, 2009; Boughey & McKenna, 2016).

Students who are marginalised because they come from low-income communities, who mostly speak English as a second or third language, now experience multiple marginalisations at the individual and institutional level. Such an "ideological model of literacy" challenges the idea that language use is neutral (Luckett & Luckett, 2009; Mgqwashu, 2009). In such socially constructed literacy practices, literacy is a social practice, not simply a technical and neutral skill (Street, 2003). The 'ideological model' recognises that learning English is now understood to involve values and risks of identity change and other complicated social concerns (Qu, 2011). This view is a more culturally sensitive conception of literacy practices because it recognises that literacy practices vary from one context to another.

On the other hand, is the autonomous approach, which is a narrower transmissional approach, which views literacy as a set of de-contextualised and discreet cognitive skills (Pahl & Rowsell, 2012). This approach disguises the cultural and ideological assumptions that underpin literacy and then present literacy practices as neutral and universal. This view of language and literacy practices is part of what often leads to the deficit construction of parents and children from poor and working-class communities, whereas the ideological model would certainly help to foster positive cultural identities which then supports more equitable outcomes for disadvantaged groups. This is especially true of those who were previously disadvantaged before the arrival of the democratic dispensation in South Africa.

From the narratives of different participants, this discourse of recognition revealed the presence of serious obstacles to inclusion mainly due to deeply embedded social and historical disparities and practices that make participation parity almost impossible in spite of the transformation that has taken place in South Africa. Beyond the demographic transformation of the student body in relation to race and the enhanced access, stands an almost unshakable global epistemic order that has always favoured colonial educational paradigms (Higgs, 2016). The transformation process shows profound complexity. What is required is a major equity policy shift which addresses the fundamental historical inequities.

7.4.5 Discourses of maldistribution

The discourse fragment of maldistribution mainly referred to the disparity in the distribution of resources. Inclusion for most participants was the effort to address injustice in the economic structure of society, evidenced by the marginalisation of the majority in all aspects of social and economic life. Inclusion requires a fair distribution of economic and social benefits and resources and promotion of equity (Segal & Wagaman, 2017).There was a need in South Africa to dismantle all the institutionalised economic obstacles that prevented many from participating on a par with others as full partners in social interaction. The multiple socioeconomic disadvantages experienced by many and the resultant disparities in social participation (Nieto, 2009) have a direct impact on education. These conditions directly translate to inequitable distribution of educational material resources. In South Africa for example, students from so-called townships and rural areas have an entirely different school experience from those in the affluent areas who usually have access to private schools and elite universities. Describing this as a common occurrence, one teacher educator had this to say:

> *I'm just going to give poverty as an example. A child who lives in the townships usually comes into the class hungry, there might be nothing wrong with their brain, but they're going to struggle to learn. As anybody knows when you're hungry you struggle to learn. Or they live in such dire circumstances that there's only one room in the house, so they are sleep deprived.*

Because of such discrepancies, there is a need to devise strategies to support such students to enable this kind of student to participate alongside their peers. Most black township and rural schools lag far behind due to the scarcity of basic educational resources such as television sets and CD players in addition to the absence of school and community libraries, and home environments that are not conducive to learning (Amin & Ramrathan, 2009). In most cases, the same students are likely to attend school in dilapidated classrooms which are often badly maintained and lack basic tools for learning.

When students learn in such circumstances, it is not surprising then that they develop feelings of inadequacy and inferiority. Inclusion requires changing existing classrooms and structures so that all students can be served within a relatively equal system of quality education. Economic inequality undermines an individual's capacity to participate on par with their peers and poverty

specifically inhibits and limits educational achievements and life aspirations. (Gale & Tranter, 2011). As pointed out earlier in the theory of social justice section, research has repeatedly demonstrated the links between poverty and poor schooling, including early school-leaving and future economic deprivation and ultimately social dysfunction (Keddie, 2012). According to the educator quoted below, these problems cited above are real issues in South African education and often they are also exacerbated by increasingly uncontrolled enrolment figures especially in schools in the poorer communities:

> *Unlike private schools which can engage additional staff, public schools can't do that. So how do you actually manage a classroom when you've got 40-50 learners and you're alone? Or you've got multiple age groups in one class, how do you manage that and actually make sure learning is happening?*

Similar difficulties were common in the universities too, including in teacher education. Teacher educator participants gave examples of cases where teacher candidates on practicum dropped out because they could not afford the bus fare to go to school every day. Often there is not enough time and resources to ensure that teachers are adequately prepared for their work before they are deployed. Most importantly, there is not enough resources to support teachers on practicum for a reasonable period so sometimes teachers get just a short period of field experience in their final year. As one teacher educator put it:

> *My feeling is that at the moment I think we are failing quite badly. And a big area where we fail is, we don't get to see our teachers enough practicing in the classroom when we're training them. We cannot afford that kind of training and yet it's that kind of training that our teachers are desperate for because that is the reality of our situation. ... And they realise the gaps in their knowledge, that perhaps they didn't get enough practical knowledge.*

This was corroborated by another educator who added that even when teachers get to go on teaching practice for some time, there were not enough resources to ensure that teacher supervisors actually went into the field to observe and mentor them as was required. As a result, often this element of training is not even assessed. This obviously has a long-term impact on the quality of teachers that are produced and the subsequent quality of teaching and learning in the classrooms.

7.5 Retroductive Analysis: Socio-Historical Conditions

Once again, to get more insight into the underlying mechanisms that influenced the conceptualisation of inclusion and inclusive practice, I examined the socio-historical conditions in the South African institutional context using retroductive analysis. The outcome of this retroductive analysis was the identification of some of the mechanisms that explained what caused particular events to occur by identifying the circumstances without which the phenomenon could not exist (Danermark et al., 2002). The goal is to identify the necessary contextual conditions for a particular causal mechanism to take effect and to result in the trends observed in the empirical data or beyond it. The retroductive process involved continuously moving from the empirical observations in the form of the different texts of data that I collected, to conceptualisations of transfactual conditions in order to be able to describe the other conditions that would enable a particular aspect of inclusion to exist. I had to ensure at every point that this exercise would relate as much as possible only to those conditions which would be essential and contingent on the existence of those aspects of inclusion under focus.

In South Africa, most of the narratives from participants indicated an active recognition of the need for equity and inclusion. This would be hardly surprising to many people given South Africa's history of apartheid. The legacy of apartheid was social and economic structures and relations that ensured unbounded economic prosperity and social opportunities for a small white minority while the black majority lived in poverty and deprivation. This is why any discourse of education in South Africa is foregrounded by issues of under-representation and equity deficits. During apartheid, institutionalised racism pervaded all spheres of South African life but conceivably had the most profound effect on education (Subreenduth, 2006). Most South African institutions emerged from an educational system that was fraught with inequitable structural and social conditions and cultural historical legacies of disadvantages for some groups. In particular, the apartheid education system was characterised by racism and unequal opportunity (Lotz-Sisitka & Schudel, 2007), such that one of the major education projects of post-apartheid South Africa has been the defining of a new national curriculum that responds to the history of marginalisation and discrimination of the apartheid years.

There are many who argue that this situation has not changed at all and presents an urgent need to eradicate those negative effects of colonial rule and apartheid policies on education. For others, even today, the existing curriculum at South African universities does not contribute to a much-needed fundamental transformation and social justice in such a deeply unequal society where inequality is rooted in centuries of racial oppression (Heleta, 2018). As the Department of Education (2008) noted, there was an urgent need for "reorientation away from the apartheid knowledge system, in which curriculum was used as a tool of exclusion, to a democratic curriculum that is inclusive of all human thought" (p. 89). This brings to the fore the discourses of inclusion which seek to examine ways in which ideas, beliefs and values can be transformed to fall in line with the sensibilities of the majority.

South Africa also has to deal with the issue of differential outcomes for different groups of higher education graduates. According to the CHE (2016), the throughput and completion rates of public universities remain a concern, particularly the success rates for the historically disadvantaged groups. The numbers of black and coloured students in higher education are fewer than those for white and Indian students, but black students also fail and drop out of the system at disproportionately high levels (CHE, 2016; Vorster & Quinn, 2017). This state of affairs could serve to validate observations that most of these institutions of higher education have publicly used a discourse of transformation without actually engaging in substantial structural and cultural change beyond demographic transformation (Vorster & Quinn, 2017). Grant et al. (2018) have also argued that the higher education sector has remained largely untransformed, in spite of this awareness of the strong imperative to transform all aspects of the higher education sector to eradicate the pernicious effects of apartheid and colonialism.

Many students still feel alienated from the institutions and their ways of working (Letsekha, 2013) and the curriculum at South African universities continues to be a source of alienation for the majority of students as it does not speak to their experiences and certainly does not reflect the philosophical, social realities of their communities. Most students feel they still live in an institutional culture of alienation, racism and exclusion (Mamdani, 2016). Speaking of untransformed institutional cultures, Alasow (2015) adds that while most universities now claim to be diverse, universal and accepting spaces, for many students they are still a home for those who are white and middle class. The monopoly of Western knowledge traditions in curricula has

contributed to epistemic and social exclusion experienced by students and the creation of 'a hierarchy of superior and inferior knowledge" (Gosfoguel, 2007, p. 214). Badat (2009) summarises this lack of transformation by saying:

> The troublesome stasis and continuities in conditions and institutions include limited access to students from working class and rural origins, the social, the social composition of academic staff which remains largely white, limited decolonisation, de-racialisation and de-gendering of knowledge production, and institutional cultures dominated by historical tradition. (p. 455)

Heleta (2018) also argues that the dominant and hegemonic colonial and apartheid-era knowledges, which continue to shape the ways of knowing and understanding of social, political, economic and other relations continue to construct everyday realities in the country. There is little or no recognition and appreciation of different lived experiences that other privileged students bring with them into the classroom. Curriculum, teaching and learning are still based on assimilationist models that position black students as deficient. The notion of viewing black students as inherently deficient is often driven by a deficit thinking that has continued to influence educational thought and practice in many parts of the world. Its simplest form is in how the school systems place the causes of non-achievement on the individual students and their identities and their families while absolving the system itself. In such a system, issues that affect minority groups such as limited ability, linguistic shortcomings and limited motivation to learn and disruptive behaviour are blamed on the students themselves or their family backgrounds (Cooper, 2009).

Similarly, many participants in this study noted that the massive race and class inequalities inherited from the apartheid era remain intricately woven into the contemporary reality of South Africa, as well as the effects of the long-term racial segregation and discrimination. Because of these strong perceptions that race and class privilege have literally been reified in South African universities, there has been an emergence of a radical discourse of social and epistemic inclusion articulated through movements like the #FeesMustFall protests of 2015 (Heleta, 2018). The goal of this movement, among other things, was to dismantle the Eurocentric hegemony and decolonise higher education. Students were calling for the decolonisation of higher education institutions that they continue to experience as alienating and have clearly continued to valorise Western forms of knowledge and pedagogy (Meth, 2017). As Heleta puts it, the movement aimed "to engage with the plurality of experience and perspective in each and every culture and part of the world instead

of blindly following the Western universalism and the notion that Europe and the West are the centre of the globe and the source of all global knowledge" (Heleta, 2018, p. 58).

This context makes the process of decolonisation of the curriculum a necessity in order to ensure that curriculum includes knowledge which acknowledges different sources of production and application of knowledge and also validates the experiences of the non-dominant groups (Hendricks, 2018). Yet in South Africa, the core structural conditions of apartheid over a long period continue to place severe constraints on the pace and possibilities of reducing inequalities and realising social justice. The apartheid legacy remains intractably entrenched and the nation's history of race relations inevitably interferes with the enactment of inclusion policies. This situation in many ways explains why the discourse on inclusion is the way it is. The sociohistorical conditions that constitute South Africa's reality mean that, even today, legislation and policies on inclusion have been formulated against the backdrop of the apartheid state and its social structures. This partly explains the strong emphasis on equity and social justice and human rights in South African teacher education.

CHAPTER EIGHT: KEY FINDINGS: ZIMBABWEAN UNIVERSITY

8. 1. Introduction

This chapter will examine the research findings from the Zimbabwean university. The same research questions used in the Canadian and South African cases were used to explore the case of inclusion in the Zimbabwean university. The focus was to examine how inclusion, as an aspect of social justice, was conceptualised and practised in teacher education programmes in Zimbabwe. I examined different documents and interviewed teacher educators and teacher candidates in order to understand better how inclusion was understood and practiced in the Zimbabwean context. I begin with an analysis of the documents that were made available then go on to analyse the interview data.

8.2 The Zimbabwean University Policy Context on Inclusive Education

Once again, as was the case in the previous two chapters, I begin by providing an overview of the documents made available by the university. I will then proceed to analyse the data from both the documents and the interviews. However the discourses that emerged in the case of Zimbabwe were very different to those I discussed in the previous two chapters. Most notable was the absence of most of the discourses that have emerged in the other two contexts. In this case only two discourses were evident:

1. Discourse of special education;
2. Discourse of maldistribution.

Accordingly, I will discuss the data from this institution in terms of these two orders of discourse.

Although many documents were made available to me at this university there was no official document that could be seen as offering guidelines for or a policy on inclusive education. I selected four major documents: two documents from the Ministry of Education that made some references to inclusive education and two other documents that were made available by the teacher education

department. Both of them were part of the current curriculum and were clearly focused on 'Inclusive Education'.

8.2.1 Document 1

Title: Zimbabwe Education Blueprint 2015-2022 – Curriculum Framework for Primary and Secondary Education

This policy document sets out the common aims and objectives of the Zimbabwean education system. It also sets out the specific features of different education levels and articulates the ministry's mission, which is "to provide equitable, quality, inclusive and relevant infant, junior and secondary education" (Education Blueprint, 2015, p. 1). In the section that addresses the philosophical principles that guide the curriculum, inclusivity is the first principle stated alongside equity and fairness, gender sensitivity and diversity, among others. Equity and fairness refer to "the provision of equal and fair access to information, learning and other resources to all learners regardless of religion, ethnicity, gender, ability and residence" (Education Blueprint, 2015, p. 5). Gender sensitivity refers to the equal and fair treatment of boys, girls and adults alike, taking into account their gender needs. Inclusivity refers to an "education system that takes into account and addresses the different learners' needs and abilities without disadvantaging any group or individual" (Education Blueprint, 2015, p. 5).

These are the only references to equity and/or inclusion in this rather lengthy policy document although the Ministry of Education makes extensive reference to this curriculum framework document as the principal reference document for all issues pertaining to education in Zimbabwe, as stated in the preamble. The university's education department made this document readily available, and the document is also available online. There is a clear absence of engagement with equity and inclusion in the ministry policy documents besides mentioning these words in passing. This absence can be explained using the idea of absence from Bhaskar's critical realism. According to critical realist thinking, absence is the crucial empty, physical and social space that enables processes and change (Wilkinson, 2015). Absence of any meaningful reference to equity and justice in the Zimbabwean discourse of education in a sense means the presence or existence of some positive force for change. In this view, positive transformation in a system becomes a product

of a progression from something negative (Bhaskar, 2008). The absence of a discourse of social justice becomes critically important because it is a necessary condition for remedying the absence.

8.2.2 Document 2

Title: Education Module 1

This is an 11-unit module that focuses on inclusive education at the level of early childhood. As is clearly stated, the main goal of the course is to create awareness among teacher candidates of the needs of exceptional students. The module starts by defining inclusive education as a scenario in which all children attend and are included in their local schools in age appropriate ordinary classes. After that, the 11 units are broken into smaller units dealing with different types of impairments and how children with exceptionalities can be integrated into today's schools. Some of the impairments addressed in this module include mental retardation, learning disabilities, communication disorders, behavioural disorders and physical handicaps.

8.2.3 Document 3

Title: "Inclusive Education: The way of the Future". Report by Zimbabwe at the Forty-Eighth Session of the International Conference on Education. Geneva: 25th - 28th November 2008.

This is one of the few documents published by the Ministry of Education that focuses directly on the issue of inclusive education in Zimbabwe. In its preamble and conceptual framework, the document states, "Inclusive education can be regarded as synonymous with *Education for All* (EFA)" (UNESCO, 2008, p. 17). Unlike integration that refers to physically disabled children joining the mainstream classes or "normal" children, inclusion is a much broader concept, and is viewed differently at different points in this document. At one point, inclusion is described in terms of access, i.e. it is the responsibility of government to ensure that all children and adults receive education (which is similar to *Education for All*), as this was seen as the best way to make education inclusive. Further, the government realised that in order to implement inclusive education to its logical conclusion, it must promote adult literacy, lifelong and continuing education" (UNESCO Report, p. 19). Furthermore, the ministry has also diversified the

curriculum in recent years to cater for children of various aptitudes, "[t]hus, making the education more inclusive" (UNESCO Report, p. 19). The policy also states that it is the role of government to ensure representation of women in all institutions and that all children with disabilities are fully catered for.

On page 15, the UNESCO report recommends the following as steps to implement inclusion:

- Substantial sums of money are required to purchase equipment and train manpower;
- Annual budget should be increased for infrastructure ;
- Electrification of schools should be expedited;
- Conditions of service for teachers should improve.

The document further states that the structures in the school system should reflect inclusive education. Where necessary, structures should be adapted to meet the circumstances of the student, e.g. adapted desks, classroom entrances, toilets, ramps and rails (p. 24). Teachers should understand that inclusive education is for all children irrespective of their abilities and disabilities, but it emphasises provision of education to vulnerable children in difficult circumstances such as children with disabilities, street children, the girl child, working children, and children infected or affected by HIV/AIDS. Finally, the curriculum level must also be inclusive and should not be designed only for children who do not have challenges or problems.

It is not possible to pin down the meaning of inclusion to any one position from this document but there is no doubt that inclusion is understood from a variety of perspectives. At one point inclusion is described in similar terms to *Education for All*. The UNESCO Report (p. 7) says:

> In order to ensure that all children and adults receive education, the Government of Zimbabwe expanded access to education at all levels starting from Early Childhood Development (ECD) to tertiary education. This was the best way to make education inclusive. The Government realised that in order to implement inclusive education to its logical conclusion, it must promote adult literacy, lifelong and continuing education.

Elsewhere in the document, the term refers to students who have disabilities and other difficulties; "For education to be inclusive, children with a disability should be fully catered for in the education system" (UNESCO Report, p. 5). Then there is also the perspective that views inclusion in terms

of all vulnerable groups of children including street kids and those affected by HIV/AIDS, as well as women and girls. It is also, at another point, construed in terms of broadening the curriculum in order to accommodate learners with different aptitudes. At this point the document says, "In recent years, the Ministry of Education, Sport and Culture has diversified the Curriculum so as to cater for children of various aptitudes, thus making the education system more inclusive" (UNESCO Report, p. 11). This partly confirms the earlier argument by Mafa (2012) that in Zimbabwe, there is a clear lack of understanding of inclusive education among stakeholders, and there is no single existing legal framework to support any of those notions of what is perceived as inclusive education. This lack of clarity is echoed by one of the teacher educator participants who emphatically argued that, "*there was a need for the ministry to explain what exactly they mean by inclusive education. When we just say inclusive, it's very general. So far for the ministry, it's mainly abstract, it's too broad. It's still to be unpacked*".

8.2.4 Document 4

Title: Course Outline - Inclusive Education

This course is aimed at special education teacher candidates who are going to teach in primary schools. The main objective of the course is to create awareness among student teachers of the needs of exceptional children. Exceptional children, according to this document, include the gifted, slow learners and those with learning challenges. The teachers should be able to identify, as well as facilitate early referral and early assessment, as well as placement of learners in relevant educational programmes that are offered by the Ministry of Education, Sport and Culture. This course is in line with the policy on integration of the Ministry of Education, Sport and Culture where emphasis is on educating the child within their environment whenever possible. Knowledge of different types of exceptional children should also help teachers to design appropriate learning programmes to suit their particular needs. A further reading of the document, however, shows that 'exceptional needs students' refers to special education needs.

8.3 Critique of Documents

The documents also address the key question about the understanding and practice of inclusion in higher education. Two main ideas emerged from the documents accessed in the Zimbabwean

University. Firstly, the documents do not show much clarity in terms of what meanings of inclusion are intended and they often conflate the meaning of inclusion with other clearly distinguishable terms like *Education for All* and integration of students with disabilities into the mainstream. The key issue, however, is that inclusive education mainly refers to including those learners who have special education needs.

The Education Blueprint (2015), which is the most authoritative document available on education policy in Zimbabwe, does make a few references to inclusion and equity – especially in the mission statement – but does not explain what the Ministry of Education's view of inclusion is. The second issue is that the two course outlines, which reflect the perspectives of the teacher educators who generated them, do not make a distinction between special education and inclusive education. For example document 3 (course outline), is entitled "Inclusive Education" but spells out its purpose in terms of "early identification" and "assessment" so that students can be "placed" in appropriate programmes. Similarly, document 2 (also a course outline) asserts that it "focuses on inclusive education at the early childhood development level" but an examination of its 11 units shows that it is entirely about different kinds of disability. This is of course consistent with the understandings shared by most participants in the interviews discussed later in this chapter which generally showed that in Zimbabwe, inclusion is most commonly defined in disability terms (Mafa, 2012). As in many countries, the special education paradigm has continued to prevail and has continued to shift more towards the individual pathologies models of service delivery (also known as the Child-Deficit Medical Approach), arising from the assumption that disability is a condition located within the individual that requires differentiated services by personnel with specialised skills (Lalvani & Broderick, 2015).

Finally, even though there are also limited references to the terms "equitable" and "inclusive", there is a glaring lack of clarity in terms of what the full import of the terms are, especially in the Blueprint (2015). According to the Blueprint, equity and fairness refer to "the provision of equal and fair access to information, learning and other resources to all learners regardless of religion, ethnicity, gender, ability and residence" (p. 1). In this sense, the document speaks to the same concerns highlighted earlier on, that the definitions and implementations of inclusive education vary immensely and are contested within and across educational systems (Armstrong, Armstrong,

& Spandagou, 2011). Next, I discuss the two discourses that I identified in the Zimbabwean university interviews and documents.

8.4 Discourses

8.4.1 Special education discourse

All the participants were asked the key question: What is your definition of inclusion? The first teacher educator had this definition:

> *Inclusion to me should actually mean every child should belong to mainstream education and should be taught from the same class as the so-called normal child. Whether they are disabled or not, they should actually learn together. If there are special requirements or special needs for those disabled, then they should be provided while they are learning together with their peers.*

Most definitions from both teacher educators and teacher candidates were similar to this, and even when the scope of the definition sounded broader, the participant placed additional emphasis on disability:

> *Inclusion entails that anyone with disadvantage has to be included in any programme, in any activity that is available in the society, or in the community, one has to be brought aboard to participate. Disability is at the forefront in terms of inclusion, it's because when you compare with all other formally disadvantaged groups like the girl child, the youth and so forth, persons with disabilities are really in a very bad situation in the community.*

This definition began with 'anyone with disadvantage' but in the end it focused on disability. Yet it was noted that the statement: "*to be included in any programme, in any activity that is available in the society, or in the community, one has to participate*", certainly refers to parity of participation (Fraser, 2009). The same pattern emerged from the teacher candidates in the focus group discussion who all defined inclusion in terms of disability. One teacher candidate provided this definition:

> *It is when learners or people with disabilities are encouraged or put in the mainstream classroom together with their peers or their siblings. It also entails the availability of resources which cater for their needs, for example ramps on doors or classroom entrances. Some hearing aids maybe in classes for those with hearing impairments so that they won't be excluded in their teaching and learning set up.*

Thus, for most teacher candidates, inclusion was primarily about special needs and clearly centres on the location in which education takes place, rather than the nature of instruction. Another teacher educator made significant observations about teacher education in Zimbabwe and how its emphasis was still on professional foundations and the particular disability area of specialisation:

> *Theory of education is what we mainly emphasise on. The psychology, philosophy, sociology, that's what we emphasise. Sociology, psychology, of course they also help us understand differences that is amongst our learners, our pupils, as it were. But it doesn't then specifically address the different needs that we are now talking about. Hence the need for every teacher to be trained probably as a specialist in all the challenges that our children might actually have.*

As the document study shows perhaps more clearly, there is no doubt that in the Zimbabwean university, the boundary between inclusion and special education is blurred and often inclusion is conflated with *Education for All* (UNESCO, 1990, 2000), which is mainly concerned with increasing the number of learners accessing basic education.

There have also been suggestions in Zimbabwe that the phenomenon of inclusive education has largely been overlooked in the glare of positive news about the country's gains in education, as Zimbabwe continues to be highly rated in terms of literacy levels and the availability of education for all (Kudakwashe & Richard, 2011). The conversations with teachers showed that there was little space and attention to processes of inclusion of marginalised groups because Zimbabwean discourses seemed to generally adopt the view that their society is homogenous. A possible explanation from the public narrative was that Zimbabwe has always attempted to frame injustice and marginalisation as purely a phenomenon of its historical colonial injustice, which in this perspective would have ended with the defeat of colonialism, the achievement of independence and the establishment of a democratic government. Only one participant teacher educator felt that there was perhaps a need at some stage to re-conceptualise the whole notion of inclusion which had continued to be seen as the integration of children with disabilities into mainstream schools, even by most education professionals. The participant also highlighted what he saw as the

ambiguity and confusion surrounding the concept in government policies and among government officials and educational professionals, despite the term inclusion having become part of governmental rhetoric. He had this to say:

> *There was need for the ministry to explain what exactly they mean by inclusive education. When we just say inclusive, it's very general. Do they mean bringing everyone to the school? But are they participating? Are the attitudes changed? Peer attitudes, community attitudes etc. So far for the ministry, it's mainly abstract, it's too broad. It's still to be unpacked because we cannot just bring everyone again to the same class and say we are including. That's why we are calling for and advocating for specificity when it comes to disability inclusion.*

The focus is specifically on placing disabled learners in the same classrooms with their non-disabled peers. The Zimbabwean discourse on inclusion seems to presume that marginalisation or inequity is not located in relation to the broader political and economic context in which education is conceived and executed. All disadvantages, from the perspectives of most participants, were explained purely in terms of poverty and shortages, without the slightest linkage to the profoundly political nature of marginalisation. Often, government is applauded for paying attention to people with disabilities although clearly, very minimal resources have been allocated to institutions taking care of these people (Chakuchichi, 2013).

There was also notable absence of any reference to protection of culture, knowledges and languages or histories as part of recognitive justice. From what emerged repeatedly from teacher educators and teacher candidates in Zimbabwe, the question of equity in teaching and learning within schools and the inequitable social relations that characterise education today did not arise at all. There seemed to be an assumption that schools functioned apart from the influence of sociopolitical structures, as no attention was given to historical and contextual processes of inclusion and marginalisation. This presented a striking contrast with the other two universities discussed earlier – one in Canada and another in South Africa – where generally, teacher educators and teacher candidates associated educational inequalities with cultural and sociopolitical structures and their intersection with individual and group characteristics such as gender, ethnicity, language, religion.

This Zimbabwean position, however, seemed to be consistent with the UN Convention on the Rights of Persons with Disabilities (1994) Article 24 Clause 2(b), which urged all countries to ensure that all children with disabilities could access education in the communities they lived in. Zimbabwe ratified this convention in September 2013. In this view, the spotlight is on the individual learner with distinct deficits and clearly does not go beyond access and equality, with the primary concern remaining increasing access to the general education curriculum and providing facilities to support disabled students. As one teacher educator said in response to the question: How do curriculum processes such as the organisation of teaching and pedagogic practices for these purposes address issues of inclusion?

> *Not yet. Actually the curriculum that is being used in teacher's colleges, there's very little emphasis on inclusivity. Actually they have a course which they call special needs education, as a course, which serves to show that they are not yet really happy about this inclusion aspect. Yes. In fact, I think we should have some awareness campaigns educating both the lecturers and the students on why inclusivity is very, very crucial. And how it differs from special needs education.*

In existing research on the subject of inclusion, the absence of equity and social justice discourses is not an anomaly at all. There are many countries in the world where inclusive education has continued to be viewed as synonymous with special education in which research and practice often target populations with disabilities (Wright, 2010). According to Artiles et al. (2006), inclusive education in a number of developed nations has always tended to target students that are typically identified as having disabilities and is most frequently connected with an agenda around the education of persons with disabilities and more specifically about how students with disabilities can be included in general education classrooms. In the United States for example, inclusive education has remained focused on mainstreaming students receiving special education into general education settings, despite efforts by scholars and researchers to broaden the inclusion agenda (Artiles & Kozleski, 2007; Baglieri et al., 2011). In many places in the United States for example, inclusion is viewed in terms of students with disabilities spending more than 80% of their school day in regular education settings (Liasidou, 2010). In Germany too, inclusive education has been debated for many decades and there is a growing consensus to embrace inclusive programmes, but only in the sense that virtually all students with special needs are served in special schools (Kozleski & Artiles, 2014).

The conception of inclusion as targeting students that are typically identified as having disabilities evident in Zimbabwe, is not unusual. This conception lends credence to the earlier argument that there are multiple discourses on inclusion and there are disparate meanings that permeate this discourse (Kozleski & Artiles, 2014). It also confirms the view that inclusive education has been shaped by different cultural, historical, economic, and political contexts in which it occurs and these contexts shape how inclusive education is appropriated and implemented (Waitoller & Kozleski, 2013), for example in the United States. Waitoller and Thorius (2015) argue that while United States education reform has always been characterised by a strong and explicit commitment to inclusive education, education reform has never included a full commitment to inclusive education as it is generally understood today. This understanding refers to the general perception that the initial goal of inclusive education was to transcend the integration of learners with disabilities into typical classrooms in pursuit of a highly ambitious agenda to focus on increasing the equitable distribution of rights and access to educational resources, (Kozleski & Artiles, 2014). Instead of inclusion focusing on the transformation of education systems in line with the ideals of social justice (Waitoller & Thorius, 2015), the dominant discourses in teacher education within the United States show an apparent inability or unwillingness to conceptualise disability-related issues in education as having to do with social justice or the other multiple markers of identity that characterise individuals and groups of learners (Cochran-Smith & Dudley-Marling, 2012). While all this does not explain why the discourses in Zimbabwe are different, it shows that, as already explained, inclusive education is not implemented in a vacuum and embodies the ideologies, the historical legacies and the cultural discourses of the different contexts (Mutua & Swadener, 2011; Singal, Jeffery, Jain, & Sood, 2011).

What this means for Zimbabwean education is that inclusion continues to be viewed in the traditional sense, which means it is about special education needs and disability (Lalvani, 2012), and possible sociological discourse concerned with social justice and equity remains non-existent. Yet, there is still a need to understand that the constitution of pupils' needs in school proceed from a far more complex set of relationships than those that are organic within a child. While the individualistic focus on disability and the preoccupation with provision of resources in this discourse is not unusual, an approach to transformation of education that also embraces social justice ideals may be a most worthwhile alternative.

8.4.2 Discourse of maldistribution

Under this discourse fragment, teacher candidate participants mostly responded to the key question: How is inclusion experienced by teacher candidates in higher education spaces? In Zimbabwe, as elsewhere in the low income world, any meaningful discussion of inclusion cannot avoid a discourse of poverty and inequality (Singal et al., 2011). While the participants did not necessarily describe the problem of inclusion/exclusion in social justice terms, their emphasis on the economic aspects of inclusion requires attention. The participants' concerns about the depth of poverty in their circumstances were typically grounded in a distributive paradigm (Fraser, 2009). In addition, as in other developing nations like India and Kenya, the legacies of colonialism, as reflected in marginalisation processes linked to gender, caste, poverty, and geographical location, intersect with disability status in complex ways, which make it virtually impossible to create inclusive education systems (Mutua & Swadener, 2011; Singal & Jeffery, 2011).

As most participants from the Zimbabwean university attested, the stigma of poverty continues to be the single most significant barrier to inclusion. Both teacher educators and teacher candidates agreed that the universities and the Department of Education have failed to equip the teaching staff and schools with the capabilities to support students with different needs. Much of the discussion centred on disabled students only and all participants gave harrowing narratives of poverty and deprivation that make inclusion virtually impossible. Teachers described how because of the shortage of resources, disabled students have become a burden to individual teachers and schools in many parts of Zimbabwe:

> *I am saying we have children, many children or learners who are hard of hearing, not deaf. But we are making them deaf because there are no resources. If you give those kids hearing aids they can participate in ordinary classrooms without any problems. But they are deaf, why? Because we don't have resources. We don't have wheelchairs. The issue of resources is debilitating greatly against inclusion.*

While the individual teacher might be committed to their work and want to give support to their students, often they were not well equipped to do this. Meanwhile, the issue of resource scarcity exists at every level in Zimbabwe, whether it be resources to train enough teachers or resources to support the needs of students already in school, and resources for physical infrastructure (Chakuchichi, 2013).

The shortage of teachers who are qualified to teach students with specific identified disabilities is at crisis level in many schools. This is mainly due to the lack of funding at teacher training level since most universities and colleges can only train a certain number of students at a time. There were cases where there was no single specially trained teacher in a school yet there were many students with visual or hearing impairments:

> *For me a primary school trained teacher when I went to college, we never had a subject or course on disability, on how to cater for children with say, hearing impairment. We never had that experience. But when I was coming from college straight into my one year of practice, I was given a class of people with hearing impairment and I didn't have the skills to teach those children. And I think it took me over two terms to learn sign language because I never thought I would teach sign language. I was never trained for that at college.*

It is likely there were many other teachers with similar experiences. Teacher candidates cited examples of other instances where specialist teachers were deployed to schools where there would be students with disabilities different from what they had been prepared for in their training. Sometimes this was exacerbated by a crisis of training capability which is aptly summarised by this teacher educator quoted below:

> *There is never enough time and money to do what we are supposed to do to train the teachers as much as would make them ready for their work. There is need for sign language specialists but we do not have resources. There is need for production of books in Braille for blind students. There is need for increasing the numbers of specialist trainees. ... Many students are not going to school because of lack of instructors in schools.*

The other critical issue voiced by almost all teacher candidates and teacher educators in Zimbabwe was the issue of overcrowding in classrooms. Teacher candidates narrated personal struggles with teacher-pupil-ratios which could in some schools be as high as 60 learners to one teacher in one classroom. Teacher candidates felt that given such numbers, it was not possible for a teacher to interact meaningfully and effectively with every child. As a result, teachers ended up concentrating only on those learners who were intellectually strong at the exclusion of the rest of the class:

> *Because it's tough, the teacher-pupil ratio. At my school it's 55 and above. Some it's up to 60. ... In my case when I started teaching at my current school, they said the class of intellectually-challenged students should have a ratio of one teacher to seven students,*

> *then it rose to one to 15. Now I have 35 kids with different learning difficulties in my class.*

The shortage of resources also inevitably affected the infrastructure in all the different institutions. Teacher candidates were quick to point out that even the education department at their university was not accessible at all to people in wheelchairs which meant that teacher education departments could not enroll any students who used wheelchairs. Furthermore, most schools were built a long time ago before the awareness of the importance of including learners with disabilities:

> There are some teachers who go to schools to start special needs education and the challenges are just insurmountable. In the end it's all just theoretical – the classrooms are inaccessible to students with disabilities, or the doors are not wide enough, or there are stairs but there are no elevators. The structures – there is no funding to change those structures. So I am saying, it's not at my school only but most of the schools, because they were built like that. We do not even have one toilet which is suitable for those who are wheelchair users. So, the infrastructure is just not user-friendly.

The problem of resources poses a serious barrier to any form of inclusion that the institutions might attempt to put in place. The dominant obstacle in all these narratives is access to resources, which means that parity of participation is not possible for these learners because of economic structures that deny learners the resources they need in order to interact with others as peers (Fraser, 2009). Given that economic inequality undermines an individual's capacity to participate on par with their peers, this dimension is fundamental to achieving inclusion. Yet, as the respondents indicated, the shortage of resources is so critical that for teachers, as much as they may aspire to practice inclusion, the reality of their situation makes it impossible. There is overwhelming evidence of the challenges that need to be overcome. With 50 to 60 students in one class, it is not possible to give any meaningful attention to students, let alone give every student a chance to participate. Even in situations where teachers initiate programmes to include students who have disabilities, there is no funding available to support these programmes. In cases where funding could be available, the teachers do not have the requisite training to deal with the diverse needs of students.

These issues of extreme shortages of resources and the impact on participation connect well with Tronto's views on care as attention and competence (Tronto, 1993). The picture that emerged is that both teacher educators and the teacher candidates do pay attention to their students, and they therefore recognise the existence of need and inequality in their context. However, there was no

evidence that the responsible authorities have accepted their responsibility to address the need. The first moral aspect of caring is attentiveness (Tronto, 1993), and it includes recognising the existence of need and inequality in society and then taking responsibility to address the identified need. Attention is drawn to poverty and inequality and the need for all persons to have the capacities, time and resources to enable them to lead human and flourishing lives. Still, there is no capacity in which Tronto's theory refers to competence as being a prerequisite for delivering care. In the context of educational institutions, for example, inclusion would begin with the recognition that there are always marginalised others among us (Zembylas & Bozalek, 2011), but that recognition is not an end in itself. Beyond the teacher educators' recognition of the different vulnerabilities of students, is the competence to address the needs. The ethic of care involves more than just the experience of an affective state; it involves competent action and sometimes collective action (Sevenhuijsen, 2003b). Those who give care should ensure that care needs are adequately met by providing adequate resources including material resources, time and sometimes skills. Talking about the impossibility of competent action, one Zimbabwean educator cited insurmountable challenges in the form of inaccessible classrooms and inadequate funding. These comments raise important issues about care as competence. For care to be possible, the decision-makers have to make adequate resources available. The different experiences clearly indicated that teachers sometimes find themselves in extremely difficult conditions such that it is not possible for them to practice inclusive care. There is also the issue of shortage of skills as part of competence. Most teacher candidates felt that sometimes it was entirely impossible to deliver care because they had not received adequate preparation and training for the different challenges they had to deal with in practice, especially for teachers who had to deal with students with disabilities. As another Zimbabwean educator said:

> *I am a primary school trained teacher but when I went to college, we never had a subject, on how to cater for those children with say, hearing impairments. We never had that experience. We talked more about gifted kids. ... It was wrong for the ministry to first introduce the concept of inclusion before training the teachers, and before equipping the facilitators who are supposed to implement the inclusive education.*

Teachers find themselves in extremely difficult situations when they have to deal with students who have impairments that the teachers have never dealt with. Thus, even when the resources might be available, teachers need the relevant skills to be able to deal with those situations.

8.5 Retroductive Analysis: The Politics of Education

As noted earlier, there was a visible absence of discourses of equity and social justice from both the document study and the interviews. Secondly, while the socio-historical conditions have several similarities with the other two contexts, the situation in which higher education finds itself is different in many material respects, particularly the impact of the economic meltdown and the inevitable consequences on education and social justice.

Zimbabwe's history, as is the case with South Africa, includes a pre-independence legacy of unequal educational provision on racial grounds (Drury, 2013). At independence, therefore, the new Zimbabwean government set about transforming the system and embarked on wide-ranging reform which saw education being established as a fundamental right for all people. The government soon committed itself to most global education goals and policies by quickly ratifying all international conventions, including *Education for All* (1990) and the Millennium Development Goals (2000). For a little while, the right to education for all Zimbabweans existed both in principle and in practice before Zimbabwe began to experience serious policy reversals as a result of both political and economic turbulence. Most people ascribe this major reversal to the adoption of the Economic Structural Adjustment Programmes (ESAP) of the early 1990s, which were prescribed by the International Monetary Fund and the World Bank. In the majority of cases where these market mechanisms have been put in place, the first symptom is the displacement of the State from essential public services like education and health (Ozga, 2011). As Ozga further observes, part of the ESAP package was that "these services [were] then usually outsourced to hybrid public-private organisations, and there [was] an increasing devolution of responsibility for self-management, choice-making and the management of risk to individuals and families and away from State institutions" (p. 307). Once these transnational actors got a foothold in the country, the social justice implications, that will be outlined below, cannot be overemphasised. For example, the immediate effect of austerity measures adopted under ESAP was an all-round reduction in public spending which led to severe budget cuts for the education sector. This marked the death of the universal education policies that had been put in place soon after independence. The accompanying policy changes saw the re-introduction of school fees for primary schools and the total reversal of the principle of free and compulsory education that had been enacted in 1987 (Kanyongo, 2005).

Unfortunately for Zimbabwe, once that trend of diminishing government support to education began, it never abated. These austerity measures further sharpened long-standing inequalities and completely compromised the state's ability to deliver on equity. Government's financial responsibility to education continued to decline drastically alongside the deteriorating economic and political situation. The years 2000-2008 saw a total collapse of the economy. According to Bornstein (2003), this degenerating political economic environment allowed for the development of a neoliberal discourse of "free markets", which the desperate and weakened government could do little about. Because the government was literally bankrupt, the funding system for education totally collapsed and the state depended heavily on non-governmental organisations (NGOs) and other donor organisations. Inequalities in education grew as all social safety nets were eroded, hurting particularly the poorest and the most marginalised (UNESCO, 2012). Those most affected include poor working-class and the rural population. Mushunje (2006) suggests that the pursuit of a neoliberal economic policy trajectory further constrained the capacity of families to pay for the education of their children as industries closed and workers were laid off en masse.

In Zimbabwe, these neoliberal policies have created a range of social changes and ideologies that are implicated in the exacerbation of inequality (Shizha & Kariwo, 2011) and the equitable resourcing of schools has become the greatest challenge facing Zimbabwean education. Because of the collapse of the public school system, there has been a boom in the growth of private education and the reframing of educational institutions and bodies as competitive bodies. In my view, this partly explains the dominant trend in Zimbabwe of a discourse of education framed and driven by test scores as the number one priority for all stakeholders including government. Against this background, the previous concerns for equity and child development have certainly become far less important (Kanyongo, 2005). According to the Education Coalition of Zimbabwe, one of the organisations that advocates for inclusive quality education and equitable education for all, the possibilities for generating a discourse about fair and inclusive education have predictably vanished in the Zimbabwean educational milieu today (2018). Schools are in perpetual competition with each other for the best pupils and resources in order to achieve 'high standards'. This standards agenda that is built on the perception that schools should always aim to raise standards in order to maintain national competitiveness, has found a lot of ground while, on the other hand, issues of equity and social justice have been completely ignored (Shizha & Kariwo, 2011).

As the document analysis and the interviews from the Zimbabwean institution showed, the equity discourse has almost been virtually eliminated in Zimbabwe. While the special education discourse is clearly dominant, almost all the participants felt that it was so poorly funded that it only existed in principle. The analysis above showed the nature of structures and mechanisms in the Zimbabwean context that accounted for the absence of a discourse of equity and injustice.

CHAPTER NINE: CONCLUSIONS AND RECOMMENDATIONS

9.1 Introduction

In this chapter I reflect on the key findings of this study. I also discuss what my study has achieved and examine how the findings of the study could contribute to existing understandings of inclusion in teacher education settings and to the field of inclusion and social justice in education in general. I begin the chapter by briefly re-capping the conceptual framing of the study and end by suggesting areas for possible further study.

9.2 Conceptual Framing

This qualitative critical realist study was undertaken in order to better understand inclusion in teacher education. The purpose of this study was to examine the way inclusion is understood and enacted in particular teacher education contexts. Roy Bhaskar's critical realism provided the ontological and epistemological underpinnings for the study, and the research methods were also informed by critical realism at each stage. Critical realists are committed to identifying deep underlying, non-observable structures and generative mechanisms which have real outcomes in the world. As explained earlier (4.3.4.), the research process was one of continuous cycles of research and reflection and required critical engagement with participants' knowledge and experiences. In addition to using critical discourse analysis to analyse the data in Chapter Six to Eight, I used retroduction to understand some of the underlying structures and generative mechanisms in the real domain that did not necessarily appear in the narratives of participants. As outlined above, retroduction helps to unravel those mechanisms in the different contexts and larger social environments that constitute discourses that influence the different ways in which inclusion is conceptualised. Because some of the mechanisms that emerged were not actually observed to exist by the participants, I relied on my present understanding of the different contexts after reading about teacher education extensively across the three contexts. For example, the ideological shift from socialism in Zimbabwe – and the subsequent liberalisation which directly affected funding of social services – was not considered by participants to be an explanation for the lack of progress

in relation to inclusive education. This is one stage where familiarity with the context becomes crucial (Benton & Craib, 2001). Context becomes fundamental to the process of understanding and explaining the discourses. A good example in all the cases examined in Chapter Six to Eight was the importance of explaining in some detail the transformation processes that education has undergone over the years in all the three countries.

The order of the world we live in is that there is disparity in the distribution of resources. Most participants would have been aware that there was a social reality in existence in many places in their different countries where individuals or entire communities of people in their countries were systematically blocked from opportunities and resources that were available to other members of society (Silver, 1994). Schools do not function separately from the influence of social-political structuring of poverty and inequality which characterises the wider environment and the colonial and historical processes of exclusion and exploitation (Brock-Utne, 2011). An understanding of the enduring legacies of racial oppression and stratification in these countries would be an essential part of any meaningful conceptualisation of inclusive education. Most participants in this study understood the historical, sociocultural and ideological contexts that create discriminatory and unjust practices in education, including poverty and racism. This is inseparable from the social and cultural structures that generate relations of inequality and exclusion. This exclusion is not simply an economic phenomenon but also includes corrosive forms of alienation and marginalisation. Often these covert mechanisms and subtle forms of exclusion are lost behind policy rhetoric about inclusion. Because of these attitudes, learners who are already experiencing discrimination and marginalisation in different forms experience even more disadvantages. All three countries have to deal with these ingrained inequalities and social injustices.

9.3 Purpose of the Study

The study focused on individual teacher educators' and teacher candidates' understandings and experiences of inclusion as an aspect of social justice in teacher education and also examined aspects of curriculum and pedagogy in the selected universities.

The main research question was:

How is inclusion as social justice conceptualised and practiced in teacher education programmes in the three selected institutions in Canada, South Africa and Zimbabwe?

The sub-questions were:

1. How do teacher educators define inclusion in their different contexts?

2. How is inclusion practiced by teacher educators?

3. How is inclusion understood and experienced by teacher candidates in higher education spaces in Canada, South Africa and Zimbabwe?

9.4 Findings of This Study

This study found, first, that in the Canadian university, the teacher educators' understandings of inclusion generally indicated a major departure from the usual disability discourse to focus on systemic educational change which encompasses issues of equity, social justice and equal educational opportunities for all learners. It was also noted that even the teacher candidates in the institution generally shared the same conception of inclusion which transcended the narrow contemporary emphasis on programme placement. The equity discourse permeated most of the narratives of participants and by looking at the different documents, it was evident that many policies and pieces of legislation inevitably focused on the concept of equity.

As noted earlier (see 6.2.1), conceptualisations did differ among participants but the thread that unified them was the emphasis on the need to centre inclusive education on equity and learner participation (Fraser, 2009) in curriculum, by paying attention to those learners who are marginalised by educational policies and by a curriculum that does not validate their experiences (Portelli, 2013). Inclusion as articulated by teacher educators, clearly aligned with Fraser's three-dimensional theory of social justice which represents ways of bringing claimed disparities of social participation to public prominence (Fraser, 2005). In terms of curriculum and practice, most teacher educators asserted that they had designed their curriculum in ways that could benefit all students, including the least privileged members of society and those who had historically

experienced multiple and intersecting forms of social and educational disadvantages on the basis of their identity. This was also evident in the policy documents and course outlines. There were clear efforts by teacher educators to transform curricula and pedagogy in ways that afforded positive recognition to all students.

This study found, second, that most of the teacher educators in the South African institution defined inclusion largely in terms of diversity and helping students overcome learning barriers. Once again, I noted a clear shift from the special education discourse. There was a distinct emphasis on diversity in the sense of learners' different needs and different abilities and characteristics. Inclusion was largely viewed in terms of recognising the needs of the learners and doing what was necessary to make them "genuinely realise their potential". There was additional emphasis on recognising that every child in the classroom was an individual with different needs. For that reason, some participants did not make a distinction between inclusion and differentiated instruction in their definitions.

Furthermore, while conceptualisation generally went beyond the special education model outlined above, it was also noted that some participants were significantly concerned about what they saw as a deficit approach by teacher educators. Inevitably this boils down to concerns about race and racism. Deficit thinking blames educational failure on individual and family shortcomings rather than on institutional or structural practices and power relations (Portelli, 2010). In this instance, it was felt linguistic shortcomings, limited desire to learn and sometimes disruptive behaviour were among other barriers and deficiencies that obstructed student learning and were associated with particular racial groups. Consistent with those views, the definitions proffered by the teacher educators were clearly silent on issues of social injustice, and in some cases, reference to opportunities for equal participation for all students were totally absent. The definitions were particularly silent on issues of cultural recognition that would address the concerns about curricula that did not reflect adequately the different identities of students and their cultures and disparities that emerge from the different experiences of students of different race groups.

The study also found that most teacher candidates in the South African case defined diversity in terms of increasingly heterogeneous populations. Their definitions focused more on a wholly systemic transformation of the education system that included not only equal educational

opportunities to participate, but also change of pedagogy and curriculum. This was seen in the persistent references to the need for decolonising the curriculum in South Africa and the recognition of indigenous languages as languages of teaching and learning. Similarly, most teacher candidates defined inclusion in education more in terms of "equity" and consideration of learners' different cultures, different backgrounds, traditions and languages. In my view, these differences in the way teacher candidates perceived inclusion go a long way to show, firstly, that perceptions of inclusion can differ even in the same educational context, and secondly, that these perceptions are effectively shaped by the individual experiences of the participants and their social position.

Third, and as the document study on the Zimbabwean university explicitly shows, the boundary between special and inclusive education remains blurred both in principle and policy stipulations. The dominant conceptualisation of inclusion in this context was essentially that learners at school should not be separated based on their disabilities or exceptionalities. Both teacher educators and teacher candidates showed considerable familiarity with the term inclusion, but the study found that in their contexts, inclusion was not viewed as distinct from special education. Inclusion was still viewed strictly as proximity integration and synonymous with special education in which practice only targets populations with disabilities. The primary focus was on enabling disabled students to overcome barriers to learning and participation by providing specialist educational measures and interventions intended to respond to specific forms of impairments. The concept of inclusion has not been broadened beyond traditional disability categories and integration of disabled students in mainstream classrooms.

From looking at the three countries, it was evident that inclusion still means different things to different people, reflecting contrasting theoretical and ideological orientations from which inclusion is considered, yet inclusion remains a major educational policy concern across the three countries. In spite of the disparate conceptualisations, the study found that there was a growing awareness across the three countries of the fact that the preparation of teachers was a key element in developing inclusive education. This recognition was also evident in the findings of this study through teacher education curriculum documents in all the universities under study, several of which made reference to inclusive education – although the understandings and practices were different in each institution.

The study also found that generally, in the context of the three institutions, pre-service teacher education has not adapted sufficiently to train teachers adequately for contemporary classroom environments which were a lot more diverse in terms of culture, language and other technology. In the Canadian university for example, teacher educators noted that there was inadequate time allocated within initial teacher education programmes to address issues of inclusion and equity, with teacher education courses mainly focusing on technical concerns like classroom management, lesson planning, learner assessment and teaching strategies. The curriculum content was biased in favour of traditional teaching skills as opposed to concerns about diversity and equity. Even in this institution where significant value is attached to inclusion, the courses had very limited content on inclusion or social justice. Similarly, in South Africa, the inclusion aspect seemed to be an add-on aspect at the discretion of the individual teacher educator who had to prepare her own teaching materials, there being no official curriculum to be followed at that level. In the Zimbabwean university, inclusion was only part of the curriculum for specialised teachers who were explicitly being prepared to work with students with disabilities. The rest of pre-service teacher preparation did not even include special needs as part of their curriculum. In general, there was no clear evidence that initial teacher education had embraced the fact that successful teaching and learning in inclusive classrooms is largely predicated on the teachers' knowledge and understanding of what inclusive education is.

The study found that some teacher educators in the three universities held very profound views and understandings of inclusion although it was understood differently in the different contexts as outlined above. This finding runs counter to the widely expressed view that teacher educators are usually "underprepared for inclusion" (Forlin & Chambers, 2011). Widely reported research found that most newly-graduated teachers continued to report that they were underprepared for inclusive classrooms and that they did not possess the essential training competences needed to deal with inclusive practice (MacBeath et al., 2006; Gokdere, 2012). The main explanation for this situation was the lack of knowledge, experience, and commitment and understanding of inclusion on the part of faculty members who trained teachers (Ewing, Monsen, & Kielblock, 2018). Contrary to that, this study found some individual teacher educators who showed profound awareness and knowledge of equity and inclusion and in some cases practiced it consistently.

In the Canadian institution for example, most teacher educators and teacher candidates had consciously taken the view that inclusion should be viewed as a solution to an unjust education system that denied equal opportunity to certain groups of learners due to their identities, especially those learners who come from historically marginalised groups. There are many factors of course that have contributed to this position but partly and in a general sense, Canada has enjoyed political ideology and historical legacies that have nurtured and prioritised human rights and equality for some time now. Multiculturalism and diversity have encouraged educational transformation that is grounded in the ideals of social justice as equity and access to equal educational opportunity. From my interviews with participants, it was evident that teacher educators and indeed many teacher candidates deeply understood the historical and sociocultural and ideological contexts that created unjust and sometimes discriminatory practices in education. In the Canadian university for example, the teacher education department had officially adopted a policy of "Indiginating", which is a policy and approach that seeks to transform existing curriculum in order to include the knowledge and history of marginalised groups in general and indigenous knowledge in particular. Through such a policy, teacher educators seek to ensure that curricula do not continue to promote racialised constructions of 'otherness' and reinforce stereotypes of inferiority of other knowledges as before. Even in cases where teacher educators might understand inclusion differently and there might not be a systemic framework of inclusion as in the South African university, there was ample evidence that individual teacher educators practiced inclusion in their curriculum and pedagogical practices as they understood it. More so, teacher candidates expressed very profound perspectives about inclusion.

Finally, in relation to the question of teacher candidates' experiences of inclusion, the study found that the principal challenge for inclusion was implementation. For example, as most Canadian teacher candidates emphasised, in spite of national proclamations of inclusivity, marginalisation still exists for many groups of students, especially racial minorities and recent immigrants (see 6.2). In the South African university as well, most of the teacher candidates said that there was little evidence of actual inclusive practice in the schools they had worked in. From their teaching practice in different parts of the country, most teacher candidates felt that both school leaders and in-service teachers did not show any awareness of inclusive practice, and there was certainly no evidence in school policies and curriculum that inclusion was an important aspect of teaching and

learning (see 7.2.2). Similarly in Zimbabwe, teacher candidates felt that very little had been put in place by the different stakeholders to ensure that inclusive education could indeed be a reality.

9.5 Contribution of Study

In this comparative study, I examined conceptualisations of inclusion in one department of education in one institution of higher learning in each of the three different countries. The purpose of my inquiry was understanding and constructing knowledge as opposed to discovering knowledge, so it was therefore necessary to locate the study in a critical realist qualitative paradigm. And consistent with critical realism, the constructed knowledge is not absolute truth that remains stable and generalisable across all possible contexts. As Danermark et al. (2002) point out, all explanation, be it of natural or social phenomena, is incomplete because of the ontological reason that the objects of study are undergoing continuous historical change, and the epistemological reason that all knowledge is revisable. Nevertheless, this constructed knowledge remains valuable as a socio-historical artefact (Fletcher, 2017) which exists within specific contexts and perspectives.

Although there are fundamental differences between contexts as shown in this study, many of the discourses that emerged like equity and diversity could be relevant across contexts. A comparative study such as this one enables education practitioners to develop an understanding of variations and patterns in the ways in which inclusive education is shaped by political and societal structures which could help teacher educators to challenge their assumptions about teaching and learning. While it is true that education systems evolve over time both in terms of policy and practice and in specific contexts (Meijer, 2003), it is still possible to discern regularities and differences that could be beneficial across national contexts. Similarly, learning from other people's different experiences and paying attention to similarities and differences can contribute to cross-cultural awareness which can ultimately contribute to improvement of teacher preparation programmes in relation to inclusion.

This study contributes to the understanding of inclusion that can provide a baseline for further studies in teacher education aimed at preparing teachers to work in schools where pupils come from diverse social, economic, language and cultural contexts. This study can also help educators

better understand the intersection of inclusion and social justice in educational systems that serve culturally and linguistically diverse students. A more comprehensive treatment of the idea of inclusive education as a means of contributing to social justice could enable educators to address the historical inequities that have affected marginalised learners.

I also hope that the findings of this study will contribute to a better understanding of the structures and mechanisms that shape understandings of inclusion as an aspect of social justice in particular contexts. This transformation should be understood in the context of critical realism as an emancipatory force. As was explained in detail earlier (see 4.3.3), Bhaskar's critical realism is 'critical' in the sense that it encompasses a concern for transformation of the social world through the identification and deconstruction of societal structures that promote social injustices. As Zembylas (2006) argues, one function of research is to challenge social institutions and existing policies and practices in order to bring about progressive change. The issues raised in this study therefore should not be viewed as an end in themselves, but a starting point for change in higher education that is based on a good understanding of the relationships between the events and the mechanisms that underpin those events.

The order of the world we live in is that there is disparity in the distribution of resources. Schools do not function apart from the influence of social-political structuring of poverty and inequality which characterise the wider environment and the colonial and historical processes of exclusion and exploitation (Brock-Utne, 2011). This is inseparable from the social and cultural structures that generate relations of inequality and exclusion. Most participants understood the historical, sociocultural and ideological contexts that create discriminatory and unjust practices in education including poverty and racism. This exclusion is not simply an economic phenomenon but also includes corrosive forms of alienation and marginalisation. Often these covert mechanisms and subtle forms of exclusion are lost behind policy rhetoric about inclusion. Because of these attitudes, learners who are already experiencing discrimination and marginalisation in different forms experience even more disadvantages. All three countries have to deal with these ingrained inequalities and social injustices.

9.6 Recommendations for Further Study

In my view, possible areas for further research include curriculum and pedagogy for diversity and social justice. There is a need to examine existing curriculum frameworks and the assumptions on which they are based. The avenue for further study would be to examine teacher education curricula, in particular to understand why in many cases, as the study found, there has not been significant transformation in curricula and pedagogy to include and recognise the knowledges and histories of formerly marginalised groups. In most teacher education curricula, the focus continues to be on classroom management and assessment. It would be important to ask questions about how teacher candidates can be educated in ways that are consistent with public aspirations for inclusion and social justice, what knowledge could be considered important for inclusion in the contemporary curricula and how it should be arranged. It is imperative at this stage to consider how institutions of higher learning can evolve pre-service programmes which ensure that future generations of teachers enter the profession of teaching with requisite skills and knowledge to work in inclusive classrooms. Instead of just emphasising technical issues, curriculum development would include rethinking teaching strategies and organising knowledge in ways that support inclusion (Kozleski & Waitoller, 2010).

Another potentially fruitful avenue of investigation might be the experiences of new in-service teachers with respect to implementation of inclusive practice. It was evident from this study that most teacher candidates have a good understanding of inclusion which suggests that there could be many others already in the field, who have had the experience of inclusive practice in the real world. It would therefore be important to explore how inclusive practice has been received in the school system and the challenges that exist.

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Appendices

Appendix A: Participant Invitations

Invitation to participate in a research project: Teacher Educator

402-375 Bay Mills Blvd
Toronto. M1T2G6
Cell 905 2513761
March, 13, 2017

Dear Participant

RE: Invitation to participate in a research project titled: "Perceptions and practices of inclusion as social justice"

I am conducting interviews as part of a research study to examine the extent to which teacher education across higher education systems has acknowledged and embraced its role to ensure that their graduates acquire appropriate knowledge, skills and attitudes that further educational inclusion in the school systems. I would like to invite you to be one of the 4 participating teacher educators.

This comparative study focuses on the way inclusion is understood and enacted in different institutional contexts and the individual teacher educators' understandings and enactments of inclusion and social justice in their practice. I believe that as a teacher educator you are in an ideal position to share your understandings and experiences of inclusion and social justice in the context of the existing curriculum and pedagogy in your institution.

The interview will take approximately 45 minutes and all the data from this interview will be recorded and transcribed and will be used in the final report but all this information will be treated with the greatest confidentiality.

This research is only for academic purposes, but it is hoped that this comparative study will meaningfully contribute to the debate around meanings and practices of inclusion in teacher education and to the increasing attention across the globe to preparing teachers as a key element in developing inclusive education systems.

Allow me to thank you in advance for your cooperation.

Yours Sincerely

Ellison Musara

Invitation to participate in a research project: Teacher candidate

402-375 Bay Mills Blvd Toronto.
M1T2G6 Cell
905 2513761
March 13, 2017

Dear Participant

RE:Invitation to participate in a research project titled: "Perceptions and practices of inclusion as social justice"

I am conducting a focus group interview as part of my research study to examine the extent to which teacher education across higher education systems has acknowledged and embraced its role to ensure that their graduates acquire appropriate knowledge, skills and attitudes that further educational inclusion in the school systems. I would like to invite you to be one of the 8 participants.

My study will focus on the way inclusion is understood and enacted in your institutional contexts including curriculum and pedagogy on your program to establish the extent to which the teacher education program attempts to develop knowledge, skills and dispositions that will enable teacher candidates to teach in ways that enhance inclusion and social justice. I believe that as a teacher candidate you are in an ideal position to provide some deep personal insights, experiences, understandings, opinions and views about this topic.

A focus group is an informal discussion where participants are encouraged to talk to one another asking questions, exchanging anecdotes and commenting on each other's experiences and ideas on a topic. This group interview will take approximately one hour and all the data from this discussion will be recorded and transcribed and will be used in the final report, but all this information will be treated with the greatest confidentiality.

This research is only for academic purposes, but it is hoped that this comparative study will meaningfully contribute to the debate around meanings and practices of inclusion in teacher education and to the increasing attention across the globe to preparing teachers as a key element in developing inclusive education systems.

Allow me to thank you in advance for your cooperation.

Yours Sincerely

Ellison Musara

INTERVIEW CONSENT FORM

---------- hereby agree to participate in this research regarding perception and practice of inclusion as social justice in teacher education. I give the researcher, **Ellison Musara**, permission to use the material which is generated during the course of my participation and I understand that the researcher is a PhD scholar who intends to use the data collected here in his thesis. In addition, I have also been informed that a detailed, prescribed

application was submitted to the Research Ethics Committee of Rhodes University for approval to conduct this research.

I also understand that:

- my participation is entirely voluntary and that I have a right to withdraw from this activity at any stage of my participation. In addition, the researcher recognises his obligation to respect my rights and values as a participant.

- I have been informed of the purpose and nature of the study

- while the data from this interview will be recorded, transcribed and used in the final report, the researcher will use all material generated through my participation for the purpose of this study only and not for any other purpose.

- Inasmuch as findings from the research may be published in institutional reports or presented at academic conferences, my own identity or that of any other person included in my materials will be protected.

- confidentiality and anonymity will be maintained through the removal of any identifying characteristics before dissemination of information and no information will be used that reveals my identity in any way.

- my signature below indicates my permission to be part of this study in the various ways explained above.

- Signature of participant: ----------

  Signed at _____ (place) on _____ (date)

Appendix B: Interview Protocol

1. What is inclusion/ inclusive education? (perception/understanding)

2. What qualities would an inclusive teacher need to have? What would inclusive practice look like? (perception)
3. In what ways do teacher educator practices model inclusion for their students? (practice)
4. How do curriculum processes such as the organisation of teaching and pedagogic practices for these purposes address issues of inclusion and diversity? (perception/practice)
5. How does the culture and processes of the institution or the wider policy frameworks enable or constrain effective practice of inclusion? (practice)