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# Financing of Special Needs Education

A seventeen-country Study of the  
Relationship between Financing of  
Special Needs Education and Inclusion



Editor: Cor J.W. Meijer

**European Agency for Development  
in Special Needs Education**

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# Preface

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**T**his report focuses on the current state of the art in the financing of special needs education and its relationship to inclusion policies and practices in 17 European countries, i.e. all the countries of the EU and Norway and Iceland. These countries are members of the European Agency for Development in Special Needs Education.

The report was prepared during the autumn of 1999 and the descriptions and findings refer to the situation in countries until the end of 1998. During the project - which began in 1997 - a questionnaire was sent to all the Working Partners of the Agency member countries. These working partners submitted country reports concerning the two key topics: financing and inclusion. On the basis of these country reports, this synthesis report was written.

The report is relevant for organisations and actors who are involved in international, national and local policy-making. The report contains information and findings that will be of great interest to all of those who are involved in developing and implementing inclusion policies and practices across Europe and elsewhere.

The study clearly shows that the financing of special needs education is one of the most important factors in realising inclusive education. If the financial regulations are not in accordance with the current inclusion policy, it is very unlikely that inclusive education will occur. Moreover, it is demonstrated that all funding mechanisms entail certain incentives, some of them even rewarding the segregation of pupils with special educational needs. It is therefore necessary to challenge these mechanisms and to change financial policies in such a way that inclusive education is more easily implemented. This study shows how that may be achieved.

Jørgen Greve, Director  
November 1999



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# Executive Summary

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**T**he report of the European Agency on **Provision for Pupils with Special Educational Needs** (Meijer, 1998) revealed that European countries have quite different approaches towards the education of pupils with special educational needs. Some countries segregate high proportions of their pupils in special schools or special classes. Other countries educate only small proportions of pupils with special educational needs in separate provision. These differences, which may vary between less than 1% to more than 5%, are the result of many factors. These factors have been extensively addressed in studies of different organisations and research institutes. Researchers have pointed to the differences in history, policy, demographic and geographical factors, but also to different societal views on disabled people and the resulting approaches in provision for them.

The European Agency study of 1998 underlined these factors and also identified the relevance of factors related to the population density of countries. It found a high correlation between the percentage of pupils in segregated provision and the population density of the European countries. It was assumed that in countries with a low population density, segregation in separate special schools has some disadvantages (practical, social and financial), whilst in countries with a high population density, special placements have less negative consequences.

Thus, several factors are responsible for variation in inclusive practices within and between countries. Recently attention has been given to another relevant factor in realising inclusive education: the way education - and more specifically special needs education - is funded. It is assumed that funding largely determines the types of provision that have been developed and implemented.

On the basis of data from 17 European countries, that is all the member countries of the European Agency for Development in Special Needs Education, an analysis has been made in this study of the different funding systems and of the impact of financing on inclusion. This key factor - financing of special needs education - has not been addressed before on such a wide scale. Of course, some researchers have pointed out the relevance of this factor upon inclusive education, but none have covered the subject by way of making international comparisons.



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(However, it should be noted here that the OECD is currently conducting research related to this topic).

In approaching this challenging goal, member countries of the European Agency for Development in Special Needs Education were asked to submit country reports on the basis of a questionnaire that was constructed by the secretariat of the European Agency. This questionnaire contains questions on two main areas within the field of special education: provision and financing. The questionnaire is included in this report (Appendix A).

All member countries submitted country reports, which were analysed centrally and integrated into the analytical framework that was developed at the beginning of the study.

The descriptions of the type of provision for pupils with special educational needs are based on the country reports that were submitted for the earlier 1998 study on special educational needs provision. These descriptions were updated for the current study on financing and, as such, can be regarded as the current “state of the art” of special provision in member countries. With respect to provision for pupils with special educational needs, the country descriptions address a wide range of topics that can be regarded as important issues within the field of special needs education i.e. policy, assessment and provision for pupils with special needs, numbers of pupils with special needs.

The description of the finance systems that are currently used within member countries focuses on different aspects of the “funding issue”. These include decision-making processes in relation to funds, the use of funds, effectiveness of funding, efficiency, strategic behaviour and accountability.

The goal of this study is to analyse the relationship between funding and inclusion. As previously stated, this goal is very challenging and the aims have to be modest. Nevertheless, it is argued that this study can contribute to the general understanding of this complex issue. An attempt has been made to develop the analysis of the relationship between funding and inclusion, as well as to contribute to the debate and subsequent policymaking on national and international levels. It is felt that this contribution can be achieved by firstly *providing results* of the analysis and secondly by *providing an analytical framework* that could be used in order to find new ways of re-structuring financial policies in order to stimulate inclusive practices. As such, it is the goal of the study to develop an analytical framework that can be used in order to rationalise the debate.

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The study report is organised in the following way:

**Chapter One:** a short introduction to the study.

**Chapter Two:** the methodology and framework used in the study are described.

**Chapter Three:** the country descriptions are given. For each country the type of provision for pupils with special educational needs is presented and then the financing of special needs education is dealt with. All country descriptions follow the same systematic order and address the same issues.

**Chapter Four:** provides a more thematic view on the issues concerning financing of special needs education. Different funding models are described on the basis of two main parameters: destination locus (who gets the funds?) and funding conditions (how are funds allocated?). It shows that it is possible to group the current funding practices into a number of categories. The advantages and disadvantages of these models are discussed. This chapter provides an *empirical* evaluation (based upon the direct research of this study) of funding and inclusion.

**Chapter Five:** whereas Chapter Four provides an empirical base from which the further development of financing of special needs education can be considered, chapter five contains an *analytical* evaluation where an attempt is made to predict and theorise about possible outcomes of different strategies and courses of action. It provides an analytical approach to the issue of financing and inclusion. All the possible theoretical funding models are briefly addressed and these models are analysed and then evaluated on the basis of an elaborated framework of criteria.

**Chapter Six:** presents conclusions based upon a consideration of what 'good' funding models may look like.

The key findings of the study can be summarised in a number of key points. The study revealed that financing of special needs education is one of the most significant factors determining inclusion. If funds are not allocated in line with an explicit policy, inclusion is unlikely to be realised in practice. That is clearly demonstrated in this study. The mechanisms of financing may explain discrepancies between general policies and practical organisation and implementation. In fact, financing could be regarded as one of the most important factors that may contribute to the further development of inclusive practices.

In more detail, the study reveals:

1. In countries where the finance system is characterised by a direct input funding model for special schools (more pupils in special schools - more funds), the most criticism is raised. These countries point at the different forms of strategic



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behaviour within the educational field (by parents, teachers or other actors). These forms of strategic behaviour may result in less inclusion, more labelling and rising costs. A great deal of money is spent on non-educational matters such as litigation, diagnostic procedures and so on. It is not surprising that these countries can be identified as having relatively higher percentages of pupils with special educational needs in separate settings.

Some countries state quite firmly that the finance system influences their special education practices negatively. For some countries, this finding is the main impetus for drastically changing the finance system of special needs education.

2. A second finding is that countries with a strong decentralised system, where the region or municipality has the main responsibility for the organisation of special education, generally report positive effects of their systems. These countries mention almost no negative side effects to their systems and are generally very satisfied with their finance systems. Systems where the municipalities make decisions on the basis of information from school support services or advisory centres and where the allocation of more funds to separate settings directly influences the amount of funds for mainstream schools, seem to be very effective in terms of achieving inclusion.
3. Pupil bound budgeting seems to have some clear disadvantages. At times mainstream schools are eager to have pupils with special needs (and their budgets) within their brief. However, it is likely that they prefer pupils (with budgets) who do not cause them too much additional work. In addition, parents will always attempt to get the best for their child and, as a result, will try to get the highest amounts of special needs funding.

This pupil bound budget system does not appear to be advisable for pupils with milder special needs. Criteria for learning disabilities are vague, ambiguous and change over time and this in itself may be a source of debate if budgets are linked to pupils. In practice, only clear-cut criteria are useful if funds are tied to pupils. If it is not possible to develop these, it seems that pupil bound budgets should not be used. Generally, it appears desirable that funds are spent on special *education* itself (in an inclusive setting), instead of on bureaucratic procedures such as diagnosis, categorisation, appeals and litigation.

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4. The descriptions of financing of special needs education in the member countries reveal that funding models are currently in the process of being developed. In some countries, major changes are expected or have recently been implemented.

There are a number of areas in which improvement of the financing of special needs education could be made. On the basis of this study, the following recommendations can be highlighted:

1. A so-called throughput-model at the regional (municipality) level seems to be the most successful option, especially if some elements of output funding are incorporated. In such a model, budgets for special needs are delegated from central level to regional institutions (municipalities, districts, school clusters). At regional level, decisions are taken as to how the money is spent and which pupils should benefit from special services. It appears to be advisable that the institution, which decides upon the allocation of special needs budgets, firstly, can make use of independent expertise in the area of special needs and secondly has the tools to implement and maintain specialist strategies and services.
2. It is apparent that inclusion can be more easily achieved within a decentralised funding model as compared to a centralised approach. From a centrally prescribed plan, too much emphasis may be put on the organisational characteristics of that specific model without inclusive practices being realised. Local organisations with some autonomy may be far better equipped to change the system. Therefore, a decentralised model is likely to be more cost-effective and provide fewer opportunities for undesirable forms of strategic behaviour. Nevertheless, it is obvious that the central government concerned has to clearly specify which goals must be achieved. Decisions concerning the way in which such goals are to be achieved is then left to local organisations.
3. An important concern in a decentralised system is the issue of accountability. Clients of the education system and taxpayers in general have a right to know how funds are spent and towards what end. Accordingly, some kind of monitoring, inspection and evaluation procedures seem inevitable elements of funding systems. The need for monitoring and evaluation is even greater in a decentralised model compared with more centralised options. Independent



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evaluation of the quality of education for pupils with special needs is therefore part of such a model.

It is intended that this study will form the basis of a rational debate at various levels of policymaking concerning the question of how funding may enhance inclusive practices. The premise of the study has been that it is *not* wise to initiate this debate with the question: which funding model should be imposed onto a certain country or region? Rather, it is argued that it is far more effective to begin any debate with an analysis of existing funding mechanisms; to then closely examine the incentive structure that these mechanisms entail and to suggest current model adaptations to in such a way as to incorporate the findings of this study.

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# 1 Introduction

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**S**everal factors are responsible for variation in inclusive practices within and between countries. Recent attention has been given to another relevant factor in realising inclusive education: the way education and more specifically special needs education is funded. It is assumed that funding largely determines the types of provision that have been developed and implemented. Thus, it is also assumed that the system of funding influences the inclusion or segregation of pupils with special needs in education. On the basis of data from 17 European countries, that is all the member countries of the European Agency for Development in Special Needs Education, an analysis has been made of the different funding systems and of the impact of financing upon inclusion.

In *Chapter 2* the conceptual framework for the study is elaborated upon and the procedures and methodology clarified. Firstly, the general approach that is used in the study is described, followed by an outline of the content of the study and the issues that are addressed. Finally, some methodological issues are dealt with.

In *Chapter 3* the country descriptions are given. Two different angles are used here. First, for each country an overview is given of the state of the art of special education in that country. Information provided covers the policy and practice of inclusion, assessment procedures, categories of special educational needs, the current provision for pupils with special educational needs and the number of pupils with special educational needs. Then the funding system is addressed, along with a number of highlighted issues. These include decision-making processes, the use of funds, effectiveness, efficiency, strategic behaviour and accountability.

*Chapter three essentially provides the background information - raw data - for the subsequent analysis in this study. A great deal of detailed information is provided and therefore it is presented in a set format (countries listed in alphabetical order with the same systematic order of nine topics of information and related issues being addressed) for readers to refer to specific aspects of a country's system or cross reference aspects as they need.*



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*Chapter 4* gives an overview of the main developments, findings and emerging issues. The situation in the participating countries is described in line with the different central concepts used in this study. Chapter 4 aims to give a thematic presentation of the data information fully detailed in Chapter 3.

*Chapter 5* provides a full discussion of the main question for this study. What is the relation between funding and inclusion.

*Chapter 6* presents the overall conclusions of the study.

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# 2 Framework and methodology

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## 2.1 Introduction

In this chapter, the conceptual framework for the study is elaborated upon and the procedures and methodology clarified. The following sections firstly describe the general approach that is used in the study (2.2), then outline the content of the study and the issues that are addressed (2.3). Finally, some methodological issues are discussed (2.4).

## 2.2 General approach

The general approach used in this study follows the format used in the earlier study of the European Agency, **Provision for Pupils with Special Educational Needs**, published in 1998. It is also comparable with the methodology that is frequently used by other international organisations such as the OECD (see the OECD-CERI study on school integration). The procedure used was as follows:

- The European Agency Secretariat constructed a questionnaire (see later for specific details and Appendix A for a full copy)
- National co-ordinators answered the questions by submitting thematic country-reports
- Central analysis and synthesis of information was undertaken by the Secretariat
- During this procedure there was an ongoing interaction between Secretariat staff and actors at the country level in order to facilitate the collection of additional information or necessary clarifications.

The national actors in the case of this specific project are the Agency Working Partners. These Working Partners are national co-ordinators who analyse documents, gather data and consult with experts. In sum, they co-ordinated the data processing and analysis of information on the national level.

As a central part of the data collection procedure, the Agency hosted numerous joint meetings where staff and Working Partners co-operated and where close attention was paid to: clarifying concepts used in the questionnaires; the design of the study and data gathering, data analysis and interpretation of the findings. The



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aim of these meetings was to attempt to improve the methodological quality of the study.

This procedure therefore has the same methodological characteristics, strengths and weaknesses as comparable models frequently used for similar international projects. Its main weakness is that the quality of the data depends heavily upon the quality of the material delivered by the Working Partners. The alternative, a more co-ordinated and central data collection method, guarantees more uniform methods of data collection, analysis and interpretation. However, such a procedure would be more costly and time-consuming. The main advantage of the approach used here is that the Working Partner model can quickly take the specific context of a country into account and easily prevent misinterpretations of information.

### **2.3 Conceptual framework and questionnaire**

The aim of the study was to assess the relationship between financing of special education and inclusion of pupils with special needs in Europe. It is important to begin by clarifying the two key concepts used here: *special education* and *inclusion*. In some countries the concept of special education refers to a separate special education system. In others, the term special education *refers to all forms of special support and teaching* within separate and mainstream education. It is this latter interpretation that is used in this report since it represents best the development in most countries. Where the term special education is used, it should be seen within this broader context and definition of the term.

The concept and practice of integration can be interpreted as developing more and more into the concept “inclusion”. The view held here is that the term *inclusion has wider meaning* and application than the term integration. Inclusive education refers to educational reform that - amongst other aspects - prevents the segregation of pupils with special educational needs by modifying the curriculum. This study essentially focuses upon the concept of inclusion and how financing policies and practices influence it. In the discussion sections of this report (this chapter and then 4 and 5) the term inclusion is used in line with the definition given here. In chapter 3 - country descriptions - it has been necessary to follow and apply the terms and concepts used by the countries themselves (i.e integration and inclusion) independent of the differing definitions or connotations.

Most countries hold the view that pupils with special educational needs should be educated in the mainstream system. Research shows that countries differ in their provision for pupils with special educational needs. Major differences have

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been described not only in quantitative terms, but also in terms of educational organisation and the actual provisions for pupils with special educational needs within mainstream education. Recently, the focus has been placed upon a major factor in realising inclusion: educational funding. More specifically, a strong link is assumed between funding of special needs education and the provision developed and implemented in different education systems.

Several researchers now subscribe to the view that the funding system of special needs education can be held - at least in part - responsible for the kind of provision made available (Danielson & Bellamy, 1989; Dempsey & Fuchs, 1993; Parrish, 1994). Arguing that funding has an impact upon inclusion is one thing - demonstrating and explaining the intricacy of this connection is a different matter altogether. Being able to predict what effects a particular funding model (or even change of that model) will have on inclusion is simply not possible at this time. As yet, little is known about particular monetary arrangements and their educational consequences.

In describing funding systems and in analysing the relationship between funding and inclusion different angles can be used. In the first instance, **how the funding of special needs education is organised** must be clearly identified. This should include funding mainstream schools for special needs provision and the funding of special arrangements such as special classes, special schools and so forth.

In addition, the **decision-making processes** concerning funding of special needs education must be analysed. Before funds are available for schools, a number of decisions will have been made. The different stages through which the funds are transferred to schools should be described as well as the decision-making processes at the different stages before the funds reach schools.

Attention must be paid to **how finances are used** within the school. It is important to know to what degree schools (mainstream and special) are free to use special needs funds for different goals (materials, methods, specialists, additional teachers and so on).

One of the most important questions is of course **whether the finances are used effectively**. Effectiveness is essentially related to the issue of outputs - whether inclusion targets are achieved. Here the main questions are: Does the funding system influence inclusion positively or negatively? Does the funding system facilitate a policy for inclusion, or act against it?

Next to effectiveness it is important to know that special needs education funds reach target groups (pupils with special educational needs) without unnecessary bureaucracy and that the most economic means are being used to reach targets. It



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needs to be established if significant parts of the budget are being spent on procedures (diagnosis/litigation and so on) rather than on the education of pupils with special educational needs. This issue can be identified as **the efficiency of the funding** - the main difference with effectiveness being that efficiency is cost and not necessarily output focussed.

Furthermore, it is well established that people and organisations sometimes use funds in accordance with their own goals. There are different kinds of **strategic behaviour** that may be the result of the funding system. Different actors may show different kinds of strategic behaviour. Situations can be envisaged where schools may use the funding system to the advantage of the organisation, which may not be in line with the formal policy goals. Similarly, parents may also demonstrate strategic behaviour that is not in line with the policy.

An important question is whether schools have to report to other bodies how funds for special needs education are spent and with what results. What is the role of inspection? How are parents informed about special needs provision in schools and the results that are achieved? This issue is generally referred to as the **accountability issue**.

The topics and specific issues described above form the basis of the study questionnaire and the subsequent analysis of information. For a full overview of the items that is used in the questionnaire that forms the basis for this study, please refer to appendix A.

## **2.4 Sample and analysis**

The study sample consists of the following countries participating in the project:

**Austria**

**Belgium**

**Flemish Community**

**French Community**

**Denmark**

**England and Wales**

**Finland**

**France**

**Germany**

**Greece**

**Iceland**

**Ireland**

**Italy**

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**Luxembourg**  
**The Netherlands**  
**Norway**  
**Portugal**  
**Spain**  
**Sweden**

These countries are members of the European Agency for Development in Special Needs Education. Of the current Member States of the European Union, all Agency member countries participated, plus Norway and Iceland.

In relation to the sample, it should be noted that this study report will show separate descriptions of the situation within **Belgium**: both the **Flemish** and the **French** Community submitted country reports. Finally, the data from the United Kingdom is restricted to a report of the situation in **England and Wales** only.

A full list of the Working Partners and country representatives of the Agency member countries is given in Appendix B.

The method of analysis used in the study was relatively straightforward: the country reports were analysed systematically in order to identify comparable information relating to the topics as described above. Some reports were very detailed, others fairly global so, for some countries additional information was needed.

Short (two-three page) country descriptions were prepared detailing the topics of the questionnaire. This procedure permits two different forms of data presentation: descriptions per country and descriptions per topic. This matrix-type approach, or model, forms the basis of the presentation of results in the next chapters.

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# 3 Country descriptions

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## 3.1 Introduction

In this chapter, the focus will be on the findings concerning provision for pupils with special needs in Europe and on the funding of special needs education. The approach taken here is country-oriented and the information is presented in the same ordered way. For each country, first the general inclusion/integration policy is described, including the most important legislative information. Then, the current situation concerning definitions of special educational needs (categories) and assessment is discussed. Provision for pupils with special educational needs in each country is described as well as the numbers of pupils with special educational needs.

For this first part of the country descriptions, data from the European Agency report **Provision for Pupils with Special Educational Needs: Trends in 14 European Countries** (Meijer, 1998) was used. As was needed, the Agency Working Partners updated the information that was presented in that report. Furthermore, three countries were added: **Luxembourg, Iceland and Ireland**. These three countries were not included in the “Provision” report.

In the second part of each country section, the financing of special needs education is dealt with. Again findings are presented in the same systematic way. First, the general situation of financing of special needs education is described. Then the decision-making processes concerning funding of special needs education is discussed. The use of finances within schools are dealt with as well as issues such as effectiveness, efficiency, strategic behaviour and accountability.

In the next chapter (4) specific attention is paid to a number of central themes concerning the inclusion of pupils with special needs and financing of special needs education.

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## 3.2 Austria

### 3.2.1 Special education

#### *Inclusion/Integration policy*

According to Austrian law, the task of special schools is to provide pupils with special educational needs with special education with reference to their disabilities and needs and to impart education contents to them equivalent to the curricula of primary schools, general secondary schools and pre-vocational schools as far as possible. The claim for such an individual and differentiated education implies the establishment of different types of special schools within the compulsory school system and different curricula as far as is necessary.

Different categories of disabilities correspond with different types of special schools. The structure of special schools shows some differences to mainstream education. The groups are smaller, 8 to 15 pupils at the most instead of 30. Teachers have followed specialised training and hold specialist qualifications. Special schools have an autonomous curriculum that may be modified with reference to the special educational needs of the pupils.

Since 1981, there have been pilot projects to test different forms of integration and to gain experience with the aim of legalising integration within the mainstream school system. In 1993, the parliament passed the respective law making integration possible in primary schools. Parallel to the legalisation of integration within primary schools, the lower level of secondary schools were offered pilot-projects to test and gain experience with integration. The aim was the legalisation of integration in secondary schools before the deadline of 1997 to guarantee the continuity of integration in secondary schools for pupils with special educational needs that started in mainstream primary schools in 1993.

In December 1996, the parliament passed the respective law legalising the continuation of integration within the lower level of secondary schools. The deadline of 1997 raised some problems however. The experimental stage was too short and the number of schools offering pilot projects was too small. In secondary schools, the co-operation between mainstream school teachers and support teachers is more complex than in primary education. The different subject matters are taught by different teachers, so the support teacher has to co-operate and plan lessons with several mainstream teachers.

Before 1993, special schools had been obligatory for pupils with certified special educational needs. Since the law of 1993, parents are allowed to choose



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between a mainstream primary school (integration) and a special school. Pupils with special educational needs can attend lessons in mainstream schools, or in 18 special schools. Integration policy differs in the Austrian provinces, although it is based on a law that is valid for all of Austria. The law demands attractive offers in both mainstream and special schools, making a choice by the parents possible. However, this demanded attractiveness depends upon the local situation, the deep-rooted infrastructure and the attitude of decision-makers towards integration.

### ***Definitions of special educational needs/disability***

Austria distinguishes 10 categories of special educational needs:

- pupils with learning difficulties
- physically disabled pupils
- pupils with speech impairments
- pupils with hearing impairments
- deaf pupils
- visually impaired pupils
- blind pupils
- pupils with serious behavioural problems
- severely and multiply disabled pupils
- pupils with health impairments

### ***Assessment***

As previously mentioned, prior to 1993 special schools had been obligatory for pupils with certified special educational needs. The entrance of a pupil into a special school was preceded by a decision of the district school board, either at the request of parents or at the request of the head of the school. Before taking such a decision, the district board had to obtain the expert opinion of the head of the special school and, if necessary, of a school doctor and a school psychologist (only with the consent of the parents). An appeal against the decision of the district school board could be made at the provincial school board. This provincial school board could also order the submission of a psycho-pedagogical opinion.

As of 1993, this procedure is still in operation, but with a few modifications. The most important modification is the legal possibility of parents to choose either a special school or a mainstream school for their child with special educational needs. Other modifications are that parents have the possibility to present expert opinions themselves and that the district school board has to counsel the parents

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regarding their child's special educational needs, the possibilities within the school system and additional aids.

### ***Provision for pupils with special educational needs***

Austria has eight types of special schools:

- special schools for pupils with learning difficulties
- special schools for physically disabled pupils
- special schools for pupils with speech impairments
- special schools for hearing impaired and deaf pupils:  
education for these pupils was organised in two different types of special schools, but these two types are integrated into one for both disabilities
- special schools for visually impaired or blind pupils:  
education for these pupils was organised in two different types of special schools, but these two types are integrated into one for both disabilities
- special schools for pupils with serious behavioural problems
- special schools for severely and multiply disabled pupils
- special schools in hospitals

A number of special schools (n = 205) are designated by the provincial school board as Centres of Special Education which have the task of providing and co-ordinating measures in the field of special education. This makes it possible that pupils in need of special education can also be taught in mainstream schools in the best possible way. The Centres of Special Education co-operate with school inspectors, other centres and institutions and compulsory schools in the area. The Centres provide and co-ordinate measures in the field of special needs education in compulsory schools including the collection of data concerning pupils with special educational needs, giving pedagogical and organisational advice, counselling parents and teachers, taking care of public relations, providing training opportunities and establishing and taking responsibility for mainstream classes with integration.

Different staff are available for pupils with special educational needs: teachers that are qualified for special needs education work in special schools; additional staff for pupils with special educational needs and teachers who act as support for the classroom teacher in mainstream schools. Medical staff, therapists and nursing staff are employed wherever there is a need.

The integration of pupils with special educational needs can take different forms:

### 1. Mainstream class with full-time support

In general, these classes consist of four to six disabled pupils (depending upon the category and the degree of disability) and 17 to 20 non-disabled pupils. The class teacher is supported by a special teacher full time. The structure of this class is planned and decided by the district school board in co-operation with the head of the Centre of Special Education and the head of the school.

### 2. Mainstream classes with part-time support

In such classes the number of disabled pupils is not enough to justify full-time support and the classroom teacher is supported part-time. The degree of this support depends on the number of disabled pupils, the category and the degree of disability and the local situation. The experience is that it is very difficult to integrate just one pupil with special educational needs in a class because the teacher is supported by a special teacher on an average of four lessons a week. In this case, the success of integration depends upon the skills of mainstream teachers. The question is whether this form of integration is able to meet all educational needs of pupils with special needs.

### 3. Co-operation classes

Co-operation classes are situated within a mainstream school or at least in the same building. These classes have the structure of a special class and pupils are taught by a special teacher. The law offers these pupils the possibility to attend lessons in the mainstream class, when they are able to follow the mainstream curriculum. In practice most of these pupils follow parts of the curriculum in the mainstream class. The problem, however, is that these pupils are constantly moving class location without “feeling at home” anywhere.

Long before integration in mainstream schools was introduced, special schools provided mainstream schools with specialists in a special visiting service offering provision for pupils with special educational needs within or outside of the classroom. This special visiting service is still available.

### ***Number of pupils with special educational needs***

In Austria, about 685,000 pupils in the compulsory age range attended in 1997/1998 attended mainstream and special education:

total number pupils primary schools	387,488
total number pupils in secondary schools	261,587
total number in special schools	16,610 (2.5%)
total number of pupils registered with SEN	25,642 (3.70%)

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*Pupils with special educational needs in special schools (1997/98)*

(Source: **Bundesministerium für Unterricht und Kulturelle Angelegenheiten, Abt Präs.1 (36)**, Österreichische Schulstatistik, Vienna, 1998).

total number 16,610 (= 2.5% of the total school population) of which in:

schools for learning disabilities	58.0%
schools for physically disabled	5.4%
schools for speech impaired	2.5%
schools for hearing impaired	1.7%
schools for deaf	1.4%
schools for visually impaired	1.0%
schools for blind	0.5%
schools for multiply disabled	1.7%
schools for severely disabled	19.0%
schools in hospitals	4.4%
schools for behaviorually disturbed	3.6%

Most pupils with special educational needs follow special education at the secondary school level (60%).

*Pupils with special educational needs in mainstream schools:*

N = 9,032 (1.4% of total school population) of which in

primary schools	5,475 (1.4%)
secondary schools	3,557 (1.4%)

There are no statistics available regarding the number and types of integration arrangements. In rural areas, mainstream classes with part-time support are predominant in relation to mainstream classes with full-time support as it is difficult to create a concentration of pupils with special educational needs. The statistics concerning pupils with special educational needs integrated into mainstream secondary education are mainly based on the pilot-projects, but also on a one year period of observation since the new law for integration at the secondary level has been implemented.

### 3.2.2 Financing

#### *General situation*

Communities and community associations maintain most schools of general compulsory education. The provinces maintain vocational schools. Maintaining and operating a school includes its establishment, upkeep and repairs to the building, payment of overheads, procurement of equipment and teaching aids and the employment of the necessary auxiliary staff.

Employment of teachers in compulsory schools is exclusively the responsibility of the respective provinces. The provinces are fully compensated for these costs by the federal government in the process of fiscal equalisation. The calculation of the budget is above all based on the number of pupils, being supplemented by a few factors such as the local situation and the participation of pupils whose mother tongue is not German. The provinces decide on the employment of teachers; the schools do not have any say in this process.

#### *Financing of special needs education*

The employment of special teachers in special needs education is the responsibility of the respective province - the community is responsible for the maintenance of both mainstream schools and special schools. The calculation of the budget for special needs education is based upon the number of pupils and their various special needs. The budget consists of two components, being calculated in a different way for different purposes:

#### **(i) Funds for pupils with certified special needs**

A pupil with certified special needs attracts the funds to pay the teachers meeting his/her needs. It does not make a difference if the teachers meet these special needs in a special school or in a mainstream school. The pupil takes the funds to the particular school his or her parents have chosen for him or her. The funds are allocated to the district school board so the board can react to the different needs and the local situation.

Calculation: 3.95 pupils with certified special needs leads to the employment of one teacher (23 hours of special needs education weekly).

#### **(ii) Funds for pupils in compulsory schools with various non-certified disabilities**

The calculation is based on the experience that a certain fixed percentage of pupils

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have various non-certified disabilities needing special education in the form of visiting teacher input.

Calculation: 213 pupils in primary schools leads to the employment of 1 teacher (23 hours of special needs education weekly). This number will be reduced within the next four years: from 213 then 202 and 193 to 184.

### *Decision making processes concerning funding of special education*

The district school board (district school inspector) makes the necessary (pedagogical) decisions, e.g. concerning the amount of funds with reference to the category and degree of special needs and the local situation, before funds are available for schools in co-operation with the centre of special education. According to these decisions the province allocates the funds to the school within the legal frame. Modification of the internal proceedings may differ in the federal provinces on grounds of autonomy.

The pedagogical decision regarding the allocation of funds is based on experts' opinions, information from the centre of special education and information from the school concerned. In general, the district school inspector establishes an advisory board in co-operation with the centre of special education. The restrictions placed upon the allocation of funds relate to the number of pupils with special educational needs, the category and degree of the needs, the structure of mainstream classes and the local situation. The district school inspector can decide autonomously, but he or she is responsible to the provincial school board.

Due to the autonomy of the federal provinces, there are differences in the decision-making processes within the legal framework.

### *Recent developments*

Since 1993, the number of pupils with special needs has increased considerably. The most obvious reason for this is the connection between the assessment procedure and the funding system. Sometimes, pupils that do not have special educational needs in the sense of the law do receive financial support. As the total budget is limited, this increased demand will diminish the support for pupils with real special needs. Therefore an alternative financing method is now on the agenda.

The calculation will be based upon the total number of pupils and the fixed percentage of pupils with certified special needs. An important reason for changing the funding system lies in the integration policy. It is supposed that the new funding system would help to avoid putting a label on the pupil with special needs and



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would offer the possibility to make funds available for prevention.

### *Decision making processes concerning funding of special education*

There are funds that are allocated to the schools, which are earmarked for special education. In general, there are three sources of these funds:

- the province: employing teachers
- the community: maintaining the school
- the social department: employing nursery staff and therapists

The head teacher has to budget for the particular requirements within the school. As for the staff, the school is provided with persons, not with financial funds. The school does receive financial funds for maintaining and operating the school concerning procurement of equipment and teaching aids, but in general not for the establishment of the school, upkeep, repair and employment of auxiliary staff. As the budgets are earmarked, the decisions and allocations must be compatible with the granted funds.

### *Effectiveness, efficiency and strategic behaviour*

#### *Effectiveness*

There has not been any evaluation of the relationship between the type of funding and integration. However, it is felt that past experience shows that under present conditions, not every form of special needs education in mainstream schools is effective enough to meet the special needs of the pupil entirely. It is felt that integration is not cost-neutral and that these costs will rise.

#### *Efficiency*

As the funds for special needs education are allocated on the basis of a clear connection between certified special educational needs and the resources, the funds reach the target groups without lots of bureaucracy. It is felt that there are no significant parts of the budget spent on procedures such as diagnosis and assessment - these costs fall within other budgets.

#### *Strategic behaviour*

A negative effect of the current funding system is the increasing number of pupils with special needs. As previously pointed out, the most obvious reason for this is the connection between the assessment procedure and the funding system. At times pupils that do not have special educational needs in the sense of the law

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do receive financial support and this has negative effects upon the available budget for other pupils with certified special educational needs. Furthermore, it is felt that parents of pupils with special educational needs generally demand more funds for special education.

### *Accountability*

In general, schools do not have to report how funds for special needs education are spent as the funds are earmarked. However, schools do have to report upon the results.

The head teacher is responsible for the operating conditions of the school. He or she is responsible to the province, the community, the social department and to the different school boards. The Inspectorate supervises, counsels and supports the schools.

Parents are informed about the special needs provision available in the school during the assessment procedure. The teachers and the head teacher of the school inform parents about the results of special needs education during school time.



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### **3.3 Belgium**

#### **3.3.1 Flemish Community**

##### **3.3.1.1 Special education**

###### ***Inclusion/Integration policy***

Flanders has a long history of a separated system of special schools. Since 1970, legislation for mainstream and special needs education has been separate. The legal principle of integration, however, was included in the 1970 law on special and integrated education.

The recent law of February 1997 on primary education, incorporates mainstream and special primary education in the same legal framework, respecting the specific characteristics of special education. The principle of integration is further specified in the law. Mainstream primary schools should provide pupils with an uninterrupted learning process and are responsible for the education of all pupils of the intended age group, guiding as many pupils as possible by continuous attention and support. Special primary education is described as education that offers adapted education, care and therapy to pupils whose personal development cannot be ensured by mainstream education on a temporary or permanent basis. The balance between the possibilities of the mainstream school and the educational needs of the pupil justifies a referral to special education.

As stated, the new law also describes integrated primary education. Integrated primary education is a collaborative link between mainstream and special primary education. It is the intention to enable pupils with a disability and/or learning or educational difficulties to participate in courses and activities in a mainstream school, temporarily or permanently, completely or partially with help from a special school that receives additional resources in order to do so.

Finally, the law creates possibilities for schools to work together by exchanging teacher hours.

Secondary education still has separate legislation for mainstream and special education.

Although there is a clear discussion about integration, inclusion and co-operation between mainstream and special schools at the level of educational advisory councils and schools, Flanders still has many special schools that function separately from mainstream schools.

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Integrated education started on an experimental basis in 1980. In 1983, it was officially organised for pupils with physical, visual or hearing impairments that had a good chance of success in mainstream education provided that they received some additional educational and/or paramedical support. With the circular of 1994, the integration policy permitted the following innovations:

- an extension to all types of special education. In addition, pupils with learning and behaviour problems can profit from integration support when they return from a special to a mainstream school
- different forms of integrated education: not only full-time, but also temporary and partial integration is possible
- extension to the level of higher education
- the acceptance of the “equivalence principle” - pupils with special educational needs can graduate from a different programme by replacing lessons approved by the inspector
- the differentiation of the nature and amount of additional aid depending upon the nature and seriousness of the pupil’s disability

In July 1996, research findings concerning integrated education were made public. An important result was that special needs education teachers spent a lot of time helping pupils with the subject matter and far less attention was paid to helping the mainstream teacher in dealing with pupils with special educational needs. The report also showed that there was too little attention being paid to the socio-emotional aspects of integration. Furthermore, the study highlighted a need for a different system of financing based upon the specific needs of pupils, the need for more facilities for consultation and support and a need for in-service training.

In general, integration is still seen as extra support for pupils who have the capacity to meet the normal expectations of the mainstream school. For pupils with a moderate or severe disability, e.g. pupils with learning difficulties, integration is still very difficult in practice.

As of the school year 1993/94, the Flemish Minister of Education established a programme to intensify provision in mainstream nursery and primary schools. This centres upon an increase in the attention paid by schools to differences amongst pupils with regard to learning possibilities and learning aspirations in terms of aptitude, background, age and gender. The aim is to achieve a better approach to learning problems and a reduction of the number of pupils who repeat a year.



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The priorities of the project are:

- introduction or optimising a pupil monitoring system
- optimising the working methods in the classroom
- optimising co-operation in the school
- optimising co-operation with parents
- co-operation with the guidance centre
- co-operation with a special school (voluntary, but with the possibility to exchange teacher hours from the mainstream to the special school to get weekly support)
- an engagement to ask for guidance and in-service training

The ultimate goal is the enhancement of the competence of classroom teachers in dealing with pupils with special educational needs. The project is based on conditional financing, schools receive additional resources on the basis of a clear project approach for the target group. In addition to this project, five experimental projects have been set up concerning the co-operation between one special school and at least four mainstream schools. In addition to these official initiatives, some mainstream and special schools have themselves initiated different methods of co-operation and collaboration.

Recent developments illustrate a genuine concern to provide a system of mainstream education that is more appropriate to meet the real diversity among pupils. This applies to pupils with disabilities as well as pupils with other special needs e.g. pupils from immigrant, refugee or underprivileged families and so on.

A recent debate has been organised within the Flemish Education Council on “Inclusive education” and a document accepted on July 7th 1998. The aim is to raise awareness on the process of school improvement in order to provide quality education for all pupils. Although the concept of inclusive education is adopted, there is still a long way to go.

### ***Definitions of special educational needs/disability***

The special needs education system is meant for pupils and young people who need special education because of their pedagogical needs and requirements. Both the new integrated law for primary education and the old separate law for secondary special needs education divide special education into eight types or pedagogical settings.

Each type is characterised by its own target objective, didactic content, teaching methods and organisation and is adapted to the specific educational needs of the

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pupils for whom it is intended.

This principle was already present in the 1970 Act on special needs education and constituted a break with the philosophy underlying the provisions made by other ministries dealing with disabled people. The law focused on the needs of the pupil rather than on his/her disability. It emphasised an educational instead of a medical or therapeutic approach. Unfortunately, it proved very difficult to find a satisfactory operational definition of the concept of need. Therefore there is still confusion between the concept of educational type (referring to an organisation of teaching) and the concept of disability (referring to the evaluation of the deficits presented by the pupil) in defining the types of special education.

At the present time there is a proposal for research to be carried out in order to evaluate the 8 categories and to explore the possibility of framing definitions in terms of special educational needs. The current types of special education are:

- Type 1: is intended for pupils with a mild learning difficulty. This type is not organised at the level of the nursery school
- Type 2: is intended for pupils with a moderate or severe learning difficulty
- Type 3: is intended for pupils with severe emotional and/or behavioural problems
- Type 4: is intended for pupils with a physical disability
- Type 5: is intended for pupils with severe health problems or long term illness
- Type 6: is intended for pupils with a visual impairment
- Type 7: is intended for pupils with a hearing problem
- Type 8: is intended for pupils with severe learning problems that cannot be explained by an intellectual disability. This type is not organised at the nursery and secondary school level

Regardless of the types of special education, secondary education is divided into four educational tracks that differ mainly in the aims of education. The first track, known as “social adaptation”, aims at contributing to an active and worthwhile life for those who are unable to take part in active work life even in a sheltered workshop, because of the seriousness of their disability. Pupils are taught to live as independently as possible in a sheltered living environment (e.g. a day-centre or an activity centre). This track can be organised for types of special education 2, 3, 4, 6 and 7, and lasts for at least four years.

Track two, known as “social and vocational adaptation”, can be organised for the same types of special education. In addition to general and social learning, it



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also provides work training in order to enable pupils to integrate into a sheltered/protected work environment. The training lasts for at least four years and is divided in two phases. Vocational training courses outside the school are also organised.

Track three, known as “vocational training”, provides pupils with general and social training plus vocational training. It can be organised for types of special education 1, 3, 4, 6 and 7. The pupils are prepared for integration into a normal employment and living environment. The training is comparable with standard vocational education and lasts five years.

Track four, known as “transition or qualification training”, provides secondary education similar to the general, technical, vocational, or an artistic curriculum of mainstream full-time secondary education and is also structured in the same way. The pupils follow the programme of mainstream education under the condition that the educational methods are provided which are adapted to their special educational needs or that the time to acquire the programme can be extended as required.

### ***Assessment***

In principle, special needs education is only considered for pupils whose needs are insufficiently catered for by the education resources that are available within the mainstream school. The new legal definition of special needs education (Decree 1997) is based on a concept of special needs. Special needs education is defined as education, based on a pedagogical project, that provides adapted schooling, care and therapy for pupils whose general personal development cannot be or can insufficiently be guaranteed, temporarily or permanently, in a mainstream school. The main reason for referral to special needs education is not the pupil’s problem alone, but is also related to the difficulties or incapacity of the mainstream school to provide for the optimal development of all pupils. Referral has to do with the balance between the educational possibilities within a mainstream school and the educational needs of an individual pupil.

To be enrolled in a special school, two documents from a guidance centre (a psycho-medical-social centre) are needed. The first document is a certificate stating that the pupil may benefit from special education, indicating the type, the level, and if appropriate the form of special secondary education the pupil needs. The second document justifies this certificate, and contains a synthesis of the psychological, medical, social, and pedagogical examination. This multidisciplinary report must conclude that a pupil has a real need to attend a

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special school.

The guidance centre plays mainly an advisory role. The parents receive the certificate, which allows, not forces, them to enrol their child in a special school of their choice, which organises the specific type of special education, the child needs. Special needs education is a right, never an obligation. The certificate is returned to the parents when their child leaves the school.

A copy of the report is sent to the school. This report, together with the findings of the school team itself, allows the school team to direct the pupil towards the most suitable group, to set the objectives to be attained and to work out an individual educational plan corresponding to the pupil's needs with the help of the guidance centre. In specific cases, a supplementary advice can be asked from the Consultative Commission for Special Education.

Admission to integrated education requires a certificate of acceptance, just as admission to special education. This certificate refers to an "integration plan". This integration plan is the result of consultation among all parties involved: the pupil or his or her parents, the mainstream school, the school for special education and the counselling centres.

### ***Provision for pupils with special educational needs***

Special education services are organised in three different forms: full-time special education, integrated special needs education and special needs education at home.

**Full-time special needs education** is organised at three levels. In total, Flanders has 93 special nursery schools, 198 special primary schools, and 115 special secondary schools. The special schools are categorised according to the different types of special educational needs as described before. In Flanders there are no part-time or full-time special classes. In order to promote integration in mainstream schools, type 1 (mild learning difficulties) is not organised at pre-primary level and type 8 (severe learning problems) is not organised at either pre-primary or secondary level. Special needs education can be followed from the ages of 2 to 6 until 21 and in some cases even longer.

Within the framework of **integrated education**, as a form of co-operation between mainstream and special schools, teachers and other professionals of the special school give additional support to pupils with special educational needs in a mainstream school. In the school year 1996/97, 848 mainstream primary and secondary schools were involved and 88 special primary and secondary schools. The nature and amount of support depends on the type of special needs and the



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degree of disability. Support can be permanent or temporary. When the pupil's disability is moderate or mild, support is meant to be temporary, extending to no more than two years per school level. Only for severe disabilities (deafness or blindness) can assistance be permanent. Limited support over one school year is provided for pupils with specific learning or behavioural problems that return to a mainstream school after a stay of at least one-year in a special school.

Disabled pupils who, because of their disability, are permanently unable to attend a school, have right to permanent **education at home**, for four hours a week. The home education is provided by a special school in the nearby environment of the home.

Special educational provision **in mainstream schools** consists, besides integrated education as described above, of remedial teachers and additional teaching hours in the framework of the project that is focussed on enhancing the care for pupils with special educational needs within mainstream nursery and primary schools (see above). Exchange of these additional teaching hours with special schools in order to bring in expertise, is possible. In the school year 1996/97, 553 nursery schools (26.3% of all schools) and 673 (30.8%) primary schools participated in the project.

Pupils with a disability in mainstream schools also have access to special learning aids such as technical tools, translation of study books (into Braille for example) and other materials. The head teacher of the mainstream school must apply for these materials. A commission decides upon allocations.

In some cases schools have access to external therapeutic services (e.g. rehabilitation centres) which provide help within school time.

Finally, a network of Centres for pupil guidance, CLBs (the present psycho-medical-social centres), provides psychological, pedagogical, social and medical guidance to pupils enrolled in pre-primary, primary and secondary schools. The new CLB centres will be concerned with learning problems, social/emotional problems, school and career guidance and medical follow-up of all pupils. It is clearly stated that pupils with special educational needs are a priority. In all of these domains they are required to focus on prevention, development, remedial care and support for school-staff. Intervention may be direct to the pupil and/or indirect focusing upon the educational environment, especially teachers and parents.

### ***Number of pupils with special educational needs***

Currently in Flanders, 3.9% of all pupils in the compulsory age range are registered as having special educational needs. In the last years the percentage of

pupils in separate special schools grew steadily. In 1985, the percentage was below 3% and in 1990 about 3%. Of the 3.9% that are now registered as pupils with special educational needs, 3.8% are placed in separate special needs education settings and 0.1% are integrated in mainstream schools (1997/98). On the level of the nursery school the percentage of pupils in separate special schools is about 0.8%, on the primary level 5.7% and on the secondary level 3.6%. Furthermore these percentages vary according to age group. For example, more than 6% of the 11-years-old are educated in special schools.

The numbers of pupils in special schools (1997/98) are given in the table below.

	nursery school	primary school	secondary school
mild learning difficulties	-	10,132	10,237
moderate/severe learning difficulties	1,038	2,614	3,081
severe emotional/behavioural problems	165	1,156	919
physical disabilities	271	687	930
severe health problems or illness	164	242	161
visual impairments	49	134	247
hearing problems	288	365	233
severe learning disabilities	-	8,984	-
total	1,975	24,314	15,808
number of pupils in mainstream schools	245,704	400,038	426,220

The following table presents the numbers of pupils registered with special educational needs that are integrated in mainstream schools (1997/98).

	nursery school	primary school	secondary school
mild learning difficulties	-	-	-
moderate/severe learning difficulties	9	-	-
severe emotional/behavioural problems	-	8	49
physical disabilities	188	166	96
severe health problems or illness	-	-	-
visual impairments	59	102	87
hearing problems	50	97	140
severe learning disabilities	-	131	-
total	306	504	372



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In higher, non-academic education 20 students with special educational needs are integrated (6 with a physical disability, 11 with a visual disability and 3 with a hearing problem).

The numbers given are only related to those pupils who are eligible for additional resources. The total number of integrated pupils with special educational needs is higher due to several reasons, e.g. the fact that pupils with mild or moderate problems only get support for a limited period of time. Once the support stops, the pupil with special educational needs is no longer registered.

Finally, it needs to be noted that only a very small number of disabled pupils (less than 0.1%) cannot be enrolled in a school environment. They have access to residential or day care services supported by the welfare department.

### **3.3.1.2 Financing**

#### *General situation*

The Flemish government finances both mainstream education and special education. The government provides funding for staffing (a number of capital periods for teachers and other personnel) and for a working budget (money). The general principle of funding schools for staffing as well as for the working budget is based upon the number of pupils enrolled in the school on a particular date. The working budget and the capital of teacher periods are put at the disposal of the school board. The school board has a lot of freedom in using these resources. There are no regional differences in this procedure.

#### *Financing of special needs education*

The funding system for special needs education can be divided into the respective financing for special primary and secondary schools, integrated education and the project for special needs education in mainstream schools (“education priority policy and extending care”).

The major part of the resources for special needs education is made available within a separate system of **special education**. For each of the 8 types of special needs education and the four educational forms in special secondary education, the number of teaching hours, the amount of hours for support personnel (therapists, nurses, pedagogical, psychological and social staff) and the working budget are calculated based on specific standards. Each type and educational form has its own coefficient for the conversion of the number of pupils into a certain amount of capital periods. The co-efficient is most favourable for pupils with a

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visual or hearing impairment.

In addition, transport between home and school is free of charge for those pupils who attend the nearest special school where the type or educational form the pupil needs is organised.

Within primary education, a pupil in a mainstream school costs 98,140 Belgium francs and a pupil in a special school 315,482 francs (1997/98). In secondary education, a pupil in a mainstream school costs 229,356 francs and a pupil in a special school 469,919 francs (1997/98).

Since the 1980s **integrated education** (GON) has been possible. Pupils with special needs go to a mainstream school with the support of a teacher and/or therapists of a special school. The special school receives extra teaching hours and extra hours for support personnel based on the number of pupils with special needs that are supported in mainstream schools. The number of pupils is calculated each school year on September 30th. The teachers and therapists that provide support in the mainstream schools receive the extra hours. The amount and type of additional resources are determined on the basis of the nature and gravity of the special need. The resources are connected with the individual pupil, so schools have little possibilities to use the resources flexibly. A second parameter in the determination of additional resources is the character of the integration. Only full-time and permanent integration leads to substantial additional resources. However, pupils with special educational needs that are integrated into mainstream schools only attract a very small amount of additional resources compared with what they would cost within special education.

The Flemish government also pays for the technical equipment and adapted school materials that disabled pupils in mainstream schools may need.

The systems of funding as described until now are open-ended. More and more the government is introducing, on an experimental basis, forms of conditional financing. This is the case in recent programmes in mainstream education concerning the educational priority policy (for immigrant youngsters) and the policy of **extending care** that aims at the problems of those who are falling behind in their education (underprivileged nationals). These projects for special needs education in mainstream schools are meant for specific target groups. The government wants to encourage schools to increase their attention to differences between pupils.

The financing is conditional as schools can only receive additional teaching hours when a substantial number of pupils belonging to the target group is present in the school and the school develops a clear project approach laid down in a plan



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of action. The target group for extending special needs provisions is deduced from several social characteristics (centred upon the family and work situation).

### *Decision making processes concerning funding of special education*

The new CLB-centre or another acknowledged service decides on the admittance of pupils into special education. Parents receive a certificate that is based on a multidisciplinary research on the needs of their child. This certificate declares what type of special needs education fits the pupil's needs, and is needed for the enrolment in a special school. The enrolment in a special school automatically makes resources available. The same procedure applies to the admittance to integrated education (GON). All parties involved develop an integration plan together that is based on a GON-certificate.

For projects within the policy of extending special needs provision in mainstream schools and the educational priority policy, the following procedure is followed: the school supplies information about the presence of the target group and the plan of action related to the project priorities determined by the government in a yearly application. The administration checks whether the application meets the requirements. After this, a committee of members of the administration, the Education Inspectorate and external experts evaluate the applications and grants extra teaching hours based on the size of the target group, the quality of the proposed plan of action, the evaluation by the inspectorate of the use of extra teaching hours in the previous year, the available budget and the number of pupils in the school. The extra teaching hours are earmarked.

Schools have relative autonomy in the use of teaching hours and hours for non-teaching personnel within the educational legislation. Schools have more autonomy with respect to the contents of education. Additional resources and the mainstream budget are separate and have to be used for the particular goals and target groups. Schools experience this lack of coherence as a problem. Attempts have been made to join the budgets for the educational priority policy and the project of extending special needs provision.

### *Effectiveness, efficiency and strategic behaviour*

There has not been any research concerning the relationship between the funding system and integration. However, the growth of special needs education is seen as an important problem that is influenced by the open ended system of financing and the fact that the costs of a pupil in special education is three times higher than the costs of a pupil in mainstream education. Thus, the financing

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system stimulates segregation of pupils with special needs. Referral is rewarded financially.

The fact that provisions for special needs education are mainly provided in a separate system of special schools, limits the freedom of parents to make a responsible choice about the kind of schooling which they see as most appropriate for their child with special educational needs.

The project of extending special needs provision in mainstream schools strives towards changing mainstream schools so pupils with special educational needs can be educated in them. Until now, however, the growth of special needs education continues and it is assumed that awareness of the problem grows, but that mainstream schools are not able to translate the project to the mainstream classroom.

Additional funding for mainstream schools is a necessary condition, but it is not the sole sufficient condition. Financing must be related to results.

Negative effects of the current funding system are:

- Financing individual pupils can lead to a battle for pupils
- The greater the financing for education of pupils with special educational needs within a separate setting leads to less freedom for parents to choose a mainstream school, stimulating a choice of school with the most resources in relation to the interests of their child
- There is a motive provided for teachers in mainstream schools to give no extra effort themselves

More and more parents fight for the necessary resources for the education of their child with special needs in a mainstream school

### *Accountability*

The Education Inspectorate monitors the quality of education by careful examination of every school. The use of the major part of the financial resources for special needs education in special schools is checked in this way. Every year, the Inspectorate evaluates the use of the budgets within the projects of extending special needs provision in mainstream schools and the educational priority policy in relation to the specific goals set in the plans of action.

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## **3.3.2 French Community**

### **3.3.2.1 Special education**

#### ***Inclusion/Integration policy***

In Belgium, the organisation of special needs education is similar for the French and the Flemish communities. There are eight types of special schools and the special education provision is concentrated in separate special schools. The special school provides education for pupils who cannot receive education in mainstream schools.

Since 1986, Belgium has had a law regarding integration and this law describes two integration models. The first model concerns special schools for physically disabled, blind and for deaf pupils. Pupils with these problems must be able to attend lessons in mainstream schools and obtain a certificate. Pupils stay on the roll of the mainstream school, without the label of being a pupil of a special school, but they can use the free bus that is organised for the special school. The pupils follow mainstream education full-time with four hours support per pupil from a teacher of a special school. The initiative to integrate a certain pupil may come from the team of the special school, the association that guides the pupil during school time (Psycho-medical-social centre for the special schools, or PMSS. Next to these PMSS there are also PMS for the support of mainstream schools), the parents of the child, or the pupil themselves when s/he is older than 18 years old.

The second integration model concerns all eight types of special schools. Here, pupils remain on the roll of the special school, but receive education in a mainstream school with help from the special school (psychological, educational, and/or therapeutic support). The integration can be part-time; the pupil spends part of the time in a mainstream school and the other part in a special school. The integration can also be full-time (with support of a special school), temporary, individual or collective (a group that is integrated).

The mainstream school must provide instruction adapted to the needs and possibilities of the pupil. The integration can be organised at nursery, primary and secondary school level and can also be organised between two different types of special schools. The decision is taken by the team of the school and the PMSS together with the parents and the head of the mainstream school. A protocol describes this decision and the agreement of all partners (of the special and the mainstream school), the complete integration project with all modalities and the contact between the two schools. This report is sent to the Inspectorate who is

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responsible for the assessment. Each partner can decide to stop the integration, after notifying the Inspectorate.

### ***Definitions of special educational needs/disability***

The French Community has a similar organisation structure to that of Flanders. There are eight types of special educational needs:

Type 1: is intended for pupils with mild learning difficulties

Type 2: is intended for pupils with moderate or severe learning difficulties

Type 3: is intended for pupils with severe emotional and/or behavioural problems

Type 4: is intended for pupils with physical disabilities

Type 5: is intended for pupils who have to be in a hospital or another medical institution for a longer period of time

Type 6: is intended for pupils with visual impairments

Type 7: is intended for pupils with hearing problems

Type 8: is intended for pupils with complex learning disabilities

### ***Assessment***

A child's difficulties may be first recognised by parents, the PMS centres that work with mainstream schools, the teacher, or the team of the mainstream school. As the next step, the pupil is tested in the PMS centre. The centre gives the parents advice about the most appropriate school for their child. The parents are free to choose a mainstream or a special school. When they want their child to stay in a mainstream school, the child receives no special help. When the parents decide to follow the advice of the PMS, the pupil is obliged to attend the kind of teaching the PMS considers being the most appropriate. Each special school is specialised in one or more types of special educational needs. The development of the pupil in a special school is monitored by the PMSS centre. If necessary, the team of the school and the PMSS centre can decide to change the kind of teaching. The pupil can leave the special school and return to a mainstream school every year in September. This is not part of an integration process; the child becomes a mainstream pupil again and no longer receives help of the special school.

If necessary, a pupil of six years old can stay one or two years longer in the nursery special school after a decision of the school team and the PMSS. A pupil of 12 years old can go to a secondary special school, to a mainstream secondary school, or stay in the primary special school for one or two years. The school team

and the PMSS make this decision together with the parents. The pupil can stay in a special school until the age of 21.

***Provision for pupils with special educational needs***

The French Community of Belgium has a separated system for special schools and mainstream schools. Furthermore, special support is also possible within mainstream schools. The special school supports integrated pupils with special educational needs and also the team of a mainstream school. A teacher of a special school co-ordinates the intervention of the team. This teacher supports the integrated pupils who are still on the roll of the special school and other pupils that need help. The number of professionals from special schools that work in an integration project is calculated by the special school in the usual way. However, the amount of time the teacher spends on helping the pupils is flexible.

***Number of pupils with special educational needs***

The following table contains the numbers of pupils with special educational needs across the different categories (in 1998-1999). In that year a total of almost 26,000 pupils received special needs education within a special school.

Number of pupils in special schools (1998/99)

mild learning difficulties	9,968
moderate/severe learning difficulties	4,094
serious emotional/behavioural problems	4,319
physical disabilities	1,536
hospital/medical institution	1,027
visual impairments	241
auditory problems	594
specific learning disabilities	5,476
total	27,255

In 1998/1999 the number of pupils in special needs education was 27,255. This is about 3.2% of the total population of the same age group. Within the nursery phase, the percentage was about 0.7%, within the primary phase 4.1% and within the secondary phase about 3.6%. These percentages are based upon the data presented in the table below.

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## Number of pupils in mainstream and special schools (1994/95)

	mainstream schools	special schools
nursery school	153,924	1,029
primary school	317,088	13,691
secondary school	331,174	12,535
total	802,136	27,255

### 3.3.2.2 Financing

#### *General situation*

In the French Community of Belgium, the education of a pupil is funded by the government (68%), the provinces (2%), the cities (4%), and 'des allocations familiales' of the social Ministry (26%). The largest part of the government grant is spent on mainstream education (82%); 6% is spent on special schools. The expense per pupil increases with the level of education. Between 1988 and 1993 the budget from the French Community for salaries and working costs has been increased (approximately 17%) due to the increase of the number of pupils and the costs per pupil. The number of pupils in special schools remained almost the same, but the costs per pupils increased. There are two different allocation systems, one for mainstream schools and one for special schools.

The government determines and allocates the financial budget for education according to the following steps:

1. the head teacher of the school estimates the expenditure for the next year, based on the expenses of the current year
2. the Ministry determines the budget for each school on the basis of the number of pupils and the estimates of expenditure
3. the school receives information about the amount of budget for the year and receives the budget in four periods
4. at the end of June and December, schools have to submit a financial report

The head teacher of the school is responsible for the expenses and receipts and has autonomy in using the funds according to rules. The funds of the cities and provinces are generally allocated when the head teacher of a school requests. The head teacher will then obtain the authorisation to buy what the school needs and sends the bill to the province or city.



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### *Financing of special needs education*

There exists one administrative body responsible for the financing of both mainstream and special schools. The amount of money for each special school is determined on the basis of the expected expenditure, other financial support and the future of the school (the expected number of pupils).

The Ministry pays directly the salaries of teachers, paramedical, social, and administrative personnel and the head teacher. The schools receive a budget for the salaries of the additional personnel (for example for cleaning and maintenance).

Special schools receive an additional budget for a doctor. All schools receive a budget for energy (14%), administration expenses (0.06%), maintenance of the school building (10%), and student materials (5.04%). Furthermore, there is a separate part for buying furniture and computers.

### *Effectiveness, efficiency and strategic behaviour*

Pupils with a physical or sensory disability that are integrated in a mainstream school can receive additional support from a special teacher. Other experiences with integration take place within a framework that is built and agreed upon by the mainstream and the special school, with an agreement of the Inspectorate. The two schools decide together how they arrange it financially.

The French community of Belgium has just begun the implementation of an integration policy towards pupils with special needs. It is felt that the current funding system does not seem to influence integration positively. For pupils with certain disabilities the system minimally encourages integration.

### *Accountability*

The head teacher of the school must send an overview of costs and income of the school to the Ministry. Furthermore, all partners meet at the school twice a year for consultation and for the confirmation of the activities of the school. That happens at all schools at all levels.

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## 3.4 Denmark

### 3.4.1 Special education

#### ***Inclusion/Integration policy***

In August 1994, a new act on the “Folkeskole” (primary and lower secondary schools) came into force. This act is the third and final stage in an extensive reform of both the government and the content of the “Folkeskole”. The crucial innovation is in the organisation of the teaching content and in the improvement of the methods used for the evaluation of the benefit and the effect of teaching for and upon pupils. Another innovation is the provision that teaching individual subjects shall interact with teaching interdisciplinary topics and problems. The comprehensive concept enables pupils to remain in the same group with the same classmates from the 1st to the 9th form, sharing the same experiences with peers from different backgrounds and covering the whole range of abilities.

A fundamental principle of Danish educational policy is that everyone should have the same access to education and training that is basically free of charge from the time a child is five or six years old. All pupils are entitled to instruction that is adapted to their situation, the possibilities and the needs of the individual pupils.

The purpose of special needs education and other special pedagogic assistance is to encourage the development of pupils with special educational needs in accordance with the guidelines, which are stated in the Provision of Purpose in the Act of the “Folkeskole”. It must be ensured that pupils leave school with a basis for further education or employment.

The Danish government sets up the act, the rules, the goals, and the framework for education. The local school authorities are responsible for the education of all pupils. The responsibility for the expenses for special needs education and other special educational assistance lies with the local council (the municipality), except for the expenses for pupils with extensive needs or support (8,800 or approximately 1.4% in 1998/99). The expenses for these pupils must be paid by the county council, except for a certain rate amount that must be paid by the pupil’s local council.

#### ***Definitions of special educational needs/disability***

In Denmark, many attempts have been made to define special education. This is a difficult task, as the understanding of special needs education varies over counties and because this may lead to mixing content, structure and philosophy which has a blurring effect upon the distinctions. In recent years efforts have been



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made to define the concept on the basis of the objective of a school for all. Special needs education constitutes the potential of the school to support pupils whose needs are not fully satisfied in the mainstream education process. However, special needs education is not supposed to be an alternative, which exempts the pupils from the general provision. The goals of education apply to all pupils, but pupils can follow different tracks to get as close to these goals as possible.

Special education and other special pedagogical assistance is given to pupils, whose development requires special consideration or support, which cannot be given within the framework of mainstream education. These measures of special needs education must be initiated as early as possible, as soon as it is obvious that a child's normal development is at stake.

### ***Assessment***

If it is presumed that if a pupil needs special education, or if the pupil's schooling causes concern in other respects, the pupil can be recommended for a pedagogical-psychological assessment. This recommendation is made by the class teacher, or the school health service, but the parents and the head of the school can also ask for an assessment. After consulting the parents, the head of the school sends the recommendation to the Pedagogical-Psychological Advice Office. This office assesses whether the pupil has a need for special education or other special-pedagogical assistance. The office may discuss the pupil's situation with teachers or others who forwarded the recommendation and use the information to make proposals concerning arrangements that are considered appropriate.

When the Pedagogical-Psychological Advice Office assesses a special need, a report is written. The parents must be informed about the content of the report. A recommendation for special needs education is given after consultation with the parents. The decision to start with special education, or other special pedagogical assistance is made by the school head. Only with strong arguments can the office or the school head overrule the parents when they do not agree with the need for special education for their child. The Pedagogical-Psychological Advice Office monitors the development of pupils who are referred to special education. At least once a year, the office decides to continue, alter or stop the special education.

### ***Provision for pupils with special educational needs***

Special education can be arranged in different ways:

1. the pupil remains in a mainstream school class
  - a) and receives special needs education in one or more subjects as a

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- supplement to the general teaching
- b) and receives special needs education that substitutes the pupil's participation in the normal education in one or more subjects.
  2. the pupil's membership of a mainstream school class stops, the entire education is given in a special class either within a mainstream school or within a special school
  3. the pupil is a member of either a mainstream school class or a special class, but receives education in both types of classes.
- Special classes exist for pupils with learning difficulties, dyslexia, a visual impairment, hearing problems and for pupils with a physical disability.

### ***Number of pupils with special educational needs***

In Denmark, approximately 80,000, or 12 -13% of the total number of pupils in primary and lower secondary education, receive special instruction for shorter or longer periods of a school year (1998-99). Of these, 10,000 pupils are educated in separate settings, 6,000 attend special classes in mainstream schools, while 4,000 pupils attend special schools. The percentage of pupils in segregated provision is about 1.5%: approximately 0.6% in special schools and 0.9% in special classes in mainstream schools. (The number of pupils in "Folkeskole" is about 640,000 in 1998-99).

### **3.4.2 Financing**

#### ***General situation of funding of education for pupils with special educational needs***

Municipalities (or counties in case of education of pupils with severe disabilities) determine the amount of money that is spent on their schools. The municipalities receive money from the state via block grants depending on objective criteria such as the amount of inhabitants in different age groups and local taxes. The local school authorities are responsible for making sure that there is enough money to give special education to all pupils with special educational needs, as mentioned in the national legislation.

The allocation of resources to special needs education depends on decision-making within the local school authorities.

#### ***Decision making processes concerning funding of special education***

The decisions about special needs education must be taken within the given



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framework of education and considering the allocation for special education. There are different models with regard to the allocation for special education:

### **Local council concession for special education**

The local council earmarks a grant for special needs education in all schools in the area. It may be left to the principal of the Pedagogic-Psychological Advice Office to administer the grant. This arrangement implies that a proposal from this Office concerning a certain number of special education lessons for a pupil will be based on the resources available to carry out the proposal.

### **Arrangements with decentralised grants**

The local council can give a grant to individual schools for special needs education based on the number of pupils. The grant may also be based on the possible different needs for special education lessons that the individual school has. The grant is administered by the school head according to the principles concerning special needs education in the school that the school board lays down.

The resources for special needs education can also be included in a total economic framework for the school. The school board is then responsible for the allocation of the resources for special needs education with reference to the State School Act. The school head takes the specific decisions.

Sometimes a need for special education lessons arises during the school year, which exceeds what the individual school could foresee in advance. In that situation, the needs of the pupils with a documented need have to be fulfilled in all circumstances. The local council with decentralised arrangements is approached to allocate a special grant to meet such extraordinary situations.

Schools are free to use special needs funds for different goals: materials, methods, specialists, additional teachers and so on.

### *Effectiveness, efficiency and strategic behaviour*

There has been no evaluation of these topics in Denmark. The type of funding of special needs education is the same as it is in all areas in the political system.

### *Accountability*

The Pedagogic-Psychological Advice Office follows the development of pupils that are referred to special needs education and decides at least once a year about continuation, alteration or ending the special education. The parents and the pupils must receive information about developments at least once a year.

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## 3.5 England and Wales

### 3.5.1 Special education

#### ***Inclusion/Integration policy***

The present position concerning special needs provision is grounded in the Education Acts of 1981, 1993 and 1996. The expectation is that a pupil will attend a mainstream school if this is compatible with the pupil receiving the special educational provision required, the provision of sufficient education for other pupils, the resources being used efficiently and the wishes of the parents. The basic approach is that a special school place is only considered after a mainstream school place has been found inappropriate.

All local education authorities (LEAs) are formally committed to integration, but their methods of implementing the policy vary according to local circumstances.

The relatively well-established commitment to integration has been affected by the Educational Reform Act of 1988 and subsequent developments:

- The National Curriculum applies to all pupils, regardless of their learning difficulties.
- Most of the education budgets of local authorities are delegated to schools who may use them as they wish, subject to statutory obligations.
- Schools have gained a greater degree of autonomy and can follow their own policies independent of the LEA.
- The results of National Curriculum assessment and public examinations are published in league tables.
- The right of parents to state a preference for the school their child attends has been extended to parents of pupils with special educational needs.
- There is considerable interest in the school improvement and school effectiveness movement.
- The Code of Practice on the Identification and Assessment of Special Educational Needs is under revision.

These developments can favour or impede integration according to how they are interpreted. For example, parents may choose mainstream or special schools for their child, schools may focus on those pupils who will make a difference to the “league tables” results, schools may spend more or less than their nominal allowance for special needs education and so forth.

### ***Definitions of special educational needs/disability***

The Education Act 1993 states that a child has special educational needs if he or she has a learning difficulty which calls for special educational provision to be made for him or her. A pupil has a learning difficulty if he or she:

- has a significant greater difficulty in learning than the majority of pupils at the same age
- has a disability which either prevents or hinders the pupil from making use of educational facilities of a kind provided for pupils of the same age in schools within the area of the local authority
- is under five and falls within the first two definitions above or would do if special educational provision was not made for the child

Special educational provision means for a child over two, educational provision which is additional to, or otherwise different from, the educational provision made generally for pupils of the child's age and for a child under two, educational provision of any kind.

The Code of Practice on the Identification and Assessment of Special Educational Needs (DFE, 1994) recognises needs in eight categories, learning difficulties, specific learning difficulties, emotional and behavioural difficulties, physical difficulties, hearing difficulties, visual difficulties, speech and language difficulties and medical conditions. These categories are not mutually exclusive: merely a guide to the identification and assessment of difficulties in learning and giving the opportunity for a broad description of the manifestation of difficulties in each of the categories. One of the criteria of need is failure to perform within the national curriculum.

### ***Assessment***

The existing Code of Practice recommends a five staged model of assessing special educational needs, though it should be pointed out that the Code is currently under revision and it is expected that the five stages will be reduced to three. The stages represent an ever-widening circle of support.

In the first stage, the mainstream class teacher identifies or registers a pupil's special educational needs and takes action after consultation with the school's special educational needs co-ordinator (SENCO). In stage two, the SENCO takes responsibility for gathering information and for co-ordinating the pupil's special educational needs, in collaboration with the pupil's mainstream teacher. In the third stage, the SENCO and the mainstream teacher are supported by specialists external to the school. In step four, the local educational authority considers the

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need for statutory assessment and makes a multidisciplinary assessment, if appropriate. In the final stage, the LEA considers the need for a statement of special educational needs and, if appropriate, draws up a statement.

Assessment is perceived as a continuous and flexible process in which mainstream monitoring, review and evaluation are required. Both parents and pupils are expected to be involved in all decision-making. Further, the Code of Practice stresses that early intervention is crucial, that needs may be influenced by school characteristics, that assessment should include all available information, that assessment instruments and procedures should be culturally neutral and that multi-professional agencies should collaborate.

In general, emotional and behavioural difficulties and moderate learning difficulties tend to be the two largest categories of need, with specific learning difficulties an increasingly identified need.

### ***Provision for pupils with special educational needs***

In England and Wales, a continuum of provision exists implying an increasing degree of speciality and distance from the environments in which the majority of pupils are educated. The following settings can be distinguished:

1. the mainstream classroom
2. a combination of the mainstream classroom environment and a special setting within a regular school
3. a combination of the mainstream classroom and a special setting outside a mainstream school
4. a special setting inside a mainstream school such as a unit or special class
5. a special setting outside a mainstream school such as a day special unit or school
6. a special residential school

The most recent statistics from the government - those for 1998 - indicate that there are 1,229 special schools in England, of which 1,143 are maintained by the LEA, 65 non-maintained (run by voluntary organisations) and 21 grant maintained (the latter receive a grant directly from central government; the status and nomenclature for these schools is currently under revision and will be reflected in future statistics.) There are no national statistics on the number of special units attached to mainstream schools, or special classes within mainstream schools.

There are visiting teachers working in mainstream schools, but there are no data available yet concerning the position and the number of these teachers.



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### ***Number of pupils with special educational needs***

In relation to the numbers of pupils identified as having special educational needs in England and Wales, the focus can be upon the number of pupils with statements (for the more severe needs) or upon the numbers of pupils who are on the register of special educational needs which all schools are expected to maintain. Published statistics for England and Wales does not allow the separate identification of the data for pupils with special educational needs by age (other than a primary/secondary phase distinction), type of provision and category of special need nationally. It is only possible to give national statistics for pupils with statements.

The overall figure (1998) for pupils with statements in England (only) is about 2.9% of the school age population. In 1991 about 2% of all pupils had a statement. At January 1998, 58% of the pupils with statements were placed in mainstream schools. The percentage of pupils in special schools ranged from 0.2% to 2.4% of the school age population across LEAs.

Since 1996, figures for pupils on mainstream schools' special educational needs "register" have been returned to the government annually, but the interpretation of these figures is difficult. Research has shown that pupils with similar needs may be on different stages of the Code.

The total percentage of pupils identified by primary schools as having special educational needs is 19.9% (1.5% of those statemented) and the percentage of pupils with special educational needs in secondary schools 18% (2.4% statemented). The variation across schools and LEAs is considerable.

Since 1990, the number of pupils in special schools in England has slightly risen and is now about 100,000 (including pupils in the so-called pupil referral units). However, as the overall number of pupils is also rising (from about 7.5 million to more than 8 million), the percentage of pupils in segregated provision is fairly stable and varies between 1.2 and 1.3%.

As previously mentioned, the number of statements has increased in the last five years. This is especially the case in secondary schools where the number of pupils with statements increased by more than 100% in a period of five years. Please refer to the next table for the development of integration of pupils with statements in England. The percentages represent the (development in the) proportion of pupils with statements within the specific provision.

	1991		1994		1996	
	number of	%	number of	%	number of	%
	statements		statements		statements	
total	153,228	2.0	194,541	2.5	227,324	2.8
<i>maintained</i>						
nursery school	264	0.5	318	0.6	425	0.8
primary school	32,655	0.8	50,112	1.2	61,676	1.4
secondary school	29,056	1.0	50,142	1.7	65,137	2.2
special school	80,367	87.6	83,673	89.6	87,458	94.2
pupil referral unit	-	-	-	-	1,826	26.6
<i>other schools</i>						
independent	5,621	1.0	5,458	1.0	5,810	1.0
non-maint. special	5,265	87.3	4,838	87.3	4,992	95.6

### 3.5.2 Financing

#### *Financing of special needs education*

All funding for special needs education is, essentially, input (needs) or throughput (task) funding.

The budget of mainstream schools comes under the respective local authority's Local Management of Schools (LMS) scheme. The budget is principally determined by the number of pupils on roll, and can therefore fluctuate year by year.

All mainstream schools are funded, in their base budget, to provide for pupils with special needs. It is expected that this base budget will be adequate to meet all transient needs of those pupils who need some extra support or differentiated materials, but whose needs can be met mainly by the classroom teacher with, as necessary, advice and guidance from a specialist teacher within the school staff. The base budgets of schools vary according to the local authority largely on account of the local differences in the age-weighted pupil units (AWPU), which constitute 80% of the base budget of the school.

In most cases, schools receive additional money with respect to those pupils whose needs are greater and who will, for example, probably need assistance from external agencies such as the local authority support services. The extra amount that schools are allocated is determined by different methods across local



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education authorities. These include:

- a proxy indicator of socio-economic disadvantage. The most common indicator is the number of pupils who are entitled to free school meals
- the results of screening tests
- “audits” of special needs. In some local authorities, schools are required to present documentation relating to all pupils with special needs, detailing the difficulties and the provision made to address these needs. The degree of need is then ascertained and an additional unit of resource made available.
- The school register of special needs. This is related to an audit but is more general, merely listing the number of pupils at the school at different stages of the Code of Practice (stages 1 to 5). The Code essentially represents an ever-widening circle of support. From stage 3 external support services are needed. Schools are usually allocated additional resources with respect to pupils at stage 3, occasionally at stage 2. Provision for pupils at stage 1 has to be made from the age-weighted pupil unit.

Different methods may be used for primary and for secondary schools within one authority and in many cases a combination of methods is used to determine the level of need. The additional resources are intended for the school to purchase advice and guidance from external agencies.

It is acknowledged that the needs of pupils with a statement (about 3% of the school age population) cannot be addressed within a schools’ ordinary resources. For a pupil with a statement additional resources are usually available to the school, either in support or equipment or in cash, which the school can spend as it deems most appropriate to meet the pupil’s needs.

Some mainstream schools have special units or are “resourced” schools. These schools have an additional element in their budget for a set number of pupils with identified, and often quite significant, special educational needs. The additional element remains stable even if the actual number of pupils falls below the set number. The actual terminology and means of resourcing do not necessarily determine the level of integration or patterns of provision.

The budget of special schools comes under the Local Management of Special Schools (LMSS) and is principally determined by the number of places that it offers. The budget does not alter significantly when there is a fluctuation in numbers of pupils. The place element is determined by a formula and usually refers to the type of need and the level of need. Present budgets are usually based on pre-formula budget allocations that were often influenced by staffing levels

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recommended by the government.

When special schools have a “spare place” the local authority often expects them to use this to engage in outreach work with mainstream schools. In some authorities, special schools always have “spare places” to work with mainstream schools. Many special schools have link arrangements with mainstream schools to be able to let pupils spend time in mainstream classes or to use facilities. Schools rarely receive money for these activities.

The local authority decides on the number and type of special schools and the number of places within them.

### *Decision making processes concerning funding of special education*

In the Standard Spending Assessment (SSA), the government annually indicates the total budget of local authorities necessary to provide a standard level of services. For education, this is composed of five sub-elements (reflecting phases of education) within which special needs education is considered according to a formula based on socio-economic measures. Local authorities are not bound to keep to the budgets suggested by the SSA and are free to allocate the total amounts available to them as they wish.

The mechanisms local authorities use to calculate the budget for schools vary considerably, both in the indicators they use and in complexity. Similarly, schools' total budgets are determined by the local authority's LMS and LMSS schemes which are formula based and have to be approved by central government. Once schools have received the total budget, they are free to spend it as they wish.

It is difficult to determine the overall spending on special needs education within local authorities. There seems to be a degree of consensus that, nationally, it is from 12-15 per cent of the educational budgets available.

Once money has been allocated to a school, the school may use that money as it chooses. However, the freedom under the terms of the LMS is circumscribed by the statutory responsibilities for special needs education given to school governors (the Education Act 1993 and 1996) and also by the fact that all maintained schools have to “have regard to” the Code of Practice on the Identification of Special Educational Needs (DFE, 1994).

### *Effectiveness, efficiency and strategic behaviour*

In theory, systems are designed to give funding at a point nearest the actual need and to those who are identifying that need and meeting it on a day-to-day basis. Thus responsibility for special needs education is given to schools who have also



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been given the resources to fulfil this responsibility. This favours integration in that support can be provided wherever the pupil is rather than only being available within segregated provision.

However, at a time of financial stringency and many other demands on schools and teachers, there is a danger that pupils with special educational needs become regarded as “a problem”, that can only be resolved with additional resources. These pupils may be directed towards schools that do not see them as a problem. Schools that are perceived as being effective with pupils with special educational needs may get an unbalanced enrolment that no longer represents a comprehensive intake. This will affect the concept of integration and inclusion.

Although there is a high degree of interest in the relationship between patterns of funding and levels of integration - and in the effectiveness of different patterns of resource allocation - there have been no systematic studies into these subjects.

Most of the discussion about the efficiency of funding in England and Wales relates to the indicators used for the allocation of additional resources for special needs. Data on some indicators are readily available; data collection for other indicators takes much more time and money, but leads to more targeted funds.

### *Accountability*

As a general rule, schools do not have to report to others how special needs education resources are spent and the results of this spending. It does occur where informal arrangements among clusters of schools have been established within an area. Schools also have to be answerable to the local authority and to formal inspection by “OFSTED” (the Office for Standards in Education). On a more informal basis, resource allocation will be considered by members of the visiting support services and the special educational needs advisor (where these posts still exist). However, it often remains unclear how schools monitor their special educational needs policy and how they link resource allocation to this.

All pupils with statements have an annual review, but the way these reviews are conducted varies enormously. Such data are underused in relation to the examination of resource allocation with respect to progress made and current needs. At a national level, the Audit Commission reported on special educational needs funding, but there is no evaluation of the special needs provision.

Parents must be informed about the provision at a particular school and must be regularly informed of and involved in interventions and the child’s progress once s/he is on the special needs register. The Code of Practice stresses that parents are partners in the educational process.

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## 3.6 Finland

### 3.6.1 Special education

#### *Inclusion/Integration policy*

In Finland, recent public discussion upon values and policies concerning disabled people and the provisions of special needs education has influenced the national reform of civil rights. According to the Comprehensive Instruction Law (1999) everyone receives education in accordance with his or her age, potential and special educational needs. Everyone has the right to a high-quality learning environment. Within education, co-operation with the home environment is necessary.

The Comprehensive Instruction Law places an obligation upon the municipality to provide comprehensive school teaching for all pupils of compulsory school age within its territory. The municipality can discharge the obligation by collaborating with other municipalities, or by engaging other educational institutes such as state-owned special schools.

The reforms of school administration in the 1990s with decentralisation of decision-making to the municipalities has decreased the number of special schools, whilst special classes have been founded in mainstream schools.

Special education is provided to all pupils who are unable to cope with mainstream instruction because of intellectual or physical disability, learning disorder or some other reason. Such pupils, who have minor learning difficulties or problems in adjusting to work, have the right to receive special needs education within mainstream instruction. The Law does not categorise pupils into “types” of disabilities.

It is the duty of the municipality and the individual school to integrate pupils with special educational needs into the mainstream educational system. Educational, social and health authorities must co-operate in arranging instruction for pupils with special educational needs.

The first alternative of providing special needs education is to integrate pupils with special educational needs into mainstream classes and, when necessary, provide special needs education in small teaching groups. Only when this is not feasible, is the second alternative considered: the provision of special needs education in a special group, class, or school.

Disabled pupils have a right to pre-school education for two years, provided by either the educational or the social authorities. The educational authorities have



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the responsibility for arranging and implementing this education. The municipality may also arrange additional education for one school year for pupils that have already completed their compulsory education.

The Finnish government has approved a Development Plan for the period 1995-2000. The overall principles of this educational development are high quality, equal opportunities and lifelong learning.

The National Board of Education and the Ministry of Education are launching a research and development project for the period 1997-2001, seeking to improve the comprehensive school in terms of its flexibility both content-wise and structurally. The part of the project focused on special needs education is based upon the findings of an evaluation report on the state of special education. The purpose is to improve the operational organisation and integration practices of special needs education at the regional, municipal, school and pupil level, as well as to gather information on the success and feasibility of integration practices. Another goal is to improve the identification of pupils in need of special help, as well as to enhance their access to appropriate support and instruction.

Amongst others, the following projects were launched in 1996:

- Development of integration and production of models regarding municipality, school and pupil-level planning, organisation and implementation of integrated special needs education in co-operation with various interest groups.
- Case studies will be prepared focusing on successful special needs education arrangements and on their financial outcomes.
- The statistics on provision, resources and costs of special needs education will be elaborated upon in order to obtain a continuous view on the state of special needs education nation-wide, as well as to acquire comparative data on the effects of regional and municipal differences.
- It will be ensured that for each pupil transferred to special education, a personal curriculum will be drafted.

### ***Definitions of special educational needs/disability***

Pupils with special educational needs are not categorised by legislation, but the classification and grouping for various sectors of special education is determined by the educational needs of these pupils. Special educational needs are divided into nine basic categories.

1. pupils with mild learning difficulties
2. pupils with moderate learning difficulties
3. pupils with hearing impairments

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4. pupils with visual impairments
  5. pupils with physical and other impairments
  6. pupils with emotional and social disorders
  7. pupils with specific learning disorders
  8. pupils with severe intellectual deficiencies
  9. pupils with other problems such as epilepsy, diabetes and other problems that do not fall into the other categories.

For pupils with specific learning disorders, part-time education is provided.

In total about 15% of all pupils in the comprehensive school have special educational needs. Category seven counts for the most pupils: about 11.2% of all pupils in the comprehensive school belong to this type of special educational needs. Category one caters for about 1.7% and the other categories have percentages below 1%.

### ***Assessment***

Transferring a pupil to special needs education is possible when he or she cannot cope with studying in a mainstream class, or is otherwise unable to adjust to a mainstream class. In such cases, the school board makes decisions regarding the provision of special education. Before making this decision, the school board has to hear the opinion of the parents and a specialist. When necessary, the pupil has to undergo a medical and psychological examination by an expert and a social report is made about the pupil and his or her circumstances.

### ***Provision for pupils with special educational needs***

The number of special schools has decreased from 362 in 1991 to 306 in 1994. On the other hand, the number of separate special needs education classes has increased, a result of groups from closed special schools being incorporated into mainstream comprehensive schools.

The state maintains eight special schools providing comprehensive school education. (In 1994/95, there were 562 pupils in state-owned special schools). These schools are primarily intended for pupils with hearing or visual impairments or with a physical and other impairment. The state-owned special schools also serve as national centres for development and services and negotiate related policies with the National Board of Education.

In the school year 1994/95, there were 3,290 special teachers and teachers of special classes, 413 part-time teachers working in special education, and 1,600 school assistants in comprehensive school. Special class teachers work with pupils



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in special classes. Special teachers take care of pupils in mainstream classes who need part-time special training and suffer from specific learning difficulties, or more general face problems with studying and concentrating, or with their social relations.

### ***Number of pupils with special educational needs***

In the school year 1994/95, the total number of pupils in the comprehensive school was about 587,500, of these about 15% were involved in some sort of special education.

It is estimated that about 2% or 3% of all comprehensive school pupils attend segregated special education, in special schools or in special classes within mainstream schools. Some 12% to 13% of all comprehensive school pupils receive part-time special education. For most pupils this means leaving their mainstream classes for a few hours a week, to get instruction in a smaller group or individually. Only less than one percent of all pupils receiving special needs education are fully integrated in mainstream teaching groups.

Although placing pupils with special educational needs in mainstream teaching groups is considered the right thing to do, full time integration has proven to be difficult. Visually impaired pupils form the exception, 90% of them are taught in mainstream classes.

The integration policy has failed to decrease special needs education in segregated classes. The increase of part-time special education, which can be seen as a form of integration, has not resulted in a decrease of special classes. Class-based special needs education has a long and strong tradition in Finland that still favours segregation. Placement in special classes is usually permanent: the continuing retrenchments of the funds allocated for remedial teaching and part-time special needs education have decreased the possibilities of pupils being returned to mainstream education. It is the funding system that influences integration.

### **3.6.2 Financing**

#### ***General situation***

The responsibility for financing education in Finland is divided between the State and the municipalities. The State allocations are stipulated by the Act on Educational and Cultural Funding. The system for educational financing covers the statutory state allocations for operation and founding costs, discretionary state

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grants and other funding. The criteria for funding are the same regardless of the form of ownership. State funds for running expenditure are granted on the grounds of unit-based flat rates, which are confirmed each year per student, teaching hour or other unit. These subsidies are calculated to cover 57% of the operating costs. The main factor affecting the state funds is the number of pupils. The funding may be granted to a municipality, an inter-municipal consortium or to a private community or foundation. This funding is not earmarked for any particular costs. There is a separate Act stipulating the division of financial responsibilities for the comprehensive school, senior secondary schools, vocational education and culture.

Relative to their population, all municipalities pay an equal sum of costs. The funding system takes into account economic differences between municipalities by standardising their revenues. Calculating a nationally fixed rate per inhabitant, to be covered by the municipalities as their share of the operation costs for education and culture evens out the overall load of the municipalities. The amount of the municipal-specific state subsidy is determined by taking the unit-based expenditure figure calculated for this municipality and subtracting the nationally fixed municipal share of cost.

For the comprehensive school, the flat rates are based on costs per student, calculated biannually from actual expenditure.

### *Financing of special needs education*

The state subsidies are calculated from student-based expenditure figures reported by the municipalities in September. From these figures national averages are calculated, with extra weighing for pupils in special education. This system is rather flexible. The state does not prescribe how the municipalities should use the funds; the municipalities can use the funds and arrange educational services, as they see fit. It is assumed that municipalities are willing to allocate funds to special education, because pupils in special needs education receive an extra weighting in the calculation. When necessary, the state can award discretionary additional funding for possible extra costs.

### *Recent developments*

As a result of the economic recession of the early 1990s, the resources allocated for special needs education have been significantly curtailed. The cost development of both special needs education and mainstream education has changed considerably in this decade. However, at the national level, the costs per



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pupil in special needs education given in comprehensive schools have decreased more than the average costs of the comprehensive school as a whole. Moreover, the cost development of special needs education showed considerable regional differences and also differs between groups of special needs education institutions. The various trends now result in less variation in the costs per pupil, regardless of educational institution, municipalities and regions.

#### *Decision making processes concerning funding of special education*

The schools may decide how they use the money they receive. Annually, the teachers present the needs of financing for their own class to the principal in a staff meeting. The meeting then discusses the allocation of resources and the principal takes their proposal to the municipal school board that decides on the distribution of resources among the schools in the municipality.

There are no separate funds for special education, the funding of special needs education is part of the funding of mainstream education. Thus, various grants can be used flexibly according to school-specific needs.

#### *Effectiveness, efficiency and strategic behaviour*

The funding system does not impede or restrict integration efforts. The granting system for state subsidies, which is fully flexible, facilitates integration and its implementation. However, there has been no evaluation on this matter so far.

#### *Accountability*

Central administration monitors and evaluates the appropriateness of the allocation of the funds.

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## 3.7 France

### 3.7.1 Special education

#### ***Inclusion/Integration policy***

In France, education is compulsory from ages 6 to 16. The educational system is divided into three levels: primary school, which includes two sub-levels, nursery school and elementary school (8 years); lower secondary school, called 'collège' (4 years), and sixth-form collège called 'lycée' (3 years). During their last year at the lycée, pupils are allowed to pass their A Level Certificate, or 'Baccalauréat' (general, technological or vocational direction).

Primary school is divided into three cycles. Nursery school is attended by pupils from age 3 to 6, and nearly 100% of the country's pupils actually go to nursery school. During the first two years they acquire initial learning skills. The last year is part of the basic learning cycle that also includes the first two elementary school years. During the last three elementary school years the learning skills acquired by the pupils are developed and reinforced. Secondary school teaching includes the 'collège' and the 'lycée'. Lower secondary school is divided into three cycles: adaptation (first year), a central cycle (two years) and an orientation cycle (one year). After the collège, young people are guided towards a general, technological or vocational lycée. Over 92% of all pupils continue to pursue their studies after the age of 17. Around 14% accomplish their primary cycle in a private school (20% at secondary level). However, most private schools have signed contracts with the State and are part of the country's educational public service.

Since the mid 1970s, the French educational system has undergone a series of changes which may be divided into three broad categories. First of all, within the legal and regulatory framework of the current French educational system, a wide range of diversified teaching methods for mainstream classes have been developed. This variety appears indispensable to deal with heterogeneous populations. Secondly, the administration system for National Education has, as with all French State institutions, been thoroughly reorganised in compliance with territorial decentralisation laws, which have transferred responsibilities from the central State to local authorities (regions, departments, districts). This territorial decentralisation was accompanied by an administrative de-concentration process which has transferred responsibilities from central administrative bodies (Ministry) to regional and local National Education services ('Rectorates', Academic Board of Inspectors). These two converging processes have enabled the



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system to better adapt to local or regional conditions. Finally, since the Law of 10 July 1989 was passed, the very concept of the right of all pupils to receive an education has been redefined since it is no longer confined to compulsory school attendance. Every pupil is entitled to attend nursery school at the age of 3.

Furthermore, every young person must be offered education through which he or she can acquire a professional qualification, if he or she so desires. This concept is totally non-discriminatory as it applies to all pupils or teenagers whether they have specific educational needs or not. Furthermore, a memorandum issued on 18 November, 1991, co-signed by the Ministry of Public Health and Social Affairs, specifies that the school, college or lycée which is the nearest to the place of residence of a disabled pupil is in principle supposed to receive him or her for his or her school integration. Likewise it is considered a priority in socially deprived areas, to begin educating pupils in nursery schools as soon as they reach the age of two.

Specialised education is not under the sole jurisdiction of the Ministry of National Education. It is also supervised, to a large extent, by the Ministry of Public Health and Social Affairs, as well as by the Department of Justice. Specialised education is based on a tightly-knit network of classes, schools and specialised establishments and it must be emphasised that a policy designed to prevent learning difficulties has been implemented. The general trend today is to avoid, as far as possible, sending a pupil to a specialised institution when it is not absolutely necessary. Moreover, the current policy is to minimise the time spent by the pupil in a specialised institution.

The system's integration strategy should also be enhanced by the flexibility made possible by decentralised decision-making. Local decisions make it easier for various institutions and nearby services to co-operate. However, despite a clear-cut policy seeking to develop educational integration, the practical implementation of this policy encounters a number of difficulties. Several problems and obstacles remain. They must be overcome in order to help provide proper education for the most vulnerable pupils.

### ***Definitions of special educational needs/disability***

The Outline Law for Disabled People (30 June, 1975) is characterised by the fact that it does not define a disability or a disabled person. French legislators deliberately chose to proceed otherwise: they created a local body, the Commission Départementale d'Éducation Spéciale (CDES) which decides what financial or learning assistance measures should be specifically offered to each individual pupil. No action can be taken without prior consent of the child's parents. With this

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provision the only possible definition is the following: “a disabled child is a child for whom the CDES has taken a decision”.

Another provision of the law should be stressed: CDES measures are never permanent and they are all limited in time. Thus, the CDES can provide help for pupils who have a sensory, motor or intellectual disability, a chronic disease or disability. On the other hand, it is competent to orient pupils only toward certain establishments and services (called medical-educational). As a result (as the CDES can only take decisions concerning a referral to medical and educational settings and services), other pupils can be guided towards institutions or entrusted to various services: by a medical decision; in compliance with a ruling issued by a juvenile court judge who considers that they are “in danger”; or in accordance with measures of “social assistance to pupils”. These pupils also have “specific needs”, but their guidance is not determined by the CDES.

On 1 January, 1992, 57.8% of the pupils and teenagers admitted to medico-educational institutions (controlled by the Ministry of Social Affairs) had intelligence deficiencies (more or less serious); 20.2% had other psychological deficiencies, 7.4% hearing deficiencies, 3.0% visual deficiencies, 6.3% motor deficiencies and around 5% had multiple disabilities. Their total number amounted to approximately 108,000. During the 1993 - 94 school year some 48,000 pupils (2% of the total school population) attended specialised classes in elementary schools. Slightly less than 120,000 teenagers attended specialised sections in collèges or specialised institutions controlled by the Ministry of National Education (4% of this age group population). Clearly, it is easier to reduce the number of pupils attending specialised classes in elementary schools.

### ***Assessment***

As explained above, in France the specific needs of pupils are evaluated according to various procedures and under the jurisdiction of different authorities. For pupils and adolescents (up to the age of 20) subject to the Outline Law for Disabled People (1975), Special Educational Commissions (CDES) are in charge of deciding guidance measures. The pupil can be oriented towards a mainstream or a specialised learning context (his or her programme may include, if required, a personal integration project and a rehabilitation or therapeutic follow-up programme monitored by specialised services). She or he can also be sent to a medical-educational establishment. No decision to guide a pupil towards these schools, services or establishments can be taken without a CDES authorisation.

When guidance measures do not require financial assistance by social security



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agencies, the CDES delegates its responsibilities to Pre-elementary, Elementary or Secondary Commissions (CCPEs or CCSDs) in charge of monitoring individual cases over smaller geographical areas. Statistical surveys concerning pupils and adolescents monitored by Special Education Commissions are conducted in compliance with the standard classification defined by World Health Organisation in its French version published in January 1989 under the title: *Classification of Deficiencies, Disabilities and Disadvantages*.

The CDES is also competent to grant a Special Education Allowance called 'Allocation d'Education Spéciale' (AES) to the person permanently in charge of raising and educating a child. However, AES allowances are subject to a specific condition: the child's disability rate must be at least equal to 50%. This rate is evaluated according to the child's health condition and by referring to an official scale (latest publication: November 1993). An AES is allocated for a limited period of time: payments can be terminated as soon as the child's health has improved. The AES can be granted to children and adolescents from ages 0 to 20. Subsequently, the adult person may be entitled, according to his or her health condition and degree of self-sufficiency, to a Disabled Adult Allowance and in some cases to other types of aid.

It is important to stress the fact that many pupils stand to benefit from preventive measures and specialised aids (without any involvement of medical and educational settings and services) whether at school or outside without a decision by a commission. Assistance measures in the school context are offered to the family by educational teams under the responsibility of the school principal. Help can be financed outside of the school context by Social Security agencies, upon presentation of a medical certificate. Other forms of assistance (for instance, free help for homework) can be set up by territorial authorities (districts, départements) or by associations, such as Non-Governmental Organisations (NGOs). They are usually offered to families by social services.

### ***Provision for pupils with special educational needs***

Specialised education programmes are under the responsibility of various ministries. The Ministry of National Education designs preventive and back-up programmes for pupils who have difficulties in school. It also directly manages a certain number of classes, sections and institutions for pupils and adolescents with various types of disabilities. Furthermore, it has a legal obligation to pay for learning expenses, wherever the pupil attends school and/or receives medical care. The Ministry of National Education cannot be relieved of its responsibility for

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paying teachers who take care of pupils with specific needs, whatever sector they belong to. The Ministry in charge of Social Affairs holds jurisdiction over all the establishments of the medical-educational sector. It monitors socio-educational institutions, although they are financed by *département* (local/regional) budgets. Some of these institutions are also licensed by the Ministry of Justice, which is directly in charge of very few establishments and services. Last of all, the Ministry of Public Health controls medical institutions.

### ***National Education Ministry structures***

Three types of structures or establishments can be distinguished:

- institutions operating within the framework of “mainstream” schools and the mission of which is to prevent learning difficulties;
- institutions in charge of collective and individual integration;
- institutions which provide “adapted” general and vocational education.

The first category includes specialised networks (created in April 1990) to provide assistance to pupils who experience difficulties at nursery school and primary levels. These institutions originated in former so-called “adaptation” structures: adaptation classes and ‘groupes d’aide psycho-pédagogiques’ (GAPPs: psycho-educational groups) created in 1970. These assistance networks include school psychologists and specialised teachers who provide educational or rehabilitation aids to small groups of pupils. Adaptation classes can also be set up (with a maximum of 15 pupils per unit). However, they should not - in principle - educate any pupil for a period exceeding one year. Professional workers of these networks only step in once families have been informed. Psychological tests and rehabilitation aids cannot occur without prior written consent by the child’s family. Over 37% of all specialised teaching positions are devoted to assistance networks. Their main task is indeed preventive.

Other structures available for school establishments are mostly collective integration or “adapted” teaching structures. Elementary schools include these ‘Classes d’Intégration Scolaire’ (CLIS). There are 4 types of CLIS: all are aimed at integrating pupils with intellectual, visual, hearing, or motor disabilities and enable them to attend school. There are less than 5,000 classes of this type in France. It must be emphasised that for each pupil attending a CLIS a personal integration project must have been defined. Moreover, he or she must spend some integration time in mainstream classes, according to his or her capacities. Most often, pupils are guided towards the CLIS by the CCPE, but many pupils also receive a CDES letter



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of notification so as to benefit from a rehabilitation or therapeutic follow-up programme provided by a medical-educational service, which is liable to operate in all various contexts of a pupil's life (school, home, day nursery, etc.). These services are often called SESSADs which stands for 'Service d'éducation spécialisée et de soins à domicile' (Specialised Education and Home Nursing Service).

Structures similar to the CLIS were set up in collèges in 1995 for pupils with an intellectual disability: the Unités Pédagogiques d'Intégration (UPIs). These units are still rather rare. They should help integrate some adolescents into mainstream schools after attending a CLIS or a specialised institution. Other collective structures are available in collèges and lycées for adolescents with a sensory or motor deficiency, but they are not called UPIs. Pupils are guided towards these structures by the Commissions d'Education Spéciale du Second Degré (CCSDs). The decision of the CCSD is completed, if required, by a letter of notification addressed to the CDES for a follow-up programme by a SESSAD.

A few (around 60) elementary level specialised schools remain. Originally, they were often created to receive pupils whose health condition was fragile, but now they fulfil a variety of tasks: for instance, they receive pupils with sensory deficiencies or a serious illness.

The third category of structures is designed to provide a "General and Vocational Adapted Teaching" to adolescents, usually in collège sections (or SEGPA). There are 1,500 such structures. They receive pupils from ages 12 to 16 and, sometimes up to the age of 17 or 18. These sections are operated by a specific staff: specialised school teachers, vocational lycée teachers; an assistant head teacher co-ordinates teaching methods and practices under the supervision of the Head of the collège. The first goal of the SEGPA is to provide its pupils with an education which will allow them access, in time, to a vocational training programme and a level V qualification - that is, a 'Certificat d'Aptitude Professionnel' (CAP: Certificate of Vocational Training).

In spite of all the efforts the number of pupils in the SEGPA sections remained quite stable (about 120,000). The recent trend is to persist with the need to introduce the SEGPA concept in more colleges, in other vocational schools as well as within the working environment. However, things are developing quite slowly because of the difficulties experienced by many teachers when dealing with teenagers known to be particularly difficult.

Last of all, 82 establishments offer boarding facilities to adolescents who also need an adapted general and vocational education: they are called 'Etablissements Régionaux d'Enseignement Adapté'. Most of these EREA's receive pupils who

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experience the same difficulties as those who attend SEGPA's, but also have family and social problems requiring that they attend a boarding-school. Some EREA's host pupils who have sensory and motor deficiencies and can provide a lycée level of teaching. They include a medical care unit. One must stress the fact that SEGPA's are only sections within an establishment, whereas EREA's are autonomous establishments with their own head teacher.

In order to be guided towards a SEGPA or an EREA, a pupil needs a CCSD letter of notification. As any commission decision, this notification is mandatory for establishments but not for families, which have a right of appeal.

### ***Provision controlled by other Ministries***

Structures designed for pupils with specific needs and which are under the jurisdiction of ministries other than the National Education Ministry, are varied and complex. Most institutions and services are managed by associations or private, non-profit, organisations. Several public establishments, representing 20% in terms of facilities, cover three sectors: the medical-educational, the socio-educational and the medical care sectors. In the medical-educational sector, there are two types of structures: mobile services, which focus on early prevention and part-time or full-time boarding schools providing medical care and education to pupils and adolescents with various types of disabilities.

Five categories of medical-educational establishments were set up to receive pupils with an intellectual disability, motor disability, multiple disabilities, hearing disabilities and visual disabilities. Decrees published in 1988 and 1989 were aimed at helping to create or transform some of these establishments into home or school support services providing special needs education and home care. They are called 'SESSAD' (Services d'éducation spécialisée et de soins à domicile). The goal is to offer the pupil, as much as possible, an ordinary life environment, whilst providing necessary support structures.

In the socio-educational and medical care sectors, various types of establishments are found to be operating. The socio-educational sector includes mainly Homes for Pupils which are managed by Social Assistance and other service institutions financed by departmental budgets. A number of these establishments are authorised by the Ministry of Justice for pupils who are "morally in danger" or who are delinquents. Very few establishments are managed directly by the Ministry of Justice. The health sector includes various private or public medical care establishments (pediatric services in hospitals or Homes for Pupils providing medical care).

### ***Number of pupils with special educational needs***

Around 2.6% of the country's pupils of the compulsory education age group, request assistance for specialised education (whether they are integrated in mainstream schools or attend specialised establishments). This percentage covers all the sectors controlled by different Ministries. Figures issued by the Ministry of National Education show that only approximately 2.4% of the country's pupils attend specialised classes or schools. Most of them attend classes or schools managed by the Ministry of National Education (see below).

**N.B:** A large number of these pupils are not subject to compulsory education.

#### Number of pupils educated in specialised structures 1994-1995

Ministry of National Education	Ministry of Health and Social Affairs
170,799	127,019

Out of a total of 170,799 pupils receiving specialised education in a National Education Ministry establishment, 48,413 receive primary education and 122,386 secondary education. A small minority of these pupils attend a private establishment.

#### Total number of pupils attending mainstream schools

Nursery schools	2,530,800
Elementary schools	3,964,100
1st cycle secondary	3,261,600
2nd cycle vocational	688,600
2nd cycle general and technological	1,482,100

Total	11,927,200
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Among the pupils included in these figures, some pupils with special educational needs attend mainstream schools on a full-time or part-time basis. 19,508 pupils with special needs are considered as attending primary education establishments. Figures are not available for secondary education. Most of the pupils attending (75%) are full-time.

Compared to previous years, the number of pupils sent to specialised structures has decreased. Up to 1980 - 1981, nearly 100,000 pupils attended specialised classes in elementary schools; today there are only 50,000. Over the same period,

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pupils attending elementary schools decreased by only 7%. Thus, compared with figures provided by the OECD in 1990, the percentage of pupils attending specialised institutions has dropped: the percentage was then estimated at 2.7%.

### **3.7.2 Financing**

#### ***General situation***

The French government spent 563 billion French francs on the State education system in 1995, i.e. 7.3% of the Gross Domestic Product (GDP). The law on territorial decentralisation (in 1982 and 1983) makes organisation of education a State responsibility: construction, reconstruction, maintenance, and operating expenses are allocated to towns for nursery and primary schools, to 'départements' for middle schools and to regions for high schools. The State compensates each of the authorities concerned with resources of an equivalent value, by transferring certain State taxes and by giving them a general decentralisation grant. Contributions made by each of the funding bodies have tended to change - the State's share has decreased (from 69.1% in 1980 to 65.4% in 1995). Regional authorities' contributions went from 14.3% in 1980 to 20% in 1995.

#### ***Financing of special needs education***

The distinction, established for administrative and political purposes, between the social welfare sector, the health sector, the medico-educational sector and the special sector of the National Education system, as well as accountability of social protection by risk rather than by beneficiary, reduces the precision of the analyses made in these areas.

#### **Spending related to special or adapted education**

The State is responsible for the schooling of all pupils and adolescents, regardless of their problems within the education system. It is only since the 1975 General Policy Act for the disabled that funding of educational expenditure and initial training in medico-educational establishments has been the State's responsibility. Delinquent pupils and pupils at risk can be placed in establishments within the jurisdiction of the Ministry of Justice or the Ministry of Social Affairs. However, regardless of the situation, provided that an agreement or protocol has been signed between associations which manage the institution and academic authorities, State teachers may be made available to these institutions to ensure that



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the young people receive an education in the event that they cannot be integrated into mainstream schools.

On the primary level about 6% of the total budget is allocated to special education, on the middle and higher school level about 2.4%.

### **Other funding sources**

Families with pupils who have a disability or a serious illness qualify for “special education allowances” (SEA). This monthly family benefit serves to help the family with expenses incurred in providing an education for the child. However, to be eligible for the grant the pupil must have a disability level of 50% or greater. In 1994 about 0.6 % of pupils under 20 years received a SEA. More recently (October 1991) a supplement was created for pupils with a particularly serious disability who need constant, highly technical care, to the extent that one of the parents is forced to stop working (there were 2,200 beneficiaries in 1994). The SEA is the only direct financial benefit set aside for pupils with disabilities.

### **Payments in kind**

The greater part of the social budget for school-age pupils with special educational needs goes to running specialised institutions and paying teaching staff working in educational institutions or assigned to medico-educational institutions through an agreement. Except for teaching expenses, the medico-educational sector is generally financed by the Social Welfare services. In principle, a price per day is set for each of the institutions, which is approved by supervisory authorities, and which varies for each institution according to the type of resources (human, material) they use. The payments are made on a case by case basis according to various methods - flat rate, payment by activity, overall budget.

Funding is also allocated to disabled youngsters from within other legal frameworks: for example funding of institutions as part of *Legal Protection of Young People*, services within the framework of pupils welfare, funding within the framework of health (hospital, special medical care and transport for example) and so on.

### *Decision making processes concerning funding of special education*

The issue is a complex one in this case. In fact, in France, no educational institutions manage the various funds they are granted freely. Of course, most private educational institutions have signed a co-operative agreement with the State. Schooling is free in these institutions since the State covers teachers' salaries.

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With regards to their relationship with special education commissions, they operate in the same way as public institutions.

*Nursery and primary schools* are not legal entities and are not financially independent. As for teaching personnel, the number of positions assigned to each school is decreed by the inspector of the school district, the director of *département* services of the National Education system (IA-DSDEN). Each IA-DSDEN has a *département* portfolio of budgeted posts assigned to him by central administration, following distribution criteria. These posts more or less take into consideration the degree to which a *département* is made up of city or rural areas and the number of schools located in particularly difficult zones, on a social and economic level (priority education zones, for example). It is up to the IA-DSDEN to organise the distribution of teachers with respect for the objective criteria and guidelines of their *département* policy.

Spending on maintenance, construction, repairs and operation of schools is covered by the townships, which also pay the staff.

According to the number of pupils who are sick and/or disabled and who need to be integrated, the township may be required to cover additional expenses to improve accessibility or facilities. The township may also hire, in certain cases, extra staff. In fact, some townships hire assistants on “employment-solidarity” contracts, who help the pupil to cope with his daily school life. If the pupil needs therapeutic or rehabilitative care, this care will be financed by social welfare funding through institutions or services called on to help. Depending on the case, the CDES (special education commissions) will need to approve this funding. Otherwise, a medical certificate is required.

*Secondary institutions* are legal entities with financial independence. The Supervisory Board of the institution votes on the budget, which is nonetheless subject to rather strict constraints. The chancellor distributes teaching hours among the institutions, on the basis of a grant from the central administration. A certain number of these jurisdictions relating to middle schools are, however, delegated to the *départements*.

Costs of maintenance, construction, repairs and the running of institutions are covered by the *départements* for middle schools, by the regions for high schools and professional training institutions.

When integration measures are taken, they are organised according to the same rules of funding as at the primary school level. However, in this case, the institution’s directors sign the agreements on behalf of the National Education system. The Supervisory Board is advised of all integration projects.



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### *Effectiveness, efficiency and strategic behaviour*

Currently, France is faced with restrictions on public spending, as well as an attempt to control spending funded by Social Welfare. Various changes (restructuring, creation of services and institutions for certain types of care, redeployment of staff, etc.) must be carried out within the limits of fixed budgetary portfolios. The capacities of medico-educational institutions are thus reduced, as part of a gradual move towards integrating pupils into a mainstream school, in order to create room for example for autistic pupils and pupils with multiple disabilities.

In terms of funding operations necessary for integration of pupils or adolescents with specific educational needs into a mainstream school environment, there are numerous difficulties linked to the way in which resources are allocated and to the decision-making process:

- Decentralisation and administrative de-concentration relieves central authorities with regard to the application of educational integration policy. On local levels the decision-makers can be made more aware of this issue, which leads them to work with numerous partners. The places in which decisions are made are close geographically, which offers greater efficiency. However, it initially creates disparities, which are related to geographical, economic and social conditions.
- When young or disabled people are transferred to mainstream institutions, there is often a feeling that “territories” are being redefined, which requires changes in organisation. From this point of view, integration may encounter resistance, in that it also appears as an obligation to redefine the professional identity of the personnel of the health and social sector as well as that of teachers.
- In terms of the logic of the financing of organisations, it is clear that for specialised institutions the principle of a “price per day” does not reflect the needs of an integrative approach. What constitutes one of the prerequisites for the functioning of specialised institutions may appear as a great obstacle to large-scale integration.
- The lack of additional financial resources makes it difficult to take important decisions concerning the training and recruitment of personnel, policies of equipping or improving the premises of the institutions.

The current French laws concerning the family give greater priority to benefits granted to *persons* rather than to financing projects for the development of the environment. It is legitimate for disabled persons to receive financial assistance

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such as the special education allowance. This allowance constitutes one of the forms of national solidarity with regard to these people, and they represent a strong symbol for them in the framework of the General Policy Act of 1975. It is no less obvious, however, that the non-accessibility of many educational, athletic, or cultural institutions and, to a lesser degree, the lack of adaptation of school premises (for example, for pupils with sensory or motor deficiencies) constitutes obstacles for integration into mainstream schools.

However, the idea of adapting the environment can have another meaning: it can also consist of the revision of professional work methods. Until recently, special classes or sections in mainstream institutions as well as specialised institutions worked side by side, on a basis closer to juxtaposition than creating systems or networks. Creating a new synergy in mutual contributions could, with equal financing, be a powerful dynamic factor in the educational, social and professional integration of persons with specific needs.

The hypothesis that the financial assistance provided to the parents of disabled pupils in the form of a special education allowance leads to abuses cannot be supported. Indeed, the methods of allocation are sufficiently strict. It is no less obvious that the social and economic crisis and the job crisis that accompanies it accelerate the process of educational marginalisation of children whose families are socially excluded, or are in the process of being excluded. These processes indirectly generate populations of pupils whose specific needs are more related to the social marginalisation of their parents.

### *Accountability*

It is important to stress the great variety in responsibilities as well as in the decision-making processes. This complexity is due, for one thing, to the plurality of financiers: the State, local and regional authorities, health insurance organisations, family allowance funds. It is also due to the multiplicity of decision-making centres: decisions at different levels of the administration of the National Education system, medical decisions, legal decisions, decisions of special education commissions, decisions of local and regional authorities. This multiplicity of decision-making centres itself on the complexity of rules and legal principles, which are sometimes parallel and sometimes overlap. Finally, it is obvious that territorial decentralisation and administrative de-concentration help increase pre-existing diversity, linked to geographical, economic and social conditions, and also to disparities in resources.

In the health and social sector, evaluation is determined more by the logic of



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obligation to use appropriate means than by a real obligation to obtain results. As in the medical field, there is an obligation to provide care, but not to cure the patient.

In *social and medical social institutions* it should be noted that financing - and the control of the use of funds allocated - is now based on indicators of completion of tasks, in compliance with procedures to be observed, resources to be used and on indicators of the intensity of the activity.

Generally speaking, financing is only secondarily based on indicators related to the quality of results. However, it should be noted that a broad range of points are now being investigated on the basis of various indicators and criteria, for example on the quality of contact with children or adolescents and on the quality of contact with parents.

Whatever they may be, the indicators chosen must be relevant, sensitive, reliable, as permanent as possible and of a sufficiently limited number so as not to make comparisons too complex (or even impossible).

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## 3.8 Germany

### 3.8.1 Special education

#### *Inclusion/Integration policy*

In Germany, educational legislation and administration of the educational system are primarily the responsibility of the “Länder”. The right of disabled pupils to education and training appropriate to their needs is enshrined in the Länder constitutions and more detailed provisions are set out in the educational legislation of the Länder. All the Länder have Ministries of Education, Cultural Affairs and Science, which are the highest authorities responsible for education, science and culture.

The instrument for co-operation between the “Land” governments is the Standing Conference of the Ministers of Education and Cultural Affairs of the Länder in the Federal Republic of Germany (this conference is called the “KMK”). Resolutions of the KMK have the status of recommendations. The Ministers are politically committed to transform recommendations into law. The development and organisation of special needs education in the Länder were harmonised by several decisions adopted by the KMK.

The Ministry for Education, Science and Technology of the Bund (Bundesministerium) is responsible for pilot projects and projects as well as for the upper secondary education and vocational training. Although the Länder are generally responsible for education in their own Land, in some cases - for instance in developing certain innovations such as the first “integration classes” - the Bund took the initiative and funded quite a number of the pilot studies targeted to integration and support of pupils with special educational needs.

In the last 20 years, the development of integration policy has changed towards better educational support for pupils with a disability in integrated settings. Germany has a differentiated system of special schools to guarantee appropriate support for disabled pupils in the compulsory age. Today, there is agreement that the aim of education is the integration of disabled children into professional life and society. However, a discussion started about how this aim can be reached. In 1988, the KMK decided that the system of special educational needs should be more flexible. Terminology changed from “the need for special education” (in a special school) to “special educational needs”. A new understanding of disabilities and educational needs has influenced the development of more integration, improved diagnostic techniques, more effective early intervention and prevention,



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better overall conditions at mainstream schools, more open approaches to instruction and education and a greater appreciation of the benefits for pupils.

In 1994, the KMK stated in a recommendation that the education of the disabled is more and more a co-operative task of all schools and that special needs education should be understood as a necessary resource for general education. The aim of these recommendations is to create equal opportunities for people with a disability by developing a better standard of special educational support in special schools and in mainstream schools. The development of education in general and the diversity of practical experiences with integration has led to visible change. Today, nearly all Länder have adapted their educational laws in line with the recommendation of the KMK. Several Länder have established advice centres to promote and translate educational legislation into action. This is a characteristic phase in Germany nowadays: it is now the time to put positive experiences of integration into laws and on a real and wider scale practice.

The first evaluations and research reports concerned with the question of whether integration is possible in mainstream schools, produced mostly positive results. Pupils with special educational needs achieved the same or even better results in mainstream schools than pupils in special schools. Disabled and non-disabled pupils profit from each other, especially in the field of social behaviour, responsibility, independence and self-confidence. The recent approach is that a special school is not the only place to ensure special educational needs are adequately met. Furthermore, it can be expected that some of the “Länder” will change their school law into the direction of more inclusive education: it is felt that pupils should stay together from the beginning of their school career, including pupils with problems in speech, behaviour, learning and so on.

### ***Definitions of special educational needs/disability***

Germany currently uses the term “sonderpädagogischer Förderbedarf”. This term, which is congruent with the term “special educational needs”, is defined by the recommendation of the KMK in 1994 as “the improvement of care and support for children and adults who are disabled or reduced in their possibilities in education, development and training.”

Pupils threatened by certain disabilities and/or in need of additional support because of problematic situations and pupils with temporary learning difficulties are supported by a combination of measures of internal differentiation within the structure of the general system and additional care and support.

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Special education is classified into the following categories with regard to special educational requirements:

- blind
- visually impaired
- deaf
- hearing impaired
- intellectually disabled
- physically disabled
- pupils with learning difficulties
- pupils with behavioural problems
- pupils with impaired speech
- pupils undergoing prolonged hospitalisation

In practice, there are many problems with these categories, mainly because a lot of disabled pupils cannot be unquestionably classified and an increasing number of pupils are multiply disabled.

### ***Assessment***

The assessment of special educational needs is based on multi-disciplinary reports. The special school, or in some Länder the support or resource centres are responsible for the report of special educational needs. If an institution makes an application for assessment, the parents of the child have to be informed and consulted. Parents can also make an application themselves and can object to a placement decision.

Education of pupils with special educational needs is more and more accepted as a common task for all types of schools. This means a changing attitude towards disabled pupils, the way these pupils should be educated and a changing view of educational assessment and diagnosis. To give appropriate support to a pupil with special educational needs, not only the child's intellectual and behavioural deficits should be assessed, but also the child's abilities, its developmental stage and its relation with its educational and social environment. The Länder within Germany have discussed this changing of diagnostic criteria. The Recommendation passed by the KMK in 1994 clarifies the necessity of overcoming traditional categories of pupils with disabilities in favour of more differentiated approaches of support and individual development. Eight diagnosis key-elements for pupils with special educational needs were set up: motor, perception, cognition, motivation, communication, interaction, emotion and creativity.

The diagnosis of special educational needs contains a description of the



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individual special educational needs, the decision about process of education and the place of support. To ensure appropriate support measures, it is necessary to get a qualitative and a quantitative profile that contains information concerning the development of learning and behavioural strategies, perceptual abilities, social relationships, the ability to communicate and interact, individual and educational circumstances in life, the school environment and possibilities for change, as well as the vocational environment.

The decision as to the place of support has to consider the adequate form of organisation which, in the best possible manner, enables methodical-didactic and therapeutic measures appropriate to the particular disability, corresponds to the socio-emotional needs of the pupils, stimulates self-identification and personality development and prepares the pupil for the acceptance of social and professional challenges.

### ***Provision for pupils with special educational needs***

Since 1975, an increasing number of disabled pupils have been integrated into mainstream schools through different pilot projects. Various forms of co-operation between mainstream and special schools have emerged and approaches to integrated teaching have been developed in educational science. A focus on institutions has been replaced by a focus on the needs of the individual.

Special education support consists of the following forms of organisation:

- Special educational support through preventive measures  
Pupils facing the threat of disability receive preventive assistance to help counteract the emergence of the disability.
- Special educational support in joint education/lessons  
Education with special support can be organised in mainstream schools in co-operation or with assistance and practical support of a special teacher, other professionals, or in some cases a social worker. Special support is provided inside the classroom, during class lessons, or outside the classroom, part-time or full-time depending on the individual, organisational and institutional situation.
- Special educational support in special schools  
Pupils whose special educational needs cannot be sufficiently met by the facilities within a mainstream school with support of the mobile special pedagogical service receive instruction in special schools. Special schools plan and guarantee individual support and education adapted to the pupil's needs.

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There are ten types of special schools and institutions (1997):

blind pupils	25
visually impaired pupils	30
deaf pupils	43
hearing impaired pupils	55
intellectually disabled pupils	750
physically disabled pupils	168
pupils with learning difficulties	1,669
pupils with behavioural problems	346
pupils with impaired speech	317
sick pupils	149
other	392
total	3,944

The “other” category consists of institutions that teach pupils that cannot be assigned to individual disability categories. Some special schools frequently work as all-day schools or boarding schools. Since 1986, the number of special schools (and institutions) has grown from almost 3,000 to almost 4,000 in 1996 (due to the unification of the five new BundesLänder in 1990).

- Special educational support in co-operative forms  
Many special schools and mainstream schools are in the process of developing close pedagogical co-operation. They offer opportunities for joint activities between disabled and non-disabled pupils. Co-operation may enrich school lessons and school life for all participants and expands the opportunities for changing between school types and educational courses.
- Special needs education with special units  
The aim of special education units, either as regional or supra-regional institutions, is to meet individual needs or a range of different needs and to guarantee special needs education in preventive, integrative and co-operative forms. This form of education is organised as near to the home as possible and provided by specialists.

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- Special educational support within the framework of special pedagogical support centres

In Germany, several Länder make the resource of special pedagogical know-how of special schools available by developing these schools into support centres. The main task of these “Förderzentren” is the further development of professionalism and organisation. The centres work as regional or supra-regional institutions with one or several key-points of support, and ensure support in a preventive, integration, institutional or co-operative form. Between the Länder, there are differences in conceptions and aims of the centres. The centres are in charge of the diagnostic process, organise courses for pupils with special educational needs, give advice to and co-operate with teachers, offer basic information, provide training and develop necessary aids and teaching materials.

- Special needs education in the vocational training sector and during the transition to work environment

Young people with special educational needs should be given the opportunity to receive vocational training, or have to be supported in integrating in a working environment that match the individual capabilities and skills.

- Special educational support in small special classes

These classes are organised for the educational support of pupils exhibiting temporary problems. Special educators take care of these learning groups. Some of these classes are tied to primary or secondary schools. Examples of these classes are observation classes, classes for diagnosis and promotion and classes for pupils with reading and writing disabilities.

### ***Number of pupils with special educational needs***

The official national statistics include all forms of special schools, but do not provide information about integration, prevention and co-operative measures. Some Länder have published a report about integration developments in their Land with numbers of special educational needs pupils in forms of integration. The proportion of integration varies between 5 and 25% between Länder (1997).

In Germany, about 4.4% of all pupils attend a special school. In the following table the numbers of pupils with special educational needs in the different special schools are presented.

Pupils with special educational needs in special schools (1997)	
in schools for learning difficulties	220,396
in schools for physically disabled	20,701
in schools for intellectually disabled	60,735
in schools for speech impairments	32,195
in schools for hearing impaired	6,236
in schools for deaf	3,828
in schools for visually disabled	2,450
in schools for blind	1,850
in schools for behavioural problems	22,515
in schools in hospitals	7,965
in other schools	26,510
 total	 405,381

Since 1991, the number of pupils in special schools has grown. In percentages (within the denominator both general and special education) this is a slight increase (from 4.2% to 4.4%).

### **3.8.2 Financing**

#### *General situation*

The basic framework for financing and funding education is the yearly budget of the Federation, the Länder and the local authorities. Decisions on the financing of education are taken at all three levels, but over 90% of the funds are provided by the Länder and the local authorities. The way education is financed in detail differs from Land to Land.

The Ministries of Education of the Länder finance the costs of the teaching staff. The local authorities, the maintaining bodies, are responsible for funding the material costs and non-teaching staff. The governing bodies of private schools receive some financial support from the Länder. All of the Länder guarantee standard financial support to schools entitled to such assistance; this includes contributions to the mainstream staff and running costs. Where schools have catchment areas extending beyond the local area, the Land is the governing body and therefore also responsible for funding the material costs and non-teaching staff.



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### *Financing of special needs education*

Special needs education is financed in the same way as mainstream schools. The specialised teachers that work in special schools and the special teachers that belong to special schools, but work in mainstream school receive the same salary. Some special schools are funded by the local authorities - such as schools for pupils with learning disabilities. Other schools are funded by the districts - such as schools for pupils with learning difficulties. Supra-regional schools such as schools for blind and vision impaired and schools for deaf and hearing impaired are, as a rule, funded by the Länder.

### *Decision making processes concerning funding of special education*

During the decision making process, questions have to be clarified such as: What type of intervention is the best for the child? Which type of school could provide this intervention? How suitable are the conditions concerning personal support and assistance, the school organisation and so on? What is the degree of special educational needs of the particular pupil? Are there any additional needs, such as technical aids, transport, the necessity of school attendants, questions of architectural changes for better access?

As previously pointed out, there are regional differences in decision making concerning funding between the Länder. The organisation of the decision about the allocation of the conditions and funds and the decision about the type of support for specific pupils differs from Land to Land. In some Länder, co-ordinating committees consult together and make a proposal. This proposal forms the basis for the decision by the school administration, under consideration of the particular school law and recommendations of each Land. In some Länder, the funding system for pupils with special educational needs is in a process of changing. The idea is to transfer responsibility from the Land to the district and from the district to the schools in order to enhance the process of integration.

Parents have the right of free decision under consideration of the school law.

If additional funding is needed - more than the normal education funding - the school boards and/or the ministry of social affairs are responsible.

The financing of joint education of pupils with special educational needs has recently been changed: joint education of disabled pupils is accepted as “facilitation of integration”, in accordance to the Federal Social Security Act and the Law of Children and Adults Welfare. In some cases, there is co-financing on the basis of these two laws. However, here there are also differences between the Länder.

Schools in Germany are not free to use special needs funds for different goals,

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because of the financial regulations: different bodies provide the different parts of the costs of education.

### *Effectiveness, efficiency and strategic behaviour*

Concerning these issues there is no information in Germany, since there has not been an evaluation on the federal level yet. However, as pointed out before, there is a movement towards decentralisation: in some Länder the funding system is being debated. It is felt that integration is better enhanced when funding decisions are made on “lower” levels within the educational system. In line with this development, there are also steps being taken in Germany in the direction of a greater autonomy of schools. The school boards have the task to review the quality and effectiveness.

### *Accountability*

Schools are accountable to the school offices/school supervisory authority. Germany has the following system of accountability:

- the parliament controls the government
- the government is responsible for education
- each school elects a parents’ representative on the district level
- from the district level a parents’ representative is elected on government level with the task to advise the minister and to be informed by the government.

In Germany there is a movement towards greater autonomy of schools, school boards should be responsible for the quality of the educational provision.

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## 3.9 Greece

### 3.9.1 Special education

#### *Inclusion/Integration policy*

In Greece, the special education field is an integral and organic part of general education. The current legislation promotes the integration of pupils with special educational needs into the mainstream school system. It provides for the establishment of special classes operating in mainstream schools and the staffing with specialist teachers who administer individualised educational programmes to pupils with learning difficulties and behavioural problems.

Currently, the Ministry of Education and Religious Affairs is in the process of drafting a Bill aimed at defining the legislative framework for Special Education and to integrate pupils with special educational needs into general, vocational and technical education. Under this Bill, measures are taken and services provided at all levels of education. The measures include the development and implementation of special programmes and teaching methods, as well as the improvement of the availability of special materials, instruments and other equipment. The services that are provided include diagnosis, assessment, pedagogical and psychological support, physiotherapy, ergotherapy, speech therapy, advising parents, social work, taking advantage of pupils' free time, transportation and travel and any other service that fosters equal treatment for people with special educational needs.

The special classes and groups are re-named as integration groups, clearly expressing that the main purpose is to support pupils with special educational needs to become fully integrated into mainstream classes by planning and implementing individualised programmes that include long-term and short-term goals.

The Pedagogical Institute is in the process of planning pilot projects in order to improve inclusive education to a large extent throughout the country.

The Special Education Directorate proposed new measures which are contained in the new law on special education. Amongst others, the following interventions are proposed:

1. the integration of pupils with special educational needs into nursery schools from the age of three and the provision of facilities in order to keep these pupils in school after school hours for sport and the development of individual skills
2. the organisation of pre-vocational workshops in addition to education in special schools in order to give pupils an opportunity to develop and cultivate

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- other skills in addition to theoretical knowledge and the creation of technical vocational schools for pupils with special educational needs
3. diagnostic and assessment centres will provide further assistance to pupils with special educational needs and their families and provide support for their classroom teacher as well
  4. the development of educational provision and training for autistic pupils, pupils with visual and hearing impairments, pupils with multiple disabilities, pupils in hospitals and pupils in rehabilitation centres
  5. the support of individualised teaching for pupils with special educational needs in mainstream schools.

### ***Definitions of special educational needs/disability***

According to the law, pupils with special educational needs are regarded as those who have particular difficulties in learning or in adapting to the environment, because of physical, intellectual, psychological, emotional or social impairments. Under the new law, the diagnostic process is assigned to the Centres for Diagnosis, Assessment and Consultative Support (the “KDAY” centres). The purpose of these centres is to offer services in diagnosing, assessing and supporting all pupils and in particular pupils with special educational needs, by promoting and supporting their integration into mainstream schools. Another task is to support, inform, train and raise awareness amongst teachers, parents and society in general.

### ***Provision for pupils with special educational needs***

In Greece, there are about 200 special schools. In 1996/97, the number of special nursery schools was 37 and the number of special primary schools 138. In secondary education there were 11 special schools for general secondary education and four special technical vocational schools. In 1996/97, there were also 660 special classes throughout the country.

Integration is provided through integration groups which are found in mainstream schools and also through inclusive education addressing pupils with special educational needs, either individually or in small groups. The assistance provided to a pupil with special educational needs, the extent and type of adaptations of the mainstream educational programme depend on the pupil's educational as well as other needs. This is implemented through a specific educational programme. This compensatory programme covers either the entire programme or certain courses of full-time or part-time study. Integration can also be organised in special schools that share a building with a mainstream school, so

the schools can organise common internal or external educational programmes as well as excursions and cultural activities.

***Number of pupils with special educational needs***

In the following table the numbers of pupils in the different educational settings are presented. It shows that about 1.6 million pupils attend education in Greece, from which less than 1% are regarded as having special educational needs.

	pre-school	primary	lower secondary	higher secondary	techn-voc secondary
<b>special schools</b>					
physically disabled	60	180	87	60	22
hearing impaired	24	254	101	98	35
visually impaired	4	54			
mentally disabled	128	2,326			210
experimental		204			
autistic		7			
total	216	3,025	188	158	267
<b>special groups</b>					
hearing impaired	2				
visually impaired		8			
mentally disabled	39				
total	41	8			
<b>Part-time special classes</b>					
physically disabled		4			
hearing impaired		59			
learning difficulties		8,940			
total		9,003			
mainstream schools	127,947	675,267	674,363	26,900	133,889

The total number of pupils in mainstream schools is 1,638,366. The total number of pupils in special schools and special groups is 3,903 and the total number of pupils in part-time special classes is 9,003. This means that about 13,000 pupils are registered as having special educational needs, which is about

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0.8%. Some pupils are integrated within the mainstream school, so a much smaller percentage than this 0.8% is educated in segregated provision.

### **3.9.2 Financing**

In Greece, the state finances both mainstream primary and secondary education, and special education school units (special classes). The funds for education are registered in the budget of the Ministry of Interior, Public Government and Decentralisation. Every three months, the Minister of Interior decides on the distribution of the funds to the Prefectures (administrative areas). The Prefecture Council of Education distributes the funds on the basis of proposals from the Directors of Education and the Education Committees of each Prefecture to the Organisation of Local Authorities (OTA). The Organisation of Local Authorities accordingly allocates the funds to school committees.

The school committees deal with the operational expenditure of their schools. The school committees consist of representatives from the Municipality or the Commune, and are part of the local Authorities.

The teaching staff of the special education school units receive their regular salary from the state budget, especially from the funds that are registered in the budget of the Ministry of National Education and Religious Affairs, based on the current scale of payment.

Part of the special education expenses (payments, special needs school units, additional payments of teaching staff, travelling expenses, hearing-aids, etc) are funded and settled by the state budget of each regional government of the state's Prefectures, and funded by the Prefectures Local Authorities. Furthermore, the Ministry of National Education grants teaching-aids to the Directorates of Primary and Secondary Education, according to the operational needs of each school.

The Ministry of National Education and Religious Affairs is not involved in the funding procedure of the special education school units and thus is not able to evaluate the current funding system.



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## 3.10 Iceland

### 3.10.1 Special education

#### *Inclusion/Integration policy*

For all levels of education (i.e. from pre-school through to upper secondary school) the education acts state that children/young people with disabilities and/or special educational needs are to attend the same schools as children/young people without disabilities and/or special educational needs.

The law on compulsory education does not mention the concept of special education. However, it does stipulate the right of every child: equivalent access to education for all children and young persons regardless of sex, geographical location or disability. The act states that education must provide knowledge and skills (in partnership with the home environment) and promote the balanced development of pupils into responsible individuals in a democratic society.

The Acts are supplemented by a number of regulations that give further details on how the Acts are to be put into practice. Amongst those are regulations on special needs education and the National Curriculum. The latest revision of the National Curriculum for pre-school, compulsory school (primary school and lower secondary) and upper secondary is currently being published and is to be put into practice from the school year 1999/2000. The main issue in it is the connection and continuity between the different levels of education.

The state and the local authorities have the responsibility for education in Iceland; the local authority for pre-school and the compulsory school and the state for upper secondary education.

The municipal authorities are responsible for the allocation of finances to their schools according to the law on compulsory education. This includes paying for instruction, i.e. general teaching, administration and specialists' services, substitute teaching, special needs education and the teaching of pupils in hospitals, as well as establishing and running schools at the compulsory level. The municipal authorities are elected for four-year terms and formally decide on the allocation of funds for teaching in public primary schools. The municipality can delegate the power of decision to the officials in the local school office. This arrangement is most common in the largest urban areas.

The municipalities are of different sizes and have varying possibilities for obtaining income; the more rural municipalities can therefore receive allocations from the Municipalities Equalisation Fund. Reykjavik, the capital city, is by far the

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largest municipality in Iceland and receives no allocation from the Municipalities Equalisation Fund because of the advantage of its size. In accordance with the regulations on the Municipalities Equalisation Fund, the municipalities are allocated funds according to set rules.

### ***Definitions of special educational needs/disability***

Since there is no mention of special educational needs in the school Acts, it can be concluded that such needs do not exist. This is not the case as can be seen in the general objectives of the law that all children and young persons should receive education according to his/her needs and as far as possible provided in the same environment as all the other children/young persons. At the same time it is recognised that some children/young persons have a need to a change in school environment for a shorter or longer period of time and may therefore be better off in a special class or a special school.

A medical diagnosis does not necessarily indicate what the particular special educational needs are. However, medical diagnoses can contribute to the work done in the schools. As an example children and youngsters that are deaf and hearing impaired can be mentioned. In pre-school there is a special class for sign language users as well as a special school at the compulsory stage. In upper secondary school, a certain grammar school has a special educational facility for deaf pupils. A Communication Centre for deaf and hearing impaired has the responsibility of providing sign language interpreters in upper secondary schools.

Within the regulation on special needs education for compulsory schools (1996), special needs education is defined as teaching that is significantly different in objectives, content, teaching situation and/or methods from the teaching that other pupils of the same age are offered. Special needs education is planned for a longer or shorter period according to the pupil's needs, as needed for the whole time the pupil goes to school. Special education can take place within or outside the mainstream classroom, in a special class or in a special school.

Special education means among other things:

- a. The writing of an education plan for an individual or a group of individuals. The plan is based on information and observation of the pupil's whole situation and the assessment of the pupil's schoolwork and intellectual and physical development. Both long term and short-term plans for the pupil's education are to be made.
- b. Implementation according to the plan
- c. Written reports and evaluation of the education plan and the teaching of it.



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Special needs education is not seen as a separate facility from other teaching - special education is one way of teaching children/young people and can be interpreted within a continuum.

### ***Assessment***

The rule is that a pupil in compulsory school is supposed to attend his/her home school. In the case of a disability in the classical sense and/or special educational need for some other reason, special assistance should be provided.

The referral can be made by the class teacher, the parents, the school health service or by the pupil him/herself in the older age classes. The case is then presented in pupils' protective council, which makes a proposal of what is to be done. It may be the schools' specialist service that does the necessary testing or information is gathered from other specialist services. A recommendation is then made to the head teacher who, in co-operation with parents, makes the decision about an appropriate educational setting. This setting may need extra resources, which the head teacher must apply for to the school service in the local authority.

If the placement is not in the child's home school there has to be an agreement between the parent, the school personnel and the school advisory service that a placement in another school serves the child's needs best in a given situation. The argument for special needs education must be strong to overrule the parents' opinion, if they object to the suggested provision.

### ***Provision for pupils with special educational needs***

Special education is arranged in different ways:

- a. With special assistance within his/her mainstream class in his/her home school. The pupil remains in his/her class in his/her home school with extra resources organised in the form of extra teaching in different subjects, reading, mathematics or in the form of assistance in activities for daily life.
- b. With exchange hours within the class. The pupil receives special needs education in the same subjects as the other pupils, but in a different way within the classroom.
- c. With individual instruction outside his/her mainstream class or in special groups (part time or full time). The pupil is part time in his/her home class and part time in a special class.
- d. In a special class within a mainstream school or in a special school. The pupil can also be moved to another mainstream school in the same community. The pupil is in a special class within the mainstream school or in a special school.

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e. Elsewhere if that is the most appropriate provision, at home or in an institution.

A child/young person has the right to special needs education if the parents, teachers and the schools' specialist team agree that a certain special needs education provision is appropriate at any given time. The head teacher is expected to initiate the provision in co-operation with the parents. If there is a disagreement about the provision the case is referred to the local authority for decision.

Special classes exist for pupils with autism, visual disability and temporary classes for pupils with mild learning difficulties and behavioural difficulties.

### ***Number of pupils with special educational needs***

In Iceland approximately 18% of the school population in compulsory school receives special instruction for a longer or shorter period each school year. In the school year 1997-98, the situation as reported in a case study by the OECD/CERI (1999), is that in mainstream classes on a group education plan 10% are in mainstream class, but on an individual education plan in special classes 0.5%. In the school year 1997-98, there were 165 pupils in special schools which is appropriately 0.4% of the school population.

Those schools serve sign language users, pupils with severe and mild intellectual delay and one school serves a pupil psychiatric hospital.

The percentage of pupils full time outside the mainstream can thus be estimated as lying well below 0.9 %.

### **3.10.2 Financing**

#### ***General situation***

The total budget for a local municipality's public services comes principally from three sources: real estate taxes, the Municipalities Equalisation Fund and income taxes. In addition, the municipal government receives income from its own assets, operations and institutions that are operated on behalf of the public, such as water utilities, electric utilities, hot water utilities, etc. Contributions from the Municipalities Equalisation Fund are being considered to equalise the expenditure needs of the various municipalities with special attention to their size, including equalising the pay costs of the municipalities for primary (compulsory) school teaching. Municipalities are not obliged to allocate a set proportion of their revenues for schools; on the other hand, they are obliged to see that the schools are run in such a way that their operation fulfils all the applicable legal requirements and the requirements of the National Curriculum Guidelines.



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Allocation of funds to schools for teaching and the work of other employees is dependent first and foremost on the total number of pupils, the age of the pupils, the composition of the student population, the age and number of teachers and the location and type of school. Other factors that are taken into account in allocating funds to individual schools also include the number of pupils with disabilities and the number of immigrant pupils.

All the municipalities except Reykjavik, the capital city, have the right to receive financing from the Municipalities Equalisation Fund. The financial contribution for equalisation for operating compulsory schools is divided into several parts in which contributions are also included for special needs education for the disabled and for instruction for immigrants.

The general contribution from the Equalisation Fund is calculated on the basis of the number of teaching hours in the municipality according to a mathematical model weighted by the amount of the municipal income tax. A general contribution is paid to all municipalities except Reykjavik.

### *Financing of special needs education*

The Municipalities Equalisation Fund is required to pay a contribution to the municipalities because of disabled pupils within compulsory school age. The following two conditions apply to payments to the municipalities:

- a. That the pupil in question is a legal resident of the municipality and his/her disabilities has been diagnosed.
- b. That, when the disability falls within the frame of reference of the Municipalities Equalisation Fund, there is a need for special assistance.

Payments to the municipalities for disabled pupils depend on levels of disability. The same amount is expected to be paid per student with the same degree of disability irrespective of whether the special needs education provided varies from one municipality to another.

The Advisory Committee of the Municipalities Equalisation Fund has set the working rules for deciding the degree of disability in accordance with its type. The type of disability that falls below a defined level should rely on special assistance in the form of a payment to the local authority. The amount allocated to local authorities from the Equalisation Fund for each individual pupil is meant to provide an educational opportunity for the individual pupil.

As mentioned above the amount differs according to medical diagnoses and is in accordance with the amount the individual and his/her family gets from the national security system because of a given disability as described in the Act on the

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Affairs of the Handicapped from 1993. The State Diagnostic Centre has the final say in whether the amount suggested by other specialists is in accordance with the given disability.

When the local authorities make their annual budget they set aside an amount to finance special educational provisions within the municipality. The local authorities can either provide an educational opportunity in the pupil's local school or use the money to buy services in another school in the local community or in another community. This could include a special class or a special school. Communities can share the running of a special class or a special school - in order to do that, local authorities set aside extra money.

The allocation to special needs education of each local authority is calculated as follows: a minimum of 0.25 teaching hours per pupil for the first 1700 pupils in the community and 0.23 teaching hour per pupil after that. This amount is to finance special needs education in mainstream schools, within mainstream classes or in special classes.

In each community the local authority, with the help of head teachers, specialist services, school doctors and other relevant professionals, assess whether there are in the community pupils, that because of disability or for other reasons are in the need of special education.

Within each school the head teacher in co-operation with the class teachers evaluate if there are pupils that need special education. The head teacher submits his special educational plan before the local authority. After the local authority has allocated the amount to be used for special education, each school makes an education plan for an individual, a group or a special class. The plan includes teaching, materials and assistants.

#### *Effectiveness, efficiency and strategic behaviour*

There has been no evaluation in Iceland on these subjects.

#### *Accountability*

The local education office follows the development of pupils that are referred to special educational provision. The pupils and the parents receive an evaluation report at least once a year. If there is a suggestion of altering the provision the same partners who decided upon the provision originally, must agree on the changed plan.



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## 3.11 Ireland

### 3.11.1 Special education

#### *Inclusion/Integration policy*

In the 1995 White Paper on Education, the Government affirmed that its objective would be: to ensure a continuum of provision for special educational needs, ranging from occasional help in the mainstream school to full-time education in a special school or unit, with pupils being enabled to move as necessary and practical from one type of provision to another.

Current Government policy is to encourage the maximum possible level of integration of pupils with special needs into mainstream schools and to put into place the necessary special supports to facilitate this development. It is envisaged that this support would be provided by the appointment of additional resource and learning support teachers in mainstream schools and by the expansion of the visiting teacher service.

The Minister for Education and Science has recently (November 1998) announced a substantial increase in funding for special educational provision in mainstream schools. Pupils with learning disabilities in mainstream schools will, in future, have automatic entitlement to the services of a resource teacher and/or childcare assistants on a full time or part time basis, in accordance with their assessed needs.

#### *The Education Act of 1998*

In the preamble to the Act, there is specific reference to provision for the education of persons with disabilities or special educational needs. A stated objective of the Act is “to give practical effect to the constitutional rights of children, including children who have a disability or other special educational need.” The Act states that the Minister for Education and Science has a function to ensure that support services and a level and quality of education appropriate to their needs and abilities are made available to persons with disabilities or other special educational needs. The support services which the Minister can provide for schools and for pupils with special educational needs and their parents include assessment; psychological, guidance and counselling services; technical aid and equipment; adaptations to buildings to facilitate access and transport; speech and language therapy; early childhood education and continuing education; transport.

Schools are required to use their resources to ensure that the educational

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needs of pupils with disabilities or other special educational needs are identified and provided for. Boards of Management of schools are required to use the resources provided to make reasonable provision and accommodation for pupils with disabilities or other special educational needs.

Boards of Management are also required to publish the policy of the school concerning admission to and participation by pupils with disabilities or other special educational needs. The School Plan will state the measures the school proposes to achieve equality of access and participation in the school by pupils with disabilities or other special educational needs.

Under the Act, the Minister is empowered to make regulations relating to access to schools and centres for education for pupils with disabilities or other special educational need.

### ***Definitions of special educational needs/disability***

Pupils with special educational needs are defined as “...those whose disabilities and/or circumstances prevent or hinder them from benefiting adequately from the education which is normally provided for pupils of the same age” (Report of special education review committee, 1993).

Special education is defined as “.. any educational provision which is designed to cater for pupils with special educational needs and is additional to or different from the provision which is generally made for pupils of the same age.” Educational integration is defined as “...the participation of pupils with disabilities in school activities with other pupils, to the maximum extent which is consistent with the broader overall interests of both the pupils with disabilities and the other pupils in the class/group.”

Special education provision is made in special schools/units/classes for the following groups/categories: young offenders, children at risk, pupils with emotional/behavioural difficulties, pupils with physical disabilities, hearing impaired pupils, visually impaired pupils, children of travellers, multiply disabled pupils, pupils with specific learning disabilities, pupils with specific language disorders, pupils with autism, pupils with mild learning disabilities, pupils with moderate learning disabilities, severely emotionally disturbed pupils, pupils with severe/profound learning disabilities.

Pupils with learning disabilities are categorised as follows:

Borderline mild learning disability	IQ range 71-80
Mild learning disability	IQ range 50-70

Moderate learning disability	IQ range 35-49
Severe learning disability	IQ range 20-34
Profound learning disability	< 20 IQ

### ***Assessment***

Regional Health Boards have responsibility for the delivery and co-ordination of assessment, advisory and support services for pre-school pupils with disabilities. These services are provided directly by the Health Boards or by grant-aided voluntary organisations.

Psychologists employed by the Department of Education and Science carry out psychological assessments of pupils with special needs as part of their duties, but most psychological assessments in the primary years are conducted by psychologists employed by non-statutory voluntary agencies. These agencies are generally associated with or attached to centres or special schools for pupils with significant learning disabilities. Psychological assessments are also conducted by psychologists employed by Health Boards and by the National Rehabilitation Board.

Pupils are referred to special needs education services, in either special or mainstream schools, on the basis of a psychological assessment and recommendation. Pupils in need of remedial or learning support, that is those who are defined as:

“..those pupils in mainstream first-level and second-level mainstream schools who have clearly observable difficulties in acquiring basic skills in literacy and/or numeracy, or who have difficulties in learning of a more general nature” are not required to undergo psychological assessment to have access to additional specialised tuition by a remedial/learning support teacher. This is a school decision, normally based on the results of standardised tests in reading and mathematics.

Enrolment of pupils in special schools, in special classes and in resource services is the responsibility of boards of management of schools. This responsibility is usually delegated to principal teachers or to admissions committees.

No pupil can be admitted to a special school, special class or resource service without a referral from a psychologist. The Department of Education and Science, through its Inspectorate, monitors this process.

### ***Provision for pupils with special educational needs***

In the next table the categories of special schools, the number of special schools in each category and the total number of pupils in schools are presented.

	Schools	N of pupils
for pupils with mild learning disabilities	30	3,053
for pupils with moderate learning disabilities	33	2,348
Residential schools for young offenders	5	149
Non-residential schools for pupils at risk	5	98
Residential care units for pupils with emotional/behavioural difficulties	3	10
for emotionally disturbed pupils	14	463
Hospital schools for physically disabled pupils	5	107
for physically disabled pupils	7	277
for hearing impaired pupils	5	368
for children of travelling families	4	199
for multiply disabled pupils	1	42
for visually impaired pupils	2	77
for pupils with a specific learning disability	4	281
for severely emotionally disturbed pupils	1	2
for pupils with severe/profound learning disabilities	3	90
<b>TOTAL</b>	<b>122</b>	<b>7,564</b>

In addition, special classes are quite common in Ireland. In the next table the categories and numbers of special classes are given.

*In first level schools:*

	Special Classes	N of pupils
for pupils with mild learning disabilities	258	2,284
for pupils with moderate learning disabilities	23	97
for pupils with severe/profound learning disabilities	1	6
for pupils with specific learning disabilities	6	60
for pupils with specific language disorders	35	302
for pupils with emotional/behavioural disturbances	1	10
for pupils with autism	34	200
for pupils with hearing impairments	12	47
for pupils with visual impairments	2	16
for pupils with physical disabilities	2	11
Asperger's Syndrome	1	6
multiple disabilities	5	60

	Special Classes	N of pupils
severe emotional disturbances	2	12
special classes for travellers	324	4,300
total	715	7,411

It is further estimated that about 900 pupils with special educational needs are educated in special classes in post-primary schools. This would result in about 16,000 pupils in special schools or (part-time) special classes in Ireland (within the 4-18 years age group) and slightly less (about 15,000) in the compulsory schooling age (6 to 15).

In Ireland there are about 1,600 remedial/learning support teachers (1,250 in first level schools, 350 in second level schools), 180 resource teachers (70 in first level and 110 in second level schools). Furthermore, 63 visiting teachers support visually-impaired and hearing-impaired pupils, some pupils with learning disabilities, including pupils with Down's Syndrome and pupils of travelling families in both first-level and second-level schools.

### ***Number of pupils with special educational needs***

The current total school population of those between 6 and 15 is 607,886. With regard to the number of pupils being educated in special schools and in special classes at both primary and post-primary levels (say 15,000), it can be estimated that about 2.5% of the total population aged 6 to 15 years is registered as having special educational needs. It is impossible to assess how many of these pupils are educated outside the mainstream, but experiences within the Inspectorate lead to the conclusion that about 50% of the pupils that follow (part-time) special classes could be considered as integrated: they follow more than half of the school day education within mainstream classes. This results in a percentage of about 1.8% of pupils educated within separate provision.

### **3.11.2 Financing**

#### ***Financing of special needs education***

Funds for mainstream schools for special needs provision consist of salaries and travelling and subsistence expenses of remedial/learning support teachers, resource teachers, visiting teachers; salaries of special needs assistants; start-up and annual grants for materials and equipment; special equipment grants for

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computers, braille-facilities, radio aids and so on.

Funding for special schools and special classes consists of salaries of full-time and part-time teachers in special schools, salaries of special class teachers, special needs assistants; start-up and annual grants, capitation grants, provision of special transport, wages of bus escorts, special equipment grants. The source of funding is the central government.

### *Decision making processes concerning funding of special education*

The Department of Education and Science makes application for annual budgets to the Department of Finance. No one section of the Department of Education and Science administers the special needs education budget. For example, the Payments Section submits an application for salaries for a projected number of teachers, in both mainstream and special schools. The Planning/Building Section deals with building/equipping of all schools. The Special Education Section makes application for the following:

- Special equipment grants for mainstream and special schools.
- Funds for teaching/child care assistants
- Part-time teachers
- Travelling/subsistence expenses for remedial, resource and visiting teachers

The process could be described as essentially demand-driven. Enhanced capitation grants are paid to schools in respect of pupils with special educational needs in special schools and special classes. A differential system of special grants is operated. This is based on categories and levels of learning disability and special educational need.

The key statement made recently by the Minister for Education and Science in November, 1998, regarding automatic entitlement of pupils in mainstream schools who have special educational needs to teaching and childcare resources underpins the Government's commitment to encouraging the maximum participation of these pupils in the mainstream schooling system.

Changes in the funding system are not being contemplated at present.

In the case of mainstream schools, the Boards of Management make applications to the Department of Education and Science for resources (remedial, resource, special class teachers, teaching/child care assistants, and materials/equipment grants). Inspectors investigate these applications at primary level; at post-primary the Psychological Service fulfills this role. They make recommendations to the Department, based on the level of assessed need and their professional judgement. The Department considers these recommendations



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(mainly via the Special Education Section, but in some instances other sections such as the Planning/Building Section may be involved). It decides, through its administrators, on approving applications and allocating resources.

Up to very recent times, decisions made by administrators were very much influenced by the availability of resources. The situation regarding allocation of special needs education funding to mainstream schools has now changed, with the announcement of automatic entitlement to resources.

The payment of enhanced capitation grants to pupils in special schools and classes is automatic and is based on annual returns of enrolment figures to the Department. Special education funding, in the form of teaching and pupil care resources and grants for materials and resources, is distributed on the understanding that the resources will be targeted towards pupils for whose special educational needs the application was made.

The decision-makers, administrators within the Department of Education and Science, have a good deal of autonomy within overall budgetary limits. However, their operations and decisions are subject to scrutiny by a number of national agencies, i.e. the Public Accounts Committee of the Oireachtas (The National Parliament), the Controller and Auditor General's Office, the Ombudsman.

Recommendations on the level and type of special education support needed by a pupil may be made by psychologists employed by a voluntary organisation, by psychologists employed by regional health boards, or by psychologists or inspectors employed by the Department of Education and Science. These recommendations are subject to the approval of the Department's administrators, who give official sanction for the allocation of resources.

Special schools have a degree of flexibility in the deployment of teaching staff within schools. For example, they may choose to designate one of the teaching staff as a resource person. Resource teachers appointed to mainstream schools are required to work with the pupil population who have special educational needs. They may not be used as class teachers.

Remedial/learning support teachers have a wider remit and are supposed to function in an advisory capacity, as well as giving tuition with learning difficulties in language and/or mathematics. They may not be used as class teachers.

Specialised equipment grants allocated to both mainstream and special schools are required to be spent on the purchase of the specialised equipment recommended and requested.

Schools have flexibility in the use of start-up and annual grants for materials and equipment, but usually spend the funds on the target population.

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The enhanced capitation grants paid in respect of pupils in special schools and special classes are paid directly to Boards of Management. These grants are enhanced in order to compensate special schools and classes for the cost of providing of maintaining large schools buildings that accommodate far fewer pupils than would be accommodated in a mainstream school of the same physical size. The Board of Management has responsibility for the allocation of funds within schools. In practice, Boards consult with principal teachers, who have day-to-day responsibility for the running of schools.

There is generally no great difficulty in integrating special needs funding into existing general education funding systems. Most of the general education funding, over 80%, is spent on teachers' salaries and the same systems are used to pay class/subject teachers and teachers in special education. The other major area of expenditure, capital building, is again administered by the same administrative section in respect of both mainstream and special education.

There are barriers to using special education funds in relation to other funding systems (socially disadvantaged pupils, minority groups) because resources allocated are required to be targeted on particular groups. For example, an urban school may have a resource teacher, a learning support teacher and a resource teacher for travellers. Officially, these teachers are supposed to work only with designated pupils, with pupils with learning difficulties in language/mathematics, or with pupils with more serious learning disabilities or with travellers. As these teachers work mainly on a classroom withdrawal basis, their operations can have a disruptive effect on the day-to-day organisation of classes.

There are no regional differences in decision-making concerning funding for special needs education needs in Ireland.

### *Effectiveness, efficiency and strategic behaviour*

There has been no evaluation of the relationship between the type of funding and integration or inclusion in Ireland. The funding system, prior to the recent decision that pupils with special educational needs in mainstream schools will have an automatic entitlement to resources, could have influenced integration negatively. It can be anticipated that this new decision will have a very positive effect and will facilitate an integration policy.

### *Efficiency*

The current system is highly centralised, with no intervening layers of bureaucracy between the Department of Education and Science and schools. Funds



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reach target groups efficiently.

A major part of expenditure on diagnosis/assessment of special educational needs is incurred by Regional Health Boards and does not come out of the National Education Budget. A certain amount of money is spent on litigation, but this is very small, in terms of the overall education budget.

### *Strategic behaviour*

Up to fairly recent times, the comparative lack of resources for special educational needs in mainstream schools, including special classes and resource teachers, meant that pupils with special educational needs were mainly concentrated in special schools.

Over the last number of years, there has been a great deal of demand from organised parents' groups, special interest groups, teachers' organisations and the community in general, for an increase in the number of remedial/learning support teachers, resource teachers and specialist teachers, for childcare/teaching assistants, for the expansion of the psychological service of the Department of Education and Science and for specialised equipment in mainstream schools.

There has been an increasing tendency to seek assistance from the courts to force the State to provide new and additional resources and individual parents have been supported by lobby organisations in this, with a good deal of success. Demands for additional resources for education, including special education, are a major feature in general elections and by-elections.

It could be anticipated that the recent announcement about automatic entitlement will reduce public demands, but that pressure will be maintained by teachers' unions and lobby groups for improved pre-service and in-service education in general and specific areas of special needs education for teachers in both mainstream and special schools, for the provision of more teachers and for the reduction of pupil-teacher ratios in both mainstream and special schools.

In general, it could be anticipated that there will be a greater move towards enrolment/retention of pupils with special educational needs in mainstream schools.

There are no regional differences concerning the distribution resources for special education. However, in the case of areas of low and scattered population, responses - such as provision of special transport and the travelling/subsistence costs of visiting teachers - can be more costly.

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### *Accountability*

Generally, schools do not have to report to others how finances for pupils with special educational needs are spent, except in cases of selective/random audits of school accounts by the Department. School inspection does not generally focus on issues such as expenditure of special needs education funds.

Boards of Management keep accounts of expenditure and would be accountable to the Department of Education and Science. However, in practice, schools have a great deal of autonomy in relation to using special needs education funds. In the case of requests for specialised equipment that are not covered by annual grants, these are subject to approval by the Department, through its Inspectorate.

There is evaluation of the performance of individual special schools and special classes in mainstream schools throughout the process of Schools Inspection. This procedure does not encompass the notion of value for money, but is focused on how well the schools and classes meet the needs of the pupils enrolled in them.

There are no existing systems through which parents can learn about special needs provision in schools. No specific information leaflets/brochures have been published. Parents are generally unaware of available facilities and may be left to find out for themselves what exactly is available for their children in particular areas. They may get information from voluntary organisations, national associations of parents, and specialised interest groups, such as those representing parents of children with autism, Asperger's syndrome, Down's Syndrome etc.

They do not have access to information about the results of special needs education provision in schools, other than to specific information given to them by schools about the progress of their own children.

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## 3.12 Italy

### 3.12.1 Special education

#### ***Inclusion/Integration policy***

The current policy concerning special educational needs is full integration of pupils with special educational needs. This integration policy has been practised for almost twenty years, since the enactment of two legal provisions in 1976 and 1977. During the following years the intent to place pupils with special educational needs in mainstream schools has increased progressively. This has found its realisation in the Law of 1992 (Law 104, 5th of February 1992). This law represents the most complete intervention concerning the interest of disabled pupils' rights made by the Italian State. The law insists on the need to test the capacities of the pupils with special educational needs as a condition for defining their educational needs and the development of their abilities.

The Ministry of Public Education provides:

- the organisation of educational activities with flexibility in the setting of the classes in order to implement the school programme.
- guaranteed continuity in education between school levels. This requires a close collaboration between teachers at different levels.

Integration of pupils with special educational needs in mainstream units and classes of every kind and level of education means cutting down the number of pupils of that unit or class. For placement in mainstream classes, the psycho-physical development of the pupils is more important than his or her age. Special curricula based on pupils' individual abilities are allowed.

A group of experts in school integration advises the Provincial Director of Education and each school. They collaborate with local authorities and with the local health authority in drawing up a plan to implement individual education programmes and other activities concerning integration of pupils with special educational needs.

#### ***Definitions of special educational needs/disability***

A person is called "disabled" when her/his physical, psychological or sensory disability is steady or progressive, when it causes difficulties in learning, relationships or integration into working life and when it is serious enough to give rise to social disadvantage or social exclusion. A single or multiple disability is considered as serious when, taking into account the age of the person, it

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diminishes personal autonomy, thus requiring the provision of permanent assistance.

### ***Assessment***

The Local Health Authority has the task of evaluating, through special medical commissions, the disability and the general ability of the child as well as the need for permanent assistance. The commissions include a social worker and an expert on the particular kind of disability, both of them employed by the Local Health Authorities.

### ***Provision for pupils with special educational needs***

In the age range from birth to three, pupils with special educational needs are guaranteed a place in nursery schools; from three to six they are guaranteed a place in kindergartens, and from six to fourteen (the compulsory age range is from six to fourteen), pupils with special educational needs are guaranteed a place and education in mainstream classes in mainstream education. Pupils with special educational needs who have completed compulsory education are guaranteed admission into mainstream classes of post-compulsory secondary schools and when they have completed this they are guaranteed access to higher education: universities and other institutions of higher education.

Educational integration focuses upon the development of the pupil's potential in learning, communication, building relationships and socialising. Pupils with difficulties in learning and difficulties related to their disability have the right to study, just like all other pupils.

Pupils with special educational needs, who are temporarily unable to go to school for health reasons are also guaranteed education. The provincial Director of Education arranges mainstream classes for these pupils in hospitals, as detached units of state schools.

School integration of pupils with special educational needs into mainstream units and classes of any kind and level of education, is achieved through a co-ordinated plan of school services, health and social assistance, cultural, recreation and sport centres as well as through activities managed by public or private bodies.

Technical equipment and educational instruments are supplied to schools and universities.

In the different levels of compulsory education, one support teacher is provided for every four disabled pupils. However, this ratio can be changed in primary schools when there are pupils with particularly serious disabilities on the basis of

their functional diagnosis, or when schools are situated in the mountains, or on little islands.

Although full integration of pupils with special educational needs is the current policy, there are also schools for blind and schools for deaf and speech impaired. Blind and deaf and speech impaired pupils can complete their compulsory education in mainstream schools as well as in special schools. Furthermore, there are schools with particular goals for the special education of disabled minors and minors with difficulties.

### ***Number of pupils with special educational needs***

In Italy, there is no detailed information available about the number of pupils with special educational needs and whether they receive education in special groups, special classes or special schools. However, the number of segregated special schools is known. Recent information revealed that there exists about 25 of these separate special schools. The information is detailed in the following table:

special schools	for the blind	for deaf and speech impaired
primary schools	5	6
lower secondary	12	3

Earlier assessments on the number of pupils with special educational needs revealed that in 1990 about 1.3% (about 108,000 of more than 8.5 million of the total population) were identified as having special educational needs (OECD, 1995). The majority of these were educated in mainstream schools. Given the low number of special schools, the total population with special educational needs that is placed in segregated settings can be estimated at below 0.5%.

### **3.12.2 Financing**

#### ***Decision making processes concerning funding of special education***

Special needs provisions in compulsory education is based on a detailed plan for the use of state funds. The circular of the Ministry of Public Education of 1996 provides the Provincial Education Office and each school with the orientation for the investments of special needs funds. The Ministry of Public Education allocates the funds for special needs, according to the law of 1992 to the Provincial Education Offices with territorial competence, which transfer the funds to each single state compulsory school. The law of 1992 represents the State's commitment

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concerning assistance, integration and protection of pupils with special needs. The funds are distributed according to the requests of the Provincial Education Offices. These requests take into account the information provided by the schools.

Schools are obliged to transmit a form to the Provincial Education Office containing the diagnosis formulated by the Local Health Authority for each disabled pupil. The form must be integrated with the Individualised Educational Project that qualifies the formative offer in the schools according to the needs of each disabled pupil. The funds vary according to the number of disadvantaged pupils and to the seriousness of their disabilities. Schools must report the funds they receive in their budget and record under different headings the incomes and expenditures.

The Local Health Authority is responsible for drawing up a diagnosis that has to define and indicate the seriousness of the disability.

Special didactic instruments and materials are financed according to the Law of 1993. Each school can also apply for extraordinary contributions from the Local Authority.

The ministerial circular of 1996 stipulates that funds must be dedicated to teacher training, new experimental projects and the purchase of technical and educational equipment, in order to facilitate the integration of pupils with special needs. A part of the funds can be distributed to experts in the field of special education.

The teacher council has a particular power for implementing all initiatives in support of disabled pupils. The school-cluster for primary education and the school councils for lower secondary education make these deliberations effective.

### *Effectiveness, efficiency and strategic behaviour*

The relation between the type of funding and integration of disabled pupils has not been evaluated in Italy. It is assumed that successful integration can not only be attributed to the funding system, which is designed to support previous political decisions aimed at integration.

Funds are allocated at the central level, on an objective base. The law precisely defines the role of the different institutions that operate in the field of school integration. Therefore, wrong and non-homogenous use of the allocated funds are not accepted as the distribution of the funds takes place by a distribution mechanism with no space for strategic behaviour. As a result, there are no regional differences concerning the resources of special needs.



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### *Accountability*

The provincial Education Offices and their financial departments monitor the use of funds. They can request an inspection held by the provincial work group for disabilities which has been instituted in every Provincial Education Office, and which is composed of a technical inspector, teachers and experts of the Local Health Authority. The Provincial Offices pass all information and the financial report to the Ministry of Public Education. The Ministry carries out further checks and provides an evaluation of the progress in special needs education every year. All documents and the evaluation are checked by the Special Needs Permanent Observatory.

This procedure also applies to special and atypical schools. Only the evaluation of the allocation of funds is different, because it is carried out by the auditors who are generally officials of the financial state administration.

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## 3.13 Luxembourg

### 3.13.1 Special education

#### *Inclusion/Integration policy*

In Luxembourg the management of schools is rather centralised. The essential decisions are made at the national level:

- laws and orders are prepared in the Ministry of Education
- national curricula, school books, time schedules and the organisation of school holidays are worked out by working groups and confirmed by the Minister of Education
- the budget and the management of post-primary schools are of the competence of the Minister of Education
- the budget and the management of pre-primary and primary schools are of the competence of the local authorities (communal council) and under the supervision of school inspectors

Compulsory school goes from the age of 4 to 15 years: 2 years of pre-primary schooling (classes préscolaires), 6 years of primary schooling (école primaire) and 3 years of post-primary schooling (enseignement postprimaire). In fact, early education is generalised in all the communes of the country for children of 3 years. It is not yet compulsory, but may become compulsory, if the necessary structures are developed everywhere.

Until 1994, under the law of 1973, pupils with intellectual, physical, perceptual and severe behavioural disabilities were admitted into special schools, either in regional or specific (for one disability) schools. As a result of the law of 28th June 1994 a major change occurred. The law was modified as follows: the Government (not local authorities) was now responsible for the education of pupils with special educational needs, who could not follow the curriculum in mainstream schools. Pupils with special educational needs could now be admitted into special schools or mainstream schools. When pupils are integrated into mainstream schools, they can now rely upon support given by an external resource service.

Pupils with special needs therefore have the possibility to education from a specialised centre or the mainstream school system, with or without support given by the special national resource service (SREA). The law of 1994 allows parents to decide between to main possibilities for their child with special needs:

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- specialised school
  - inclusion

The parents' will has to be respected by professionals. In fact more and more parents opt for the inclusion of their child with special educational needs in the mainstream school and ask for a specific support in the compulsory school system.

The budget of the national resource service (SREA) increases from year to year. This rise shows the political will to generate more and more inclusive schooling. A very recent paper concerning teacher training published by the Ministry of Education suggests the extension of the training period for pre-primary and primary teachers from 6 to 8 semesters with a compulsory special training period of 2 semesters. This shows again the political will to train all teachers for the work with pupils with special educational needs.

### ***Definitions of special educational needs/ disability and assessment***

The law distinguishes between motor, intellectual, perceptive, behavioural and speech disabilities. The diagnosis of the child's problems is incumbent on a team of medical practitioner, pedagogue and psychologist. A commission, national or regional, (commission médico-psycho-pédagogique nationale ou régionale) makes the proposal for the parents about the school placement of their child. Parents may accept or refuse this proposal.

Local or national commissions submit a purpose to the parents, who may decide what they think to be the best solution for their child. Between the two major solutions (special school or inclusion), a lot of intermediate solutions may be suggested: special school with integration for a few hours a week, mainstream school with admission for several activities in a special school, part-time inclusion in mainstream schools with private sequences of therapy, etc.

### ***Provision for pupils with special educational needs***

The law of 1973 promoted the creation of specialised centres, depending upon the department of special needs education (Education différenciée). As the Ministry of Education - in fact the 'Ministère aux Handicapés et aux Accidentés de la Vie' - intends to encourage inclusion of pupils with special educational needs in mainstream schooling (law 1994), the Service Ré-Educatif Ambulatoire (SREA) was created to allow the support of pupils with special educational needs in mainstream classes.

If parents want inclusive education for their child, they have to ask for it from the different services. Finally each pupil with special educational needs is sent to

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the SREA where a report about their special needs is sent to a local or national commission, which has to agree with the proposal in the report.

A pupil can benefit from a maximum of 8 hours support a week, given by a professional of the SREA. Together with the classroom teacher the professional elaborates an individual educational plan for the child. This plan is sent to the parents for agreement. At the end of the school year a meeting is held between all the concerned persons where the plan is evaluated. New interventions can be generated, but have to be agreed by the commission. This model is functioning in the whole country. All the support is given by the professionals of the SREA, according to the same model: parental request - report of the SREA about the child's needs - commission - decision of parents - support in the classroom - individual plan - meetings with all the concerned persons - continuation of the support if needed.

Placement in one of the 18 special schools is the other alternative. These special schools can be divided, according to their specific specialisation, into different categories:

- visual impairment
- motor (brain damage)
- speech impairment
- behavioural troubles
- autism
- learning difficulty

These schools are situated in the different regions of the country and receive approximately 600 pupils (about 1% of the whole school population).

### ***Number of pupils with special educational needs***

About 55,000 pupils are educated in compulsory education in Luxembourg. Of these about 1,200 are registered as pupils having special educational needs (2.2%). Of these, about 600 pupils are educated in special schools (1.1%). At least the same number of pupils are actually supported by the SREA in mainstream schools. Most of them attend mainstream schools full-time although part-time arrangements are possible. About 100 professionals, trained in special education, support the 600 integrated pupils (1.1% of the whole school population). The support professional generally works in the classroom with the pupil with special educational needs in a small group. An individual educational plan is designed for each pupil with special educational needs.

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### 3.13.2 Financing

#### *Financing of special needs education*

In specialised schools, as well as for the resource service (SREA), the support is free of charge for the parents. The Government provides gratuitously the didactical material. Travelling to specialised schools is also free. Local authorities sometimes participate in meeting the costs of the specific needs of pupils in their community.

#### *Decision making processes concerning funding of special education*

Each responsible person of a special school or the SREA has to establish a budget proposal for the next calendar year during the running school year. This proposal is sent to the director of the department of special needs who forwards all the proposals to the financial services and authorities. These authorities then evaluate the proposals. In a budget meeting the director of the department of special needs has to defend the proposals of the different responsible persons.

A global budget proposal is then calculated and included in the budget law project that is discussed by the Chamber of deputies. The budget of the department of special needs is in fact a part of the national budget. Pupils with special needs can profit from the budget only if the SREA (or other commissions) makes a proposal to assist the pupil.

There are no differences in the decision making process for the different regions of the country, as funding is a part of the national budget.

The special needs education budget is nationally organised and school directors don't have the money in a school account, but may spend within the frame of their allowed budget, bills to be paid by the special school department.

#### *Effectiveness, efficiency and strategic behaviour*

An evaluation that is now taking place and which is organised by the university of Mons, Belgium, will provide answers to different questions concerning effectiveness, efficiency and strategic behaviour. However, at the moment such data is not yet available.

Generally the funds reach target groups without lots of bureaucracy. Other procedures (assessment) are budgeted for within other frameworks.

#### *Accountability*

Schools don't have to report to others upon how funds for special needs

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education are spent. At the end of a school year, the directors of the schools and of the SREA have to present a final report about the work done during the year to the director of the department of special education. School inspectors are not involved, neither are parents, who are involved in the decision making of their child's school career but not really in special needs provision.

As a favourite interlocutor with the minister, a national association of "Parents and Teachers for Integration" however can ask globally for more funding for special needs education.

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## 3.14 The Netherlands

### 3.14.1 Special education

#### *Inclusion/Integration policy*

In the Netherlands, special needs education was originally regulated through special legislation under the Primary Education Act of 1920. In 1967, the Special Education Decree was issued, which specified regulations for schools for special education. In 1985, this Decree was replaced by the Interim Act for Special Education and Secondary Special Education (ISOVSO). This Interim Act encompasses a period of ten years, but due to recent discussions on integration in the Netherlands, definite legislation will not comprise a new, separate special education act.

The educational system in the Netherlands consists of mainstream schools and special schools. Since the 1960s, Dutch special needs education has developed into a wide-ranging system for pupils who cannot keep up in mainstream schools. For a long time, this highly differentiated and extensive special needs education system was seen as an expression of the concern for pupils with special educational needs. Nowadays, a growing group of policy makers, educators and parents think segregation in education has gone too far. A gradually increasing number of parents want their child with special educational needs to attend a mainstream school, so the child will receive as normal schooling as possible.

The first step towards integration was the Primary School Act of 1985. This Act stated that the major goal of primary schools is to offer appropriate instruction to all pupils aged from four to 12 and to guarantee all pupils an uninterrupted school career. Ideally, each pupil would receive the instruction that fits their unique educational needs. If primary schools were able to offer this so-called adaptive instruction, the number of special educational needs pupils was expected to decrease more or less spontaneously. However, in the years after 1985, the expansion of special needs education did not stop.

In 1990 a new government policy document, "Together to School Again" (the so-called WSNS policy), was intended to make a fresh start in integrating pupils with special educational needs. Under this policy, all primary schools and the former special schools for pupils with learning difficulties and for pupils with mild mental impairments have been grouped into regional clusters. Extra funding was available to set up these school clusters. The money is earmarked for extra staff with the specific task of offering help to pupils with special educational needs. As a result of this policy,

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mainstream and special schools began to work together; special educational needs co-ordinators were appointed in every mainstream school, training programmes were launched, new legislation passed, and regulations for new funding of the schools in the clusters were drawn up. The regulations for the two types of special schools are no longer part of special legislation, but fall under the new primary education law.

Each of the 250 school clusters will be funded equally, based on the total enrolment in primary education. About 50% of this amount will be transferred directly to existing special provisions and the other half will be allocated to the school cluster. This is implemented from 1998 onwards and in 2003 the new funding structure should be fully operational. By that time, regions will have to adapt their special needs education provision to the new funding structure. Some regions may have to close special schools - where there was a high degree of segregated provisions compared to other regions - whilst other areas may receive additional funds.

The point is whether these two main resources will foster the government objective of integrating special and mainstream education. The setting up of school clusters will not directly result in a less segregated system: much more is needed. However, it must be said that without the necessary facilities (in terms of extra specialist help/time/attention) integration has little chance of succeeding. In this sense, introducing school clusters and a new funding structure can be regarded as necessary preconditions for integration.

For schools providing secondary education for pupils with learning difficulties, a restructuring of lower forms of mainstream secondary education ((I)VBO and MAVO) and secondary special needs education has been proposed, resulting in four types of instructional programmes.

1. a theoretical programme focusing on transition to higher forms of secondary education
2. a practical programme focusing on transition to vocational training
3. a mixture of both theoretical and practical programmes
4. a labour market oriented programme

Alongside these four programmes, an individual support structure will be developed. In line with the integration policy for the primary special schools, schools for the lower forms of secondary education and schools for secondary special needs education have to work together in school clusters, starting from January 1999 onwards.

For the education of pupils with sensory, physical, mental impairments or behavioural problems a separate line of policy development has recently been



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started. Until now, these pupils could only receive the support they needed after admittance to a full-time special school. Recent government reports propose that the financing mechanism (funding special schools on the basis of the number of pupils that are placed) should be stopped in favour of linking financing of special services to the pupil involved, regardless of the type of schooling. The idea is to change from supply-oriented financing to demand-oriented financing. If a pupil meets the criteria for this so-called pupil-bound budget, parents and pupils can choose a school - special or mainstream - and take part in deciding how to use the funding. Since in this model funding follows the pupil instead of the pupil following the funds, the policy is known as the “back-pack policy”.

### ***Definitions of special educational needs/disability***

The Dutch educational system distinguishes at present 10 types of special education:

Deaf

Hearing impaired

Pupils with severe speech disorders

Blind and partially sighted

Physically disabled

Chronically ill

Severely maladjusted

Multiply disabled

Pupils in schools attached to paedological institutes

Pupils with severe learning difficulties

Next to these there are the so-called “special schools for elementary education” - schools for pupils with learning difficulties and mild mental impairments. Although separate schools, they are no longer regarded as part of the special needs education system and are the subject of general education legislation.

### ***Assessment***

In general, the admission board of the special school (a psychologist, a physician, a social worker, the school principal) performs an extensive assessment in order to decide whether the pupil is eligible for special education. Two years after the admittance, a re-examination has to take place. The goals of this re-examination are the assessment of the results of the education, of how the further development of the pupil’s capacities can be realised and whether the pupil should be transferred to mainstream education or another type of special education.

For decades, the assessment of a pupil's difficulties focused on a classification of the kind of disability. Basically, the division into different types of special needs education can be interpreted as a consequence of the psycho-medical paradigm. Now, assessment increasingly focuses on the description of the problem a pupil has in the educational setting and assessment is always connected with the perspective of taking decisions about special support.

### ***Provision for pupils with special educational needs***

As pointed out before, the system for special needs education in the Netherlands consists of 10 different types of schools for special needs education and two types of special schools for elementary education.

	schools
Learning difficulties	334
Mild mental impairments	328
Deaf	9
Hearing impaired	31
Pupils with severe speech disorders	2
Blind and partially sighted	4
Physically impaired	29
Chronically ill	36
Severely maladjusted	69
Multiple impaired	19
Pupils in schools attached to pedagogical institutes	11
Severely mental impairments	103
Total number of separate schools	975

Currently, these twelve types of provision take place in separate schools, but a type of special needs education can also be provided in a department attached to another type of special education. Due to the policy initiatives taken, it is expected that the percentage of pupils in separate special schools will reduce.

Next to this separate system for pupils with educational needs, there are also some examples of provisions that strive for, or support mainstream integration of pupils with special educational needs. The *first example* is visiting teacher supervision. Visiting teacher supervision (or ambulant teaching) supports pupils that return from special needs education to a mainstream school and pupils who are eligible for special needs education, but have not been referred to the separate



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special school system. A special needs education teacher can offer the mainstream education teacher and the pupil the support necessary for an adequate education in a mainstream school. These facilities are used to an increasing extent.

About 7,000 pupils made use of the provision of visiting teaching in 1998. Research showed that visiting teaching can be a valuable instrument for improving the relationship between special and mainstream education. Moreover, most pupils receiving visiting teaching do perform according to expectations, or even better.

A *second example* of integration is the growing number of pupils with Down's syndrome in mainstream education. This growth is fully due to activities of parents' organisations. Parents want their children with Down's syndrome to attend mainstream schools. Although Dutch mainstream schools do not have to accept these pupils, an increasing number of mainstream schools accept the placement as a new challenge. The Dutch government has followed this development by providing extra support in mainstream education.

A *third example* of innovation towards integration consists of the local projects, such as projects aimed at more intensive co-operation between mainstream and special education, projects aimed at thematic subjects such as referral and placement and projects dealing with returning pupils from special to mainstream education. An example of a local project is the Part-Time Special Group (PTSG) developed by a mainstream school. The PTSG aims at providing individual educational arrangements in order to prevent referral. A PTSG pupil spends roughly half of his/her time in the mainstream group, still belonging to his/her mainstream class. The PTSG can be considered as a part-time pull out model, but its segregation effects are small compared with referring pupils to full-time special schools. The school, the teachers, the children and their parents seem fairly content with the PTSG.

### ***Number of pupils with special educational needs***

In the compulsory age range (5 - 16 years) 4.9% of all pupils attend special needs education in a separate school. Of course, these figures vary across age groups: in the age group of 10 - 11 years more than 7% of the pupils are placed in the separate schools.

Within the age group of 4 - 19 years old, about 4% of all pupils follow education in a separate setting. Compared to 1990, this is a considerable growth: in 1990 about 3.4% of all pupils in the same population attended special schools. In 1980 this was a mere 2.3%. Recent figures show that the percentage of pupils in separate settings still shows some growth.

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The large majority of pupils with special educational needs consists of pupils with learning difficulties and pupils with mild mental impairments. These two groups (including the departments for younger children) cater for about 70% of all pupils with special needs: 2.8% of all pupils attend these two school types. Thus, most of the pupils belong to the group of learning difficulties (1.5%) and mild mental impairments (1.3%). The other groups count for relative small percentages: severe learning difficulties (0.3%) and severely maladjusted or behavioural problems (0.3%). All the other types of disability count for 0.1% or less.

### **3.14.2 Financing**

#### *Financing of special needs education*

Funding for special needs in the Netherlands is largely provided by the central government. The municipalities are responsible for the costs of transporting pupils with special needs to school and for making buildings accessible for these pupils. The current system for funding special needs education is fairly straight forward, the number of teachers provided, including the head teacher, is based on the number of pupils a school has on a particular date. Each of the types of special schools is allocated a certain amount of teacher minutes per number of pupils. The age and the type of special needs of the pupils involved are relevant in the calculations. Different types of special schools receive different budgets. The number of teacher minutes also differs for secondary special needs education and for subject teachers. Additional funding is available for schools with minorities for whom Dutch is the second language, and for specific categories of pupils placed in mainstream education. Similar regulations exist for assessing the number of non-teaching staff. It is obvious that admitting more pupils leads to an increase in staff.

The number of special needs pupils in a special school depends largely on the referral policies of the mainstream schools and the placement policy of a special school's admission board.

The funding for special needs education in mainstream schools is limited. Mainstream schools receive some formation budget for pupils that fall under provisions for visiting teaching. For pupils with sensory, mental and/or physical impairments there is some funding for mainstream school placement (without visiting teaching). Annually, the mainstream school has to apply for additional formation and working expenses for meeting the needs of these pupils. The amount granted depends on the number of applications submitted (AFB - additional formation policy - for mainstream schools).



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### *Policy initiatives on funding*

As mentioned before about two-thirds of the special schools are involved in the WSNS policy. Under this policy clusters of special and mainstream primary schools work together with the aim of integrating pupils with special needs in mainstream schools and reducing the number of pupils referred to special education. Extra funding is available depending on the number of “ordinary pupils” (DFL 28,-) and the number of special schools (DFL 5,000,- per school). This funding is earmarked for improving the provisions for pupils with special needs. The idea is that schools use these funds for working collaboratively. The funds are not made available at cluster level, but at school board level.

For the education of pupils with sensory, physical, mental impairments or behavioural problems, it is proposed that the financing mechanism (funding special schools on the basis of the number of pupils that are placed) should be stopped in favour of linking financing of special services to the pupil involved, regardless of the type of schooling. If a pupil meets the criteria for this so-called pupil-bound budget, parents and pupils can choose a school - special or mainstream - and take part in deciding how to use the funding.

### *Decision making processes concerning funding of special education*

The previously mentioned basic funding structure is fairly easy, but over the years numerous additional rules and regulations have been introduced. Every year in October, each special school submits an overview of the total number of pupils, their type of special needs, age, plus other characteristics such as ethnic minority and level of schooling of the parents. The government uses this information for calculating funding for staffing (formation budget) and all other working expenses including housing, heating, teaching materials, and insurance-costs (LONDO budget). Budgets are made available directly to the school board. It is quite common to buy services such as school psychology, speech therapy, physiotherapy and medical care from other institutions. It is not allowed to use this budget for other working expenses.

The LONDO budget is forwarded to the school as a lump sum. The school board is free to decide how to spend these funds. It is even possible to use the funds for hiring staff on a project basis. Furthermore, the government provides an additional formation budget and a budget for travel, administration and teaching materials for visiting teaching: the support provided by the special school for mainstream schools educating pupils with special needs. The amount of funding and the duration of funding for these pupils depends on the type of disability, the age of the

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pupil and (level of) the former school.

For exceptional situations that fall outside existing regulations, special schools can apply for additional resources. The government then applies the so-called “additional formation policy” (AFB) to fund the reported problems in the schools. The AFB budget is limited.

In addition to the funding by the Ministry of Education, the Ministry of Social Affairs and social insurance organisations occasionally cater for specific equipment in schools and/or for adjustments to buildings for special needs pupils.

### *Effectiveness, efficiency and strategic behaviour*

Until recently, Dutch educational legislation stimulated the development of a segregated system. Additional teacher or pupil support is only available for pupils labelled as eligible for special needs education and then placed in a segregated setting. Mainstream schools are not restricted in referring pupils to special schools and special schools receive more money when more pupils are referred. Mainstream schools do not receive much additional funding for a lot of extra work when the school integrates pupils with special needs.

There are several indications that the integration policy leads to strategic behaviour that is opposed to integration. In general, neither the special nor the mainstream school gains by integrating pupils with special needs into mainstream schools. The Dutch experience is that an integration policy is doomed to fail and may even contribute to segregation if it is not regulated properly financially.

Nowadays, funding systems are being changed drastically in the Netherlands and are more in line with the integration policy.

### *Accountability*

From time to time, an inspectorate monitors schools’ annual reports by carefully counting all pupils, checking their disabilities and age ranges etc. Although the report on which all funding is based is made by the school itself, it is unlikely that schools would try to present unjustifiable data. In order to be able to use the formation budget, school directors draw up a formation plan, which needs the formal approval of the school’s participatory council, consisting of parents and teachers. Finally the actual spending of both the formation budget and the LONDO budget is checked afterwards by government accountants.

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## 3.15 Norway

### 3.15.1 Special education

#### *Inclusion/Integration policy*

The Norwegian government determines the objectives and establishes the framework for education. A common national standard is ensured by means of legislation and a national curriculum. Each county has a national educational office, which carries out central government functions and acts as a body of appeal for decisions concerning individual pupils. In recent years a considerable amount of responsibility has been transferred from central to local government. The municipalities are responsible for the running and the administration of primary and lower secondary schools and the counties for upper secondary schools.

Since 1975, there has been no specific legislation regarding the field of special education. The Educational Act makes each municipality responsible for providing education for all pupils who are residents in the municipality regardless of their abilities. All pupils are registered at their local school and all have the right to receive instruction adapted to their individual abilities and aptitudes.

The municipalities may organise special needs education inside or outside the mainstream school, but the main principle in Norwegian school policy is that pupils with special educational needs are to be integrated into the mainstream school. Special needs education should be provided in accordance with the principles of integration, participation and decentralisation. The Educational Act also states that the municipalities must provide an educational psychological service.

Although the official policy has been integration for more than 20 years, Norway had 40 national schools for special needs education until 1992. Since 1991, a re-organisation of special needs education has been taking place. A main objective of the re-organisation has been to change from a system of special schools to a system of full integration. An important element of the re-organisation is that 20 of the former national special schools have been changed into resource centres. Another important element is the five-year research programme (1993-1998) that aims at defining measures and services to be developed in order to give all learners a high quality education in their own community. In addition, a research and development programme has begun with emphasis upon strengthening the educational-psychological service at the community level.

In 1996 and 1997, this re-organisation of special needs education was

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evaluated. Based on this evaluation the ministry in March 1998 submitted a White paper to the Parliament with suggestions on how special needs education should be organised in the future. From August 1999 there will be a reduction of personnel resources in the National Resource Centres and a corresponding increase in the local Educational - Psychological offices. The policy is that the support must be available where the pupil is - in the municipalities' mainstream schools.

### ***Definitions of special educational needs/disability***

The term "special needs education" is used for pupils who are unable to follow the mainstream course of studies. Pupils with special educational needs are not categorised in the law nor in the curriculum. The national resource centres and to some extent also special teacher training are organised according to categories that are leftover from the old special school system:

- visual impairments
- hearing impairments
- physical impairments
- communication and speech impairments
- behavioural and emotional disorders
- specific learning disabilities
- severe learning disabilities

In practical work with pupils with special educational needs, there has been a shift from the use of medical diagnosis to a description of how a pupil functions. Special needs education should be based on the possibilities within the pupil's abilities rather than focused on weaknesses. A "disability" is described as a discrepancy between the capabilities of the individual and the functions demanded of him or her by society in areas which are essential to the establishment of independence and a social life. This means that changes in society may reduce a person's disability.

### ***Assessment***

The overall aim is to identify children with special educational needs as early as possible. All local health centres co-operate with the educational-psychological service centres, so many children with special educational needs are identified before they start school.

Health service, kindergartens, schools and parents can ask the educational-psychological service centre for help. Before the centre can write an expert report about the child's needs, the parents have to give their written approval. The expert



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report has to contain reasons why a pupil needs special education and describes the content of the special education, the extent and how the education ought to be organised. The school then works out an individual plan. This plan must take into consideration the advice of the educational psychological service centre, but also adapt the special needs education to the curriculum taught to the rest of the class. The expert report gives advice to the municipality on how the measures taken for the pupil can ensure that he or she will get an equivalent education to that of pupils without special educational needs. If the municipality has professional reasons for not following the advice, these reasons must be documented.

As special needs education is decided by an individual decision, parents can make a complaint at the National educational offices if they are not satisfied with the special education provided for their child.

### ***Provision for pupils with special educational needs***

For the majority of pupils with special educational needs, special education is provided at the mainstream school to which the pupil belongs, most often within his or her own class. The pupils may also be taught in small groups together with other pupils with special educational needs, or individually. For many pupils a combination of these organisational models is practised.

Until 1992, Norway had 40 national schools for special education. As a part of the re-organisation of special education, 20 have been closed and 20 of the former national special schools have been changed into state resource centres. There are resource centres for pupils with certain disabilities including visual and hearing impairment, dyslexia, behavioural and emotional disorders, severe learning difficulties and mental disabilities. In collaboration with the Ministry of Health and Social Affairs, four regional resource centres have been established for persons born both deaf and blind. An autism programme and a national resource centre for MBD/ADHD, Tourette's Syndrome and Narcolepsy have also been started. For Northern Norway, a special development programme has been initiated.

The support system for mainstream schools consists of the educational psychological services (285) in the municipalities and the 20 national resource centres.

### ***Number of pupils with special educational needs***

The national average of pupils receiving special needs education after an individual decision is about 6.5%. However, there are variations between counties and municipalities concerning how many pupils receive special needs education

after an individual decision (1.6% to 19%). The variations do not reflect differences in the incidence of special educational needs, but differences in organisation of provisions on a regional level. Schools with a lot of variation in pedagogical methods include more pupils in the mainstream class education.

In Norway, in 1996 about 0.5% of all pupils (7 - 15 years) followed special needs education in special classes in mainstream school, or in special schools. The total number of pupils from seven to 15 years old is 478,500; of these about 31,000 receive some form of special education. Only a small number of pupils are educated in special classes (n = 654) or special schools (n = 2,099).

Pupils with special educational needs in segregated provision are placed in the following types of school:

	No of pupils
specific schools and environmental schools	431
municipality schools for social and emotional problems	202
municipality schools for severe learning difficulties	1,065
schools in child care institutions	130
schools in institutions for drug addicts and alcoholics	46
national schools for deaf and deaf-blind	203
national schools for learning difficulties	22
total number of pupils in special schools	2,099

These statistics show that very few pupils with special educational needs receive their education outside the mainstream school system. In the big cities and in densely populated municipalities special classes, and municipal special schools are more common than in areas with a scattered population.

### **3.15.2 Financing**

#### *General situation*

All public and, to a certain extent, private education is subsidised by the Central Government. In 1986, a major step towards decentralisation of decision making was taken. The former earmarking of grants was replaced by a system where the municipalities receive a lump sum covering all Central Government subsidies for education and culture as well as health services. The most important sources of financing municipal services are taxation (50%), Central Government transfers



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(40%), and fees and charges (10%). The General Purpose Grants scheme takes into account and equalises variations in expenditure requirements between municipalities. With regards to education, the most important criteria is “part of the population aged 1 - 15”. Education in public institutions is provided free of charge, in compulsory education textbooks are also free of charge.

### *Financing of special needs education*

There is no separate national funding system for special needs education. The municipalities have responsibility for all pupils in their area. The municipal authorities divide the grants, taking into account the number of pupils and classes and the number of pupils with special educational needs registered during the previous school year. The resources allocated to the school are to cover adapted instruction in the form of divided classes, a two-teacher system, individual lessons and group teaching. If a municipality chooses to have a special school, it has to be financed within the mainstream municipal school budget. Approximately 20% of the municipal school budget is spent on special education.

There are no regional differences in the type of sources of funds for special education.

There is no special financing system for educational material for special education. Teaching material is financed through the municipal school budget. Some municipalities allocate all resources for educational purposes to the schools, and the school principal decides how the money will be spent. In other municipalities, the schools have to apply for special material and equipment from the municipal authorities.

Stays at the national resource centres for less than twelve weeks per year are free of charge. Some centres have schools for deaf pupils. Payment for these pupils is deducted from the Central Government grants to the municipality.

### *Decision making processes concerning funding of special education*

The municipality makes an individual decision concerning the content and extent of special teaching for the pupil. Some municipalities have delegated this decision to the principals of the schools. It is the school’s responsibility to work out an individual plan, describing the content, extent and organisation of special education and the demand for special educational material and technical equipment.

The educational psychological services do not allocate funds, their role is to assess the pupils’ special needs and to give advice to the municipality based upon

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the principle of equivalency.

The funds allocated by an individual decision cannot be spent in other ways than what is said in the decision. This decision is based on the report of the educational psychological service. This report has to specify any need for individual lessons, group education and so on.

The social security system finances technical equipment i.e. personal computers. Applications for technical equipment must include an expert statement from the educational psychological service explaining why the pupil needs the equipment, and an individual plan for the special education. There is a centre of technical aids in every county.

### *Effectiveness, efficiency and strategic behaviour*

There has been no evaluation of the relationship between the type of funding and integration in Norway. Although a successful integration practice can be attributed to many factors, the Norwegian funding system that is based on the principles of equivalency and covers all pupils in compulsory education can be considered favourable to integration.

It is not possible to document any kind of strategic behaviour of the different groups involved in education. Differences between municipalities are more concerned with the way special needs education is organised than the amount of money that is spent on education.

### *Accountability*

The law states that schools have to report twice a year about the provision for pupils with an individual decision for special education. This report focuses on how the content, the extent and the organisation of special needs education contribute to the goals in the pupil's individual plan.

Furthermore, schools have to report to the national statistics system for primary and lower secondary education how funds are used. These statistics cover the entire educational system in Norway.

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## 3.16 Portugal

### 3.16.1 Special education

#### *Inclusion/Integration policy*

Until the 1970's, the education of pupils with special educational needs in Portugal was provided in specialist institutional settings. A clear policy of integration of pupils with sensory and physical disabilities in mainstream education, started in the middle of the 1970's. During this period a Special Education Service was established in the Ministry of Education. This department has created special education teams - a service mainly composed of itinerant or mobile teachers covering different learning levels - in order to support pupils with disabilities in mainstream schools. However, it was only after the publication of the Comprehensive Law for Education (1986) and with the Decree of 1991, that the legal instruments were established which guarantee the rights and the ways for disabled pupils to access and to be educated in mainstream schools. The comprehensive Law establishes 9 years of compulsory education and states that special needs education is mainly organised in diversified models of integration. In some complex and/or severe situations special needs education can take place in specific institutions.

From 1990 onwards, education has been compulsory for pupils with special educational needs.

Educational support for pupils with special educational needs is the responsibility of the Ministry of Education, although there are still some special schools under the responsibility of the Solidarity and Social Security Ministry (special schools run by private non-profit making organisations). The Ministry of Education has also some agreements with private (profit and non-profit making) special schools. In Portugal, the schools and the support teachers are managed by five Regional Education Directions.

From an historical perspective, the care of pupils with special educational needs has been developed from a segregated into a more integrative approach, with the placement of a large number of special teachers in mainstream schools. These teachers are more and more viewed as an educational support and resource service for mainstream schools. Special institutions are thus being gradually transformed into specific resource centres that offer support to the mainstream education and the social community.

An important law that establishes the principles of special education, is the

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Decree 319/91. This legislation settles that pupils should attend their home schools and establishes their placement in the least restrictive environment. In Portugal, this demands a change of attitudes and realistic measures. The assessment of special educational needs is now education-based. Teachers and the parents gain more influence, they are now a key part of the construction of the pupil's Individual Educational Plan that this law demands. To put this into practice the school must initiate several activities in order to influence positively the process of learning, such as special remedial equipment, special assessment conditions or flexibility of the curriculum. The law establishes that this Individual Education Plan (IEP) is to be developed in co-operation with the Psycho-Pedagogical Services (SPO).

After a long period of reflection and debate, a new law came out in 1997 (Law 105/97). Through this law, the organisation of the answers to special educational needs clearly changed, by placing support teachers as a school-based resource service, working directly with the school boards and co-operating very closely with mainstream teachers, in differentiating educational approaches and strategies in order to improve all pupils' learning processes.

In Portugal, there are now 5,700 support teachers that support one or more mainstream schools and 420 teachers belonging to 187 *co-ordination teams*. The functions of the last group are: to co-ordinate related services and resources in their school area; to detect special educational needs; organise a variety of interventions in order to improve the differentiation of pedagogical practices and adapt the curriculum. At the moment some projects are run by the co-ordination teams in Portugal in order to develop co-operation between local services concerning health, social services, work and private education (with special schools), for example in the field of early intervention, or transition to adult and active life. They also organise training sessions for the support teachers in their area and information sessions open to the community. The school as a whole is now the workplace of "special" teachers.

### ***Definitions of special educational needs/disability***

Until the 1980s, it was a custom to classify disabilities in categories that were based on medical concepts. In the 1980s, the concept of specific educational needs was introduced, classifying disabilities more on an educational basis. Pupils with particular educational needs are described as pupils that demand special resources and/or adaptations in their learning process, showing difficulties in one or more areas of learning - for instance reading, writing or mathematics - that are not the same for the majority of the pupils of their age.

### ***Provision for pupils with special educational needs***

Portugal provides education for pupils with special educational needs both in mainstream school and in special schools. The integrated teaching of pupils with special educational needs is organised by the schools (mainstream teacher, support teacher, educational board). In 1997, there were 187 co-ordination teams, and 115 special schools under the responsibility of the Ministry of Education. Next to these facilities, 69 special schools were managed by the Solidarity and Social Security Ministry. The special schools, under the management of the Ministry of Education are 85 co-operative non-profit making schools and 30 private profit making schools. In special needs education provision, under the direction of the Ministry of Education, almost 6,200 teachers are involved in the support of pupils with special educational needs in mainstream schools.

Although there is a clear integration policy in Portugal, at times special classes emerge within the system, mainly for deaf and multiply disabled pupils.

### ***Number of pupils with special educational needs***

In Portugal in 1997 there were 71,100 pupils with special educational needs in the different provisions, 5.4% of the total population of 1.3 million in the same age group (Source: DAPP, Ministry of Education, Portugal). This number of 1.3 million includes pre-school, basic and secondary education but not technological and technical-professional courses).

Within the model of integrated education, about 64,000 pupils were recognised and had an individual educational plan for their special needs.

The total number of pupils with special educational needs in special schools and institutions is about 6,900 (0.4%), more or less evenly spread over the two involved Ministries.

In the next table the numbers of pupils in the different forms of provision are presented.

Number of pupils with special educational needs across the different services (1997)

	Number of pupils
<b>Ministry of Education</b>	
Mainstream Education	64,133
Co-operatives and associations	1,827
Private profit making institutions	2,063

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## **Solidarity and Social Security Ministry**

Official institutions	1,246
Private Social Solidarity Institutions	1,826
<b>Total</b>	<b>71,095</b>

In the next table the percentages of pupils within the integration model are given across the different categories of special educational needs.

### **Pupils in integrated settings by type of special educational needs (1997/98)**

<b>Total</b>	<b>64,133</b>
of which:	
hearing impairments	3.2%
visual impairments	1.8 %
motor disabilities	4.4%
learning difficulties	72.0%
behavioural problems	5.7%
developmental delays	5.4%
language problems	5.8%
multiple disabilities	1.7%

The data shows that the percentage of pupils with special educational needs, in mainstream schools, is much higher in basic compulsory education (from 6 to 15 years) than in secondary education, or pre-school education.

Compared to 1996/1997 the total number of pupils with special educational needs has dramatically increased: in 1997/98 there were 25,000 pupils more than in 1996. However, the number of pupils in segregated settings remained fairly stable.

The number of special schools remains significant, although with lower numbers of pupils, mainly due to the fact that special schools offer complementary leisure and social activities.

### **3.16.2 Financing**

#### *General situation*

In Portugal, responsibility for special needs education is divided between the



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Ministry of Education and the Solidarity and Social Security Ministry. The regional and central structures of the Ministry of Education and the Social Security Ministry finance the 2nd and 3rd cycles of education (secondary education). The municipalities support the 1st cycle mainstream schools except teachers' salaries. The Solidarity and Social Security Ministry finances separate schools.

### *Financing of special needs education*

The financing model depends on the type of provision a pupil with special educational needs receives. Special schools receive a certain amount of money for each supported pupil. The Co-operatives and Associations receive approximately 630 EUR and the Private Profit Institutions 485 EUR per month per pupil. In integrated teaching, the financial support is mostly indirect and consists of the payment of support teachers, school equipment and technical aids through the programme for structures equipment of the Public Administration (PIDDAC) and financial aids through the Social Education Action that supports pupils with special educational needs by supplying material, food supplements and transport.

In integrated teaching a pupil with special needs costs approximately 210 EUR per month, consisting of 80 EUR that every pupil costs and 130 EUR extra for special needs education.

In the first cycle of Basic Education there is no special funding system for pupils with special educational needs.

### *Decision making processes concerning funding of special education*

The funding is based on the number of pupils with special educational needs. The law establishes the support that is given to special needs education and the financing of integrated teaching, through the confirmation of particular educational needs. Mainstream schools cannot freely use the funds because it consists of support facilities and specific aids and not of a lump sum.

### *Effectiveness, efficiency and strategic behaviour*

Although the educational policy supports integration, the funding system that is based on the number of pupils with special needs stimulates schools to receive more and more pupils with special educational needs in order to increase its financial potential. This mechanism opposes the integration policy. However, there is no relation between the financing system and ways pupils are integrated.

The regional differences in the support concern the existing differences among the regions. Depending on financial possibilities, one region can give more support

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than another.

In general, parents' associations demand more money for support. In mainstream schools, parents of children with special educational needs are less organised and thus have relatively little demanding power.

### *Accountability*

Special schools must present results and reports to the Ministry of Education. Mainstream schools must report on the global financing addressed to the school by the regional and central authorities. The Inspectorate can conduct pedagogical and financial verifications at the mainstream and special schools.

Parents participate in the assessment of the educational process and are informed of the results of their children. However, in general, parents are passive receivers of decisions that are taken by educational agents.

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## 3.17 Spain

### 3.17.1 Special education

#### *Inclusion/Integration policy*

In Spain, the integration of pupils with disability-related special educational needs started with an experimental educational integration programme in 1985. This integration programme covered placement of no more than two pupils with special educational needs per class and the maintenance of a ratio of 20-25 pupils per teacher in groups with pupils with special educational needs. In addition, this programme included preferential attention from the educational and psycho-pedagogical guidance teams (EOEP) and allocation of material resources and extraordinary financial credit lines.

After three academic years, the experiment was evaluated. Since the results were found positive, the programme was extended to a larger number of schools to cover the real demand for education of pupils with special educational needs. In 1995, it was established that all publically funded schools would be obliged to provide education for pupils with special educational needs. Integration is no longer an experimental programme, it has been extended to as many publically funded schools as required, according to pre-planning designed to meet the needs of pupils for educational provision.

Integration covers infant education, primary education, compulsory secondary education, baccalaureate, vocational training and adaptations and reservations of university places. Integration was extended to compulsory secondary education in 1996/97. Another recent innovation is the extension of the term “special educational needs” to highly gifted pupils. Intellectually high achieving pupils are now included within the framework of pupils with special educational needs.

In Spain, the so-called “guide to integration” is used: a document that lists all integration schools and available resources in the area managed by the Ministry of Education and Culture. This guide has recently been updated.

#### *Definitions of special educational needs/disability*

In Spain, pupils with special educational needs are defined as pupils who, for a period during or throughout their schooling, require specific special-purpose educational support and attention as they suffer from physical, intellectual or sensory disabilities, have severe behavioural disorders or are in underprivileged social or cultural situations.

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Seven categories of disabilities are distinguished:

- intellectual
- serious personality disorders/ autism
- vision
- hearing
- motor
- multiple impairment
- highly gifted

### ***Assessment***

Psycho-pedagogical assessment is conducted by educational and psycho-pedagogical guidance teams (EOEP) or by school guidance departments in compulsory secondary education or special schools. The assessment is based upon the pupil's interaction with the contents and materials to be learnt, the teacher, peers in the classroom and school and the family. If a pupil is not in school, the interaction of the pupil with his or her social setting is assessed. Within the assessment different procedures, techniques and instruments are used such as observations, protocols for the assessment of curriculum abilities, questionnaires, psycho-pedagogical tests, interviews, and reviews of schoolwork.

The EOEP issues the “opinion on schooling” that consists of conclusions of the process of psycho-pedagogical assessment, guidance on the proposed curriculum, the opinion of the parents and a reasoned proposal for educational provision, depending on the needs of the pupil and the characteristics and possibilities of the schools in the catchment area. The proposal may refer to special education schools or mainstream schools and is subject to a process of monitoring and periodical review.

After the EOEP issues the “opinion on schooling”, the Educational Inspectorate issues the report. The last step is that the Provincial Directorate, or the educational provision committee, hands down the decision.

### ***Provision for pupils with special educational needs***

Special schools provide education for pupils who, according to the assessment and opinion handed down by EOEP, require significant and extreme adaptations of the official curriculum for which they are eligible on the basis of their age. Special schools provide for pupils whose special educational needs are so complex that they cannot be catered for in a mainstream school and contribute to maximising the quality of life of these pupils.

There are boarding schools to accommodate pupils who live far away from the special education school. The so-called “concerted” special schools are private centres that are financed with public funds. Under some circumstances, in rural areas special classrooms are set up in mainstream schools. These are referred to as special education school substitute classrooms.

In Spain there are about 230 special facilities. They can be categorised as follows:

state special schools (CPEE)	74
special education school substitute classrooms	50
concerted special education schools	97
private special education schools	11

The pupils that have less severe difficulties are educated in mainstream infant/primary and secondary education schools. All publically funded schools are obliged to provide education for pupils with special educational needs, two pupils per class.

The Ministry of Education and Culture provides these schools with human resources who are responsible for providing support to pupils with special educational needs. This group of professionals consists of specialised therapeutic pedagogic teachers, specialised hearing and language teachers, specialised physical education teachers, technical vocational training teachers, assistant technical educators, physiotherapists, nursing officers, educators and doctors.

Some of these professionals are visiting, they are based at one school and serve other schools from there. There are 4,000 specialised therapeutic teachers and specialised hearing and language teachers.

### ***Number of pupils with special educational needs***

The following statistics show the number of pupils with special educational needs that are integrated into mainstream education (1995/96) and the number of pupils that attend special education schools (1995/96).

Number of pupils with special educational needs integrated in mainstream education	
infant/primary	88,405
compulsory sec. education	2,741
baccalaureate	146
BUP/COU	468

vocational training	1,114
soc. guarantee/voc. initiation	324
vocational modules	78
<b>Total</b>	<b>93,276</b>

The majority of these integrated pupils (more than 70%) are labelled as having learning difficulties.

The number of pupils in special education schools is as follows:

	state	private
intellectual difficulties	8,572	256
serious disorders	1,442	105
hearing impairments	732	30
visual impairments	369	-
multiple disabilities	2,618	222
others	5,716	-
<b>Total</b>	<b>19,449</b>	<b>613</b>

The total number of pupils in education is 6,805,822.

On the basis of these figures, one can conclude the following:

- In Spain about 1.7% of all pupils are recognised as having special educational needs
- The majority of these are educated within the mainstream school (1.4%)
- Only 0.3% are educated in segregated settings

### **3.17.2 Financing**

#### *The financing of special needs education and decision making processes concerning funding of special education*

With regard to the financing of schools, three types of schools can be distinguished: state schools, concerted private schools and private schools. The state schools are financed from the National Budget.

From the National Budget, the Ministry of Education and Culture receives its own budget. Within this educational budget, there is a special educational



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expenditure programme. From this budget state special education schools and mainstream integration schools are financed in relation to the staffing of teachers and non-teaching personnel, operating costs and investments. Concerted private schools are financed according to modules established by the number of classes in use. The Ministry of Education pays, by delegated payment the wages of the teaching staff, and apportions part of the budget granted to each school to operating costs and another amount to non-teaching staff. The programme also provides subsidies for private organisations, grants for special needs education and subsidies for private schools that have an educational arrangement with the Ministry of Education and Culture.

The same financing system is used by the Autonomous Communities with full educational power.

Annually, several Ministries (Education and Culture, Labour and Social Affairs) award a wide variety of financial grants for which pupils with special educational needs can apply. Every year, a ministerial order establishes the requirements for grants and subsidies, the headings and amounts of funds and the conditions. The grants that are awarded depend on the credit that is available for the different headings.

School staffing is directly financed by the Ministry of Education and Culture. There are orders that establish the specialist/pupil ratio for educational provision for pupils with special educational needs. These are taken as a reference point for allocating the staff to schools.

Schools receive the funds that cover their operating costs through the Provincial Offices. The schools employ these funds for all operation costs such as the purchase of materials and the payment of services. The funds depend on characteristics of the school: the number and characteristics of pupils, number of specialists at the school, number of classrooms in use, number of pupils using the boarding accommodation, size and the characteristics of the school, maintenance contracts, if appropriate, and travel expenses of specialists working on visiting basis.

The provincial offices receive the budget for furniture and equipment such as computers. The offices make a proposal concerning the needs, which are assessed by the Ministry of Education. The Ministry distributes the budget according to criteria of urgency, need and priority. The same procedure applies for funds for building works.

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## 3.18 Sweden

### 3.18.1 Special education

#### ***Inclusion/Integration policy***

The Swedish Education Act stipulates equal access to equivalent education for all children and young persons, regardless of sex, geographical location and social and economic circumstances. The act states that education must “give the pupils knowledge and skills and in partnership with homes, promote their balanced development into responsible individuals and members of society”. Allowance must be made for pupils with special educational needs. The Education Act is supplemented with special ordinances for various types of schools such as regulations for those with disabilities.

The state and local authorities have the responsibility for education in Sweden. The Swedish parliament and government have defined a national curriculum for compulsory basic schools.

The local authorities receive all financial resources for education and are responsible for the division of these resources. Local authorities are also responsible for running the day-to-day activities of the schools to ensure that these goals are achieved. An education plan has to be adopted, describing how school activities are funded, organised, developed and evaluated. The head teacher of each individual school has the task of drawing up a local working plan based upon curricula, the national objectives and the education plan.

The National Agency for Schools has the task of developing, evaluating, following up and supervising public sector schooling in Sweden as well as putting forward proposals for the development of the schools.

Since the late 1950's, an increasing number of pupils with special educational needs have been integrated into mainstream schools. In 1997, most pupils with special educational needs were taught in mainstream - compulsory basic schools. Within mainstream schools special teaching groups are also organised for pupils with functional impairments and for pupils with social and emotional problems.

There are special schools for deaf and hearing-impaired pupils and for vision impaired and speech or language impaired pupils. Municipalities run a special programme for pupils with severe learning disabilities. Education for these pupils takes place in special classes.



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### ***Definitions of special educational needs/disability***

In Sweden, pupils with various difficulties are considered pupils with special educational needs. The difficulties of pupils are categorised in terms of physical impairments, visual impairments, deaf and hard-of-hearing, deaf-blind, learning difficulties, multiply-disabled, dyslexia, autism, ADHD, speech impairments and medical disabilities.

This attention for medical definitions of problems is changing into a focus on the consequences of the impairment rather than on the impairment itself. Focusing upon the consequences of impairment, one discovers that the problems of everyday life are often the same for different impairments.

In 1980, the World Health Organisation published an analysis that distinguished impairments, disabilities and handicaps. This distinction has, in Sweden, a growing impact within education. It implies that a handicap always has to be defined in terms of the relationship between the individual and his or her environment.

### ***Assessment***

The advisors of The National Swedish Agency for Special Needs Education (SIH) can conduct qualified pedagogical investigations in those cases where local specialists or parents have agreed that investigation is necessary after consulting the advisors. Parents of children in the compulsory age have the right to choose a school their child will attend, within reasonable economic and organisational restrictions.

### ***Provision for pupils with special educational needs***

A pupil who has difficulties following class instruction can receive various forms of support. A remedial teacher can support the pupil in the classroom, or can teach the pupil in a special group outside the classroom. Within compulsory schools special teaching groups can be organised for pupils with functional impairments and for pupils with social and emotional problems.

Municipalities run a special programme for pupils with severe learning disabilities. Education for these pupils takes place in so-called “ordinary” special classes. Pupils who are ill for a longer period can be taught in a hospital or at home. There are special schools for deaf and hearing-impaired pupils and for visually impaired and speech or language impaired pupils. In the next table the types and numbers of special schools in Sweden are given.

Number of special schools (1995/96)	
schools for deaf and hard-of-hearing	5
school for deaf pupils with learning disabilities	1
school for hearing-impaired pupils with behavioural problems or language disorders	1
school for visually impaired with learning disabilities	1

The National Swedish Agency for Special Needs Education (SIH) is responsible for providing special pedagogical support to pupils, parents, schools, and local authorities so that pupils with functional impairments will receive the best possible education. This support focuses on pupils with vision impairments, physical impairments, immigrant pupils with disabilities and pupils with multiple disabilities. The SIH works closely with the hearing clinics at the county hospitals regarding pedagogical support to hearing-impaired pupils.

The prime focus of the special advisors' operations is that they initiate plans and actions that will minimise disabilities. The advisors provide information and support, and develop and evaluate individual action programmes. The advisors can also conduct qualified pedagogical investigations in those cases where local specialists or parents have agreed that investigation is necessary after consulting the advisors. Very often these investigations are followed by professional development of the staff working with the pupil. In addition, the advisors offer supplementary materials such as professional guidance and adapted educational materials.

### ***Number of pupils with special educational needs***

In the next table the numbers of pupils with special educational needs in mainstream and special needs education are given. The data shows that in Sweden there are about 16,000 pupils who are registered as pupils with special educational needs. This is about 1.7% of all pupils of the compulsory age group. Of these 1.7% about 0.8% are educated in the mainstream and 0.9% in a special group/class or school.

#### **Pupils with special educational needs in mainstream education (1995/96)**

blind pupils	95
visually impaired pupils	798
deaf pupils	57

hard-of-hearing pupils	2,318
physically impaired pupils (brain injury)	1,308
physically impaired pupils (other reason)	1,235
Pupils with learning difficulties	
receiving education in the same group as pupils without disabilities	1,043
receiving education in a special group but in mainstream education	305
receiving education on their own but in mainstream education	76
receiving education in a special programme	8,119
Pupils in special school (1995/96)	
deaf and hard-of-hearing pupils	569
deaf pupils with learning disabilities	43
deaf and hard-of-hearing pupils with behavioural or language problems	111
visually impaired with learning disabilities	43
Total number of pupils with special needs	16,120
Total number pupils compulsory school	938,900

### **3.18.2 Financing**

#### *General situation*

There is a long tradition of local government autonomy in Sweden and this tendency has been strengthened in the 1990s. The main principle of the distribution of responsibilities is that the parliament and the government should control educational activities by defining national objectives, while national and local education authorities and the organisers of the different institutions are responsible for ensuring that activities are implemented in line with these national objectives and achieve the necessary results.

Thus, the funding of school-level education is shared between the central and the local governments. The municipal tax revenue is the main income of the local government. As a supplement, the local government receives a state grant, of a dual

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character, consisting of both pure grants as well as tax and structural equalisation. The structural equalisation part is determined by several underlying factors, such as population and structurally related cost differences. For a few years, communities with pronounced social problems and with many immigrants receive special contributions from the state. All this results in regional differences in resources. The funds are not earmarked. Each municipality has the sovereign right to decide on the allocation of resources and the organisation of activities, within its field of responsibility. The national subsidies have changed in the past few years from earmarked subsidies for school budgets to an undifferentiated part of the national subsidies to municipal budgets.

### *Financing of special needs education*

Decentralisation makes it impossible to determine the amount of money that is spent on schools and on pupils with special needs. A growing number of municipalities devolve an overall budget for salaries, the costs of teaching materials and equipment to each school.

In addition to the previously mentioned funds, there are still special state grants for research and development, in-service training for school staff and measures for pupils with learning difficulties and for a number of independent upper secondary schools. Furthermore, the state provides expertise and support concerning pupils with special needs to municipalities and parents through the National Swedish Agency for Special Education (SIH). SIH special advisors can be found at 21 locations throughout the country and there are five Educational Material centres that develop and adapt educational materials. In addition, there are special state-run national schools for hearing-impaired, deaf, and pupils with language problems, whose disabilities prevent them from attending a local school or school program for severely learning disabled.

### *Decision making processes concerning funding of special education*

The way the community's central administration distributes the money can be described as follows:

1. The education board applies for grants by the local government. This is based on demands of the head teachers of the schools after reduction of the demanded sum.
2. The local government grants the funds to the education board after further reduction.
3. The education board decides on the distribution of the money to the schools,



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often with a declaration that the interests of pupils with special educational needs must be looked after as far as possible.

The funds for pupils with special educational needs can be distributed in different ways. Every local education board chooses its own distribution model. The most frequent are:

- no special funds are distributed for pupils with special needs
- the head teacher receives a special pool from the board of education
- the chief education officer receives a special pool from the board of education and distributes it after consulting with head teachers
- the board of education keeps the funds for pupils with special needs and distributes the funds when needs arise

The first two options are recommended by supporters of decentralisation. The other two are supported by people who think the funds must not be split into too many small sums.

### *Effectiveness, efficiency and strategic behaviour*

As integration is realised in Swedish schools, the funding system does not influence integration.

The decentralised system provides opportunities for influence from many groups. To a certain extent this is the intention. However, it can happen that organisations stand up for the interests of their members and this can result in the situation that resources are placed where there are personnel and not necessarily where the pupils with special needs are.

A further issue is the fact that although a far-reaching consulting procedure is positive from a democratic point of view, it naturally takes a long time. Many head teachers complain that their time is spent on negotiations instead of on the development of education and the situation for the pupils.

In Sweden, there is a debate about the system of non-earmarked subsidies. Parents and teachers protest. They think schools receive less money because municipalities use the money that the schools need for other tasks and that pupils with special educational needs have become the most sustained in this system. However it is difficult to determine whether this is the truth.

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# 4 General overview

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## 4.1 Introduction

In this chapter, the findings of the country descriptions in Chapter 3 will be summarised. For the following sections a thematic approach has been chosen corresponding with the main issues of the questionnaire. Initially a theoretical framework that is required for describing the different funding models within countries will be constructed and presented. Then, in 4.3 the different funding systems will be highlighted and in 4.4 the consequences that these different models may have within the member countries will be examined.

## 4.2 Funding models

When thinking about funding regulations, all sorts of topics need to be considered. Funding systems affect the flexibility of schools to make special provision, may necessitate formal identification procedures, may create bureaucracy, raise questions of accountability and (budget) control, affect the position of parents and may promote the need for decentralisation of decision-making processes. Each way of funding special needs provision is expected to have certain positive outcomes. Funding based on lump-sum models seems more flexible and avoids bureaucratic procedures, pupil-bound budget empowers the parents, stimulates accountability and results in equal access to appropriate education.

New funding systems will always be a compromise between all of these aspects. In the following section, a number of these compromises are explored.

### *Parameters in funding models*

Every existing or newly developed funding model can be described with a set of parameters. The literature on funding models (Meijer, Peschar & Scheerens, 1995) used in education, health and care mentions a number of these. They include: the type of means (time, money, materials, training facilities), the destination for the means (parents/pupils, schools, communities, regional institutions), earmarking of the means (yes or no), group or individual based funding, the conditions for funding (input, throughput or output) and the degrees



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of freedom in expenditure (advance budget or declaration based).

Combining the parameters mentioned here results in more than a thousand possible funding models. To decrease the number, the study is confined to the most relevant parameters concerning special needs education funding. Here, two main parameters are used in the analysis: destination locus (who gets the funds) and the conditions (indicators) for funding. These are discussed below.

### *Destination locus*

Generally, this parameter is important in discussions about inclusion. In principle the funds can be allocated in many different ways. In the first place they can be allocated to the clients of the educational system: the pupils and/or parents. Schools can also receive funding. In this respect there are two options: special schools or mainstream schools. Another possibility is to allocate funds to groups of schools or other regional institutions like school advisory centres. Finally, funds can be delegated to municipalities or regions.

### *Funding indicators*

Three main categories of indicators are usually distinguished: *input*, *throughput* and *output* (Meijer, Peschar & Scheerens, 1995). *Input-funding* is when the funding is based for example on the determined need of each of the destination levels, such as the number of special needs pupils in a school, municipality or region. Inputs may also be defined in terms of referral rates, low achievement scores, number of disadvantaged children and so on. The key-point is that funding is based on (expressed or measured) needs.

The second model, *throughput funding*, is based on the functions or tasks that have to be undertaken or developed. It is not based on needs, but rather on the services provided by a school, municipality or region. Finances are allocated on the condition of developing and maintaining certain services. Schools, municipalities or regions are equally treated: funds are based on total enrolment or on other population indicators. Of course in this model certain conditions in terms of output can be put in place, but the funding itself is not based on outputs (or inputs). In addition, control and accountability can play an important role here, as with the other funding models.

In the third option, funds are allocated on the basis of *output*: for example in terms of the number of referred pupils (the lower the number, the more funds) or achievement scores (added value: the higher the achievement scores, the more funds). The output can be defined on the basis of different aggregation levels, as

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pointed out before.

It is clear that these three models have extremely different incentives. A needs based input system entails a bonus for having or formulating needs, an output-based system generates behaviour towards achieving the desired results and the throughput model does not reinforce inputs or outputs, but tries to generate services. Furthermore, the three models may have their own negative side effects as well as unexpected or expected strategic behaviour. For example, an output model may reinforce the referral of pupils with expected low gains in achievement scores to other parts of the system. On the other hand, input funding on the basis of low achievement reinforces low achievement itself: more funds can then be expected. Throughput funding may reinforce inactivity and inertia: whether anything is done or not, funds will be available.

Combinations of different indicators are also possible. Throughput financing can be combined by output control for example. Low outputs may then be used as a possible correction mechanism for the throughput budget for a following period of time.

On the basis of these two parameters it is possible to describe the funding systems in the different countries and to discuss the advantages and disadvantages of these. This will be presented in the following sections.

### **4.3 Finance systems**

Throughout the seventeen countries, different models of the financing of special needs education can be recognised. However, it is impossible to group the participating countries into a few clear categories. In most countries different funding models are used simultaneously for different groups of special needs pupils. Added to that, within the strongly decentralised countries, different funding models are used by the regional authorities. In some countries different ministries (**France** and **Portugal** for example) are involved and this may also result in different approaches to the funding of special education. Finally, the funding of integrated services is usually different from the funding of the special provision in separate settings and it is therefore impossible to characterise a country by one simple formula or funding system.

As a result, the discussion about the different funding models is not based on comparisons between countries, but on comparisons of models. Below, countries are mentioned alongside different funding models, but this should not be interpreted as trying to highlight the countries' main funding model, but as an illustration of the place where the specific model can be found.



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The first model is the model that is currently used in countries with a relatively high proportion of pupils in segregated settings and in which special schools are financed by the central government on the basis of the number of pupils with special needs and the severity of the disability. This model can typically be described as a needs based funding model at the level of the special school. In terms of the theoretical framework used here, this model is an input model: the degree of the need forms the basis of the financing. Governments pay special schools on the basis of their needs. The indicator for “need” here is the number of pupils with special needs. The decision-making processes are mostly organised by regional or school based commissions.

The countries that work with this type of “input-based” funding at the (special) school level are **Austria, Belgium** (both **Flemish** and **French Communities**), **France, Germany, Ireland** and the **Netherlands** also. In countries with relatively low percentages of pupils in special schools or classes, a central needs-based model for the financing of special schools may be used. In, for example **Luxembourg, Spain** and **Sweden** (at least a small part of), the special school system is paid for by the central government on the basis of the number of pupils and their disabilities.

A second model is the model in which the central government allocates the funds to municipalities via a lump sum (with possible corrections for socio-economic differences) and where the municipality has the main responsibility for dividing the funds to lower levels. The first step can be characterised by a throughput model: funds are allocated to municipalities independent of the number of pupils with special needs within those municipalities.

In the second step, needs-based indicators can be used, but also other types of allocation processes may be used. Countries that focus strongly on this type of decentralised special needs funding are **Denmark, Finland, Greece, Iceland, Norway** and **Sweden**. Here, municipalities decide upon the way that special needs education funds should be used and about the degree of the funding. In **Denmark, Iceland, Norway** and **Sweden** the following principle is embedded in the funding system: The more funds municipalities put in separate provision such as special schools or special classes, the less is available for integrated services.

Within the countries where this model can be found, school support centres generally play a decisive role in the allocation procedures (for example in **Denmark** and **Norway**).

As pointed out before, different indicators and procedures can be used within the allocation processes from municipalities to schools: in some countries at this

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stage throughput-models are also used (**Sweden** for example: some municipalities allocate the special needs education funds to schools irrespective of the needs of those schools). However, an indicator for need is mostly used in this stage of the process as well.

In the third model the financing is not delegated to municipalities, but to a higher level of aggregation such as provinces, counties, prefectures, school clusters and so on. In this model the central government funds special needs education indirectly through other layers where the main responsibility lies for special provision. Examples of countries that use this model are **Denmark** (for the more severe special needs), **France** (for integrated services), **Greece** and **Italy**. In the **Netherlands** it has recently been introduced for more milder special needs: the funds for these pupils are allocated to school clusters on the basis of a throughput-model. Clusters that consist of mainstream and special schools receive funds for special provision irrespective of the number of pupils with special needs.

In **England** and **Wales** the responsibility is placed at the local authority (LEA) level, that authority deciding the level of funding it will make available to meet its statutory responsibilities towards pupils with special educational needs.

In some countries, funds are tied to pupils: the budget for special needs education is based on the type of disability and parents can in principle choose where they want to have their child educated. This model of pupil-bound budget can be found in **Austria** (for the certified pupils), **England** and **Wales** (with the statement-procedure), **France** (SEA-procedure) and **Luxembourg**. The system is expected to be introduced in the **Netherlands** (for the more severe needs). This model can be described as an input or needs-based model at the pupil level. The more needs the pupil has, the more funds are connected to him or her.

In a few countries, authorities base part of the funding of special needs education on the belief or assumption that milder forms of special needs are evenly spread over schools. Some other countries believe that every mainstream school requires a certain amount of earmarked special needs funding in order to serve such pupils adequately. In these countries, the funding of (mainstream) schools consists of a fixed budget for special needs education irrespective of the number of pupils with special needs in those schools. This model, at least this part of the finance-model for special education, can be characterised as throughput-funding at a school level. Examples of countries where these approaches to the funding of milder forms of special needs can be found are **Austria** (fixed budget based on the total number of pupils in a school), **Denmark** (some municipalities), and **Sweden** (some municipalities). In the **Netherlands** this throughput-model is



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currently being used for the funding of special needs education (for the milder forms of special needs) at the school cluster level.

The descriptions of the financing of special needs education in the member countries reveal that funding models are strongly in the process of development. In some countries huge changes are to be expected or have recently been implemented. In the **Netherlands**, both the funding of the provision for milder special needs and the provision for the more severe needs is and will be drastically changed. The input-based model at the school level (the special school is funded according to the number of pupils in that school) will be replaced by a throughput-model for the milder special needs (through the funding of school clusters, which has already been implemented) and an input model on pupil level: the pupil bound budget.

In **Austria**, the model of pupil bound budgets is held responsible for the undesired growth of labelling and special needs education budgets and as a hindrance to more emphasis being placed upon prevention.

In **Germany**, the current debate is focussed on the issue of decentralisation and autonomy of schools. It is felt more and more that decentralisation might enhance integrative practices and that more responsibility at lower levels within the educational system could positively influence the policy goal of more inclusion.

In **Ireland**, there has been a recent key statement made by the Minister for Education and Science regarding the automatic entitlement of pupils with special educational needs in mainstream schools to teaching and child care resources. This is regarded as underpinning the Government's commitment to encouraging the maximum participation of pupils with special educational needs in the mainstream schooling system.

In **Belgium (Flemish Community)** the funding system is also being currently debated and in the future new policy interventions can be expected.

#### **4.4 Efficiency, Effectiveness, Strategic Behaviour and Accountability**

The first clear result of this study is that in countries where the finance system is characterised by a direct input-funding model of special schools (more pupils in special schools, more funds), the most negative voices are heard. These countries (for example **Austria**, the **Netherlands**, **Belgium** - both **French** and **Flemish Communities** - and **France**) point to the different forms of strategic behaviour within the educational field (by parents, teachers or other actors). These forms of strategic behaviour may result in less inclusion, more labelling and a rise in costs. A great deal of money is spent on non-educational matters such as litigation,

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diagnostic procedures and so forth. It is not remarkable that these countries identify themselves in the group of countries with relatively higher percentages of pupils with special needs in separate settings.

Quite clearly, some of these countries report that the finance system influences their inclusion policy negatively! For some countries (the **Netherlands** for example) this finding is the main reason for changing the finance system of special needs education drastically.

Other countries also report forms of strategic behaviour. These forms of strategic behaviour can be summarised as follows:

- Parents want as much funding for their child with special needs as possible.
- In addition, special and mainstream schools want as much funding as possible.
- However, schools generally prefer the funds and not the difficult-to-handle pupils.

A second finding is that countries that have a strong decentralised system, where the municipality has the main responsibility for the organisation of special needs education generally report positive effects of their systems. Countries like **Iceland, Norway, Sweden, Finland** and **Denmark** mention almost no negative side effects of their systems and are generally very satisfied with their finance-systems. Systems where the municipalities decide on the basis of information from school support or advisory centres and where the allocation of more funds to separate settings directly influences the amount of funds for mainstream schools, seem to be very effective in terms of achieving inclusion.

However, a negative point is also made by these strongly decentralised countries: regional differences can be quite strong and as a result circumstances can differ for parents with children with special educational needs.

Overall, decentralisation is generally seen as an important pre-requisite for inclusion. Countries such as **Sweden, France** and **Norway** state this more or less explicitly. It is exactly this argument that stimulates the debate for more decentralisation in **Germany** as well.

Pupil bound budgeting, as used in **Austria**, seems to have some clear disadvantages as well. At times mainstream schools are eager to have these pupils (and their budgets) within their walls in order to be able to split the existing classes into smaller ones. However, it is likely that they prefer pupils (with budgets) who do not cause them too much additional work. In addition, parents will always try to get the best for their child and as a result will try to get the highest amounts of special needs funding.



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This pupil bound budget system is certainly not advisable for pupils with milder special needs. Criteria for learning disabilities are vague, ambiguous and changing over time (Walberg, (1993)) and this in itself may be a source of debate if budgets are linked to pupils. In practice, only clear-cut criteria are useful if funds are tied to pupils. If it is not possible to develop these, pupil bound budgets should not be used. Generally it is desirable that funds are spent on special *education* itself (in an inclusive setting), instead of on bureaucratic procedures such as diagnosis, categorisation, appeals and litigation.

It is also interesting that some countries report that the efficiency of their system is rather high (no costs are wasted) and that some of these countries explain this by stating that costs for assessment, diagnosis and litigation are paid from another source than the education budget. It could be considered to be a little strange not to judge these costs as being inherent to the whole finance system. It is quite obvious that these costs should also be taken into consideration when evaluating the finance system within the framework of special needs education. That countries do not consider this as inherent to their educational budgets does not necessarily mean that their procedures are efficient.

With regards to the issue of accountability, it should be noted that in none of the member countries is it common for schools to have to report what they have achieved with their special needs education budgets. Although in some countries inspections are quite usual, these are mostly concerned with the efforts of schools concerning educational arrangements and matters, but rarely with the output of these efforts. The focus is mostly on the type of arrangements and interventions and the way they are carried out, but never on the results that have been achieved.

It could be argued that the evaluation and monitoring procedures within countries could also be improved within the framework of special education. In the first instance it is important to guarantee and to stimulate an efficient and effective spending of public funds. Secondly, it seems necessary to clearly show the clients of the educational systems (pupils with special needs and their parents) that education within the mainstream setting (including all the additional facilities and support) is of a sufficiently high quality. It appears that earmarking of special needs education funds, methods of control and effective monitoring and evaluation form inherent elements of an adequate finance system within the field of special education.

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# 5 Financing and inclusion

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## 5.1 Introduction

In the previous chapters an overview is given of the current state of the art of funding and inclusion in various countries. Not only were the different funding models described, but also a first exploration of the possible advantages and disadvantages of these models were given. In this chapter an attempt will be made to develop an elaborated framework applicable to the area of financing and inclusion. This framework can be used in the debate on financing of special needs education and may serve as a tool for improving finance systems in countries.

First, in 5.2 an overview of possible funding systems is presented. In 5.3 a set of criteria is developed in order to evaluate the different funding systems. In 5.4 the funding models are evaluated on the basis of these criteria. Here, the empirical findings of this study will be made use of and the experiences within the participating countries form the input of the evaluation.

## 5.2 Funding options

As was pointed out in 4.2, two parameters are essential for constructing any funding model: who, or which organisation, receives funding and what are the main conditions for allocation. The following table combines the two parameters and shows how from combining these parameters, 15 different, potential funding models emerge.

Destination Indicator	Parents	Mainstream School	Special School	Municipality	Regional institution
Input	1	2	5	8	11
Throughput	-	3	6	9	12
Output	-	4	7	10	13

*Table 1: Funding options.*



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Two of these, throughput and output funding in relation to parents, are not discussed here. The reason for this is clear: if funds are allocated to parents, they are always based on some sort of an input model in terms of determined needs. It is quite unrealistic to allocate funds to parents independent of a needs indicator. It is even more unrealistic to pay parents with a special needs child on the basis of the output they have achieved with this child. Therefore, 13 different funding models fall within the scope of the discussion here and the main characteristics of each of the models are now described.

1. *Client-based funding*

Funds for special needs are allocated to the clients of the educational system: parents or pupils. With this, different alternatives are possible: funds can be allocated to clients through - variations on - voucher systems or lump sum budgets.

2. *Input funding mainstream schools*

In this model mainstream schools are funded according to needs they have. For example schools with more special needs pupils receive more funds than other schools.

3. *Throughput funding mainstream schools*

Mainstream schools are funded equally with a budget earmarked for special services.

4. *Output funding mainstream schools*

Mainstream schools receive funding on the basis of, for example, higher achievements (value added), for lower numbers of referrals to special needs education or for less “problematic” behaviour among the school population.

5. *Input funding special schools*

Special schools are funded on the basis of the number of pupils enrolled.

6. *Throughput funding special schools*

Special schools are all funded equally for certain provisions, in principle independent of the needs they have, or outputs they achieve. Special schools may operate as a resource centre.

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7. *Output funding special schools*

Special schools are funded on the basis of their achievements, for example in terms of the number of referrals to mainstream school.

8. *Input funding municipalities*

Municipalities are funded on the basis of their needs (in terms of the number of special needs pupils, for example).

9. *Throughput funding municipalities*

See 3 and 6, but here the application is at the level of the municipalities (funded equally).

10. *Output funding municipalities*

Municipalities with higher outputs or lower numbers of special needs pupils receive more funding.

11. *Input funding regional institution*

Regional institutions in the form of advisory centres, school clusters or other institutions are funded on the basis of the needs of the area.

12. *Throughput funding regional institution*

School clusters or other institutions are funded equally (based on the total number of pupils in the cluster or region) for providing certain services.

13. *Output funding regional institution*

Regional institutions (for example school clusters) are financed on the basis of their achieved outcomes.

Of course, not each of the options described here is possible in any given country. A number of these will only be theoretical for particular countries. For instance in some countries the municipality has a dominant role in education, while others have a more centralised educational policy. Although different countries will favour certain funding models in keeping with existing structures, it is relevant to analyse the advantages and disadvantages of each of these models.

### **5.3 Criteria for evaluating funding options**

Any funding model can be evaluated with a given set of criteria. Parrish (1995)

refers to an extensive set of criteria for effective special needs education formulas.

A formula should be:

1. Understandable (clear concepts and procedures)
2. Equitable (districts receive comparable resources for comparable pupils)
3. Adequate (funding is sufficient for providing special programmes)
4. Predictable (allocations are stable and predictable over time)
5. Flexible (maximum latitude in use of resources)
6. Identification and placement neutral (not based on labelling or on type of placement)

Furthermore, special needs education funding formulas should have or result in:

7. Reasonable reporting burden (no excessive “paper hassle”)
8. Fiscal accountability, cost-based and cost control (funds are spent in an authorised manner, funding is linked to the costs but stabilised over time)
9. Outcome accountability (monitoring of outcomes is necessary)
10. Connected to general education funding (integration of funding systems)
11. Political acceptability

Within the area of funding, numerous evaluation studies have been conducted in associated fields and professions. These are particularly relevant to the goals of this study. Aspects of “care” policy have long been debated in terms of financial implications. In such areas, the goals are similar to that of special needs provision: to create a continuum of high quality services for relatively low costs. In all “systems” the client is relatively unsure and actively searches to increase his or her well being.

Three core-criteria appear to emerge from relevant studies: effectiveness, efficiency and legitimacy. Furthermore some practical and organisational criteria are mentioned: how much time does it take to implement a new funding model? What additional - organisational - costs are made? Is the new model technically and practically feasible? What are the practical consequences of a new system? Finally, moral-ethical issues play an important role, as well as the degree to which a new system takes emancipatory viewpoints into account i.e. there are key questions concerning equity, solidarity, accountability and accessibility.

New funding models can be evaluated using diverse criteria. However, it is impossible to do so using all the fore-mentioned criteria. This study is confined to examining the following main criteria:

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1. **Effectiveness** in terms of the achieved goals: improvement of the quality of special education in mainstream settings resulting in fewer special needs pupils in separate settings.
  2. **Efficiency.**  
Funding should be directed as far as possible towards the target group: special needs pupils.
  3. **Immunity against strategic behaviour.** People and organisations may act according to the policy goals, but they also act and behave according to their own set of goals. These may be defined explicitly (helping pupils for example) or implicitly (keeping their jobs). Every person and organisation reveals strategic behaviour. The question is not to prevent this, but to take it into account so that procedures and regulations maximise the fit between strategic behaviour (overt or covert) and policy goals. Otherwise a new policy may result in contra-productive behaviour.

This set of criteria will be used to judge possible new funding systems for special needs education.

#### 5.4 An evaluation of funding options

This section evaluates the 13 different funding options described in 5.2, using the three criteria outlined and developed in the previous section. If a given model scores negatively on one or more of these criteria, it is not elaborated upon here.

##### *Client based funding (1)*

Pupil-bound budgets as used in **Austria, England and Wales** (the statementing procedure) and as proposed in the **Netherlands** fall within the so-called voucher model. It is a needs-driven system in which parents have the authority and the means to decide between options. Pupil-bound budgets enable parents to opt for a mainstream school. The effectiveness of this funding system in making inclusion possible is regarded as high. Pupil-bound budgets are easily accepted by the education community: it seems a good idea to give parents, dependent on the child's needs, the necessary means to realise the appropriate education for their child. In order to allocate a budget, it is essential to have an objective system indicating who is, and who is not, eligible for additional funding.

However, it is clear that objective indication systems do not exist and that makes each decision contestable. Furthermore, pupil-bound budgets may provoke complex diagnostic procedures, protocols and litigation. The acceptance in the



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education community and the contestability of decision-making may lead to a growing demand for budgets (as shown in **England and Wales** and **Austria**). As a financing system, pupil-bound funding risks self-destruction due to its own success.

### *Input funding systems (2, 5, 8 and 11)*

In the mainstream schools model (2) schools with more special needs pupils or higher referral rates receive more funds than others. Another indicator could be the number of pupils with low achievement test scores. This input-model has a “bonus” for defining pupils as having special needs or for referrals to special needs education or for having low-achievers: there is no incentive to improve the quality of services. In general, in terms of the goal of inclusive education, this model rewards ineffective strategic behaviour.

Special schools (5) can be funded on the basis of the number of pupils enrolled, as is now the case in a number of countries. The negative consequences of these type of funding models is well demonstrated by the situation in **Belgium**, **Netherlands** and **Germany** (in some Länder) in which special schools are funded on the basis of the number of pupils they receive (or attract) to their schools. The obvious negative implications of this option have been extensively described.

Municipalities (8) are funded on the basis of their needs (in terms of the number of special needs pupils). Regional institutions (11) can also be funded on the same basis. These funding models reinforce the notion that at the level of the municipality or region, differences in the incidence of special needs reflect real differences in special needs characteristics. This view is contestable and in some countries this has resulted in so called block-funding formulas (New Brunswick in Canada, see Porter, (1997)). In general, there is little evidence to support the idea of strong regional variation in special needs incidence and characteristics. As with model 2, these funding options rewards ineffective strategic behaviour, which should be avoided.

### *Throughput funding systems (3, 6, 9 and 12)*

Mainstream schools (3) are funded equally with a budget earmarked for providing certain special needs provision. However, generally the funding scale is too low to develop school based-provisions. In this option differences in incidence of special needs are neglected. Especially at school level there may be huge differences in distribution of special needs across schools. In addition, schools are

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not prompted to include pupils with special needs - they may be even encouraged to segregate these pupils, since the allowance is independent of their success (Hegarty, (1995)).

In the next throughput model (6), special schools are funded for providing certain services. Special schools may then operate as a resource centre (as for example in **Norway**; see OECD, 1995; UNESCO, 1994).

There are some advantages and some disadvantages to this:

Advantages:

- This model is relatively easy to implement in countries with a relative segregated provision
- Acceptability is probably high
- Costs are predictable and constant
- It may lead to a continuum of provisions where economic decisions play an important (positive) role
- It may result in decreasing numbers of pupils in segregated provision

Disadvantages:

- The quality of education processes is not directly addressed
- Areas with a higher density of special schools are “rewarded” for their “negative” behaviour (referring pupils to special schools) and areas with a clear inclusion policy are “punished”.

Nevertheless, this throughput model focusing upon special schools is a good alternative to the input funding system in segregated systems. This is especially the case when this model is combined with conditions concerning accountability.

With the option of throughput funding of municipalities (9), special needs education funds are directed to the municipalities, not on the basis of the number of special needs pupils or on output indicators, but on the basis of equal financing in order to develop, implement and maintain certain provisions - where possible - in mainstream education. In general this model has the same advantages and disadvantages as the other throughput options, but there are certain differences. Firstly, there is the question of economy of scale. If municipalities are large, equal funding is more justifiable, but if the average size is small, equal funding may be firmly opposed. If the average size is small, then the assumption of equalising regional differences in special needs incidence may lack validity. Moreover, if the economy of scale is small then certain difficulties can be expected in arranging

regional services for special needs (especially for low incidence needs).

An attractive feature of this model - and this is shown quite clearly in the Scandinavian countries - is that it is based on the notion that inclusion is firmly stimulated by decentralisation (see also Porter, 1997). The responsible key persons are easy to access and the communication lines are generally short. Furthermore regional, differences in context, history, philosophy and so on are taken into account.

As shown in the Scandinavian countries, this option may well lead to a continuum of provision where economic decisions play an important (positive) role and it may result in decreasing the number of pupils in segregated provision. The acceptability is probably high in countries with a decentralised education system and where municipalities already have the main responsibility for certain education provisions. Depending on the existing measures of accountability followed by municipalities for education, this model is relatively easy to implement. However, in a country with a more centralised policy this model is not easy to put into practice. This option also needs some incentives to make it a goal-oriented approach. As in other throughput options, stimuli are needed to achieve inclusive settings. Thus, combining this option with elements of output funding could be desirable and effective.

In throughput funding at regional level (12), regional institutions or school clusters are funded equally (based on the number of pupils in the cluster) to provide certain services. The problems of the economy of scale, as pointed out earlier, may be well accounted for in this option. If the region or cluster covers enough pupils, this model has considerable advantages.

An advantage of this model is decentralisation. Regional degrees of freedom are a prerequisite for creating solutions that take differences in history, context and philosophy into account. Furthermore, regional decision-making seems to enhance co-operation and responsibility. In addition, the decision-making process is based on economic elements. This may enhance further efforts towards inclusion. The option of school clusters - as is currently being implemented in the **Netherlands** - seems especially promising (Lunt, Evans, Norwich & Wedell, 1994; OECD, 1995; UNESCO, 1994).

### *Output funding systems (4, 7, 10 and 13)*

Mainstream schools (4) receive funds on the basis of higher achievements (value added), for lower numbers of referrals of special needs pupils or for less "problematic" behaviour of the school population. If this model does not take

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pupils' achievements when entering school into account, this arrangement inevitably encourages schools from taking special needs pupils. However, if a value-added model is implemented to correct for this, there are still certain objections to this output-model: schools may become too test-oriented; it implies additional costs and extra time and the legitimacy is probably low. Furthermore, an output based model may lead to a strong competitive climate among schools which has certain disadvantages for special needs pupils (O'Hanlon, 1993).

Special schools (7) may also be funded according to their achievements. In terms of current inclusion policies this could be based on the number of referrals to mainstream schools. Special schools who succeed in referring more pupils back into mainstream receive more funds. This is a form of "inverse funding" that may lead to undesirable forms of strategic behaviour: the special school with the lowest number of special needs pupils receives the highest funding.

In output models 10 and 13 municipalities or regions (for example school clusters) with higher outputs or lower number of special needs, pupils with needs receive extra funding. The advantages and disadvantages of this type of funding have already been discussed. It should be emphasised that although the incentive structure seems better organised, its acceptability is presumably lower. Furthermore, the same disadvantages of a strong output oriented model as already described, also holds for this option. A throughput model combined with some elements of output funding, however, may be very effective.

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## 6 Conclusions

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**I**n this chapter, a first, but modest, exploration is given of the characteristics that “good” funding models (1) appear to need in terms of achieving the goal that forms the basis of this study: the inclusion of pupils with special educational needs in the mainstream school.

Every funding model has advantages and disadvantages. Nevertheless as painted out in chapter 5, a throughput-model at the regional (municipality) level seems to be the most attractive option, especially if some elements of output funding are incorporated.

In such a model budgets for special needs are delegated at central level to regional institutions (municipalities, districts, school clusters). At regional level it is decided how the money is spent and which pupils should profit from the special services. It is desirable that the institution that decides on the allocation of special needs budgets has or can make use of (independent) expertise in the area of special needs and the tools to implement and maintain strategies and services related to this.

Generally it is desirable that funds are spent on special *education* itself (in an inclusive setting), instead of on bureaucratic procedures such as diagnosis, categorisation, appeals and litigation.

Central to this model is the issue of accountability. The clients of the education system and (in general) the taxpayer have the right to know how funds are spent and the results achieved. Monitoring and evaluation procedures are necessary in the throughput budget system. Within the decentralised regional model the need for these is even higher than in a more centralised option. Independent evaluation of the quality of special needs education is a necessary part of the regional model.

One of the complex tension areas is that on the one hand the labelling and identification of special needs pupils is not in keeping with the desire to include these pupils in mainstream education, but on the other hand, the assessment of the effects of any funding model implies selecting certain pupils within the target group.

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It should be clear that within this context pupils are still labelled and are still in a special position within the mainstream class. This in itself is not inclusive education in the pure sense of the word. Of course, in an inclusive setting differences between pupils are not labelled in terms of special or normal, or included or not. Inclusion starts from the right of all pupils to follow mainstream education. In order to realise this entitlement, education should be based on the differences between pupils: differences between pupils are at the same time the input and output of education.

In line with this position, it is easily recognised that a strong competitive climate within and between schools does not enhance inclusive goals. The importance of the co-operative model needs to be clearly pointed out. There are some promising developments within this perspective: the model of school clusters where schools co-operate at a regional level in order to make their provision as inclusive as possible can be noted. However, this model is still rare and at the moment not yet sufficiently evaluated.

An analysis of several funding models applied in different countries in Europe (please refer to the analysis in 5.4) suggests that the following general principles seems to work well in practice.

In the first step of the allocation process regions are to be treated equally, provided a correction is made for differences in socio-economic composition between regions. There is no evidence that the prevalence of pupils with special educational needs differs between regions when socio-economic differences are already taken into account. Funds can therefore be allocated simply on the basis of total enrolment in primary education or some other population indicator.

Subsequently, the local (or regional) organisation decides how to spend the money and which particular pupils should benefit from the special services. Preferably, this local organisation also holds independent expertise in the area of special needs and is able to implement and maintain strategies and services to provide special needs education to those who require it. Further, if the staff of this local organisation are also regular visitors in mainstream of schools, some control can easily be executed as to the use of funding being provided.

In general, it seems that a combined needs and throughput model is the most attractive option at this local level.

A (smaller and fixed) part of the budget can be allocated to all schools independent of need (based on the assumption that every school has to have at least some facilities to cope with pupils with special needs) and another (flexible and more substantial) part of the budget can be distributed to schools on the basis



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of an independent assessment of need. This seems to be a promising funding model, especially if some elements of output funding is also incorporated. Low output may then be used as a possible correction of the budget for a next period of time. However, some degree of budget stability over years is important.

Inclusion appears to be achieved more easily in a decentralised model in comparison to a centralised approach. In a centrally prescribed plan, too much emphasis may be put on the organisational characteristics of that specific model without inclusive practice being realised in practice. Local organisations with some autonomy may be far better equipped to change the system. Therefore, a decentralised model is likely to be more cost-effective and provide fewer opportunities for undesirable forms of strategic behaviour. Nevertheless, the central government has to clearly specify which goals must be achieved. Decisions concerning the way in which such goals are to be achieved is then left to local organisations.

An important concern in a decentralised system is the issue of accountability. Clients of the education system and taxpayers in general have a right to know how funds are spent and to what end. Accordingly, some kind of monitoring, inspection and evaluation procedures will be inevitable elements of the funding system. The need for monitoring and evaluation is even greater in a decentralised model compared with more centralised options. Independent evaluation of the quality of education for pupils with special needs is therefore part of such a model.

*(1) This section draws upon the work of Waslander & Meijer, (1996).*

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# Appendix A

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Questionnaire “Mapping out data on special needs provision” and “Financing”

## *DATA ON SPECIAL NEEDS PROVISION*

### **1 An overview of the state of the art of integration/inclusion, policy and of legislation and regulations, including:**

- the general situation in your country concerning integration/inclusion policies and practices
- specific promising projects, interesting recent developments, new approaches and recent discussions
- main current problem areas in integration
- current mainstream and special needs education laws and recent developments in policy-making concerning special education, integration or inclusion (including recent proposals to and discussions in Parliament)

Are there any studies dealing with the evaluation of integration/inclusion (or segregation) practices and policies? What are the findings?

### **2 Definitions of special needs/disability, including**

- different categories
- assessment procedures
- referral and placement procedures

### **3 Provision for pupils with special needs, including information concerning:**

- numbers and types of segregated provision (special schools)
- number and types of mainstream arrangements like (part-time or fulltime) special classes, resource rooms, visiting teachers (describe both the number of teachers involved and the type and size of the target groups of the support)

Describe the different integration models and clarify who is responsible for the facilities and support.

#### **4 Number of pupils with special needs** (in compulsory age range)

Link the number of pupils with special needs to the different types of provision as described in 3. Try to combine number of pupils per age-group with type of provision and category of special needs.

Thus, give an overview of the number of pupils with special needs

- per type of provision
- per category of special needs
- per age-group

Do not present percentages but “raw” numbers. Use as recent statistics as possible! Present also the **total** number of pupils (including all pupils: special, mainstream or outside education) **in the same age groups** as the ones you have used for the pupils with special needs.

#### **5 Curriculum and teaching**

- How accessible is the mainstream curriculum for pupils with special educational needs? Upon what evidence are your responses based?
- Describe type of adaptations (in terms of goals, organisation and contents of the curriculum)
- What are the teacher training facilities for special needs education in the mainstream school?
- Are there any special programmes for training focussed on integration/inclusion?
- Does integration influence the organisation or curriculum of teacher training programmes?
- Is there any information about the attitudes of teachers towards integrating pupils with special needs?

#### **6 Special schools**

- What is the contribution of special schools to integration/inclusion?
- How do they cope with their position in the integration process?
- To what extent do special teachers have roles in supporting mainstream schools? Can they cope with their role to support teachers in mainstream schools?

#### **7 Additional topics in relation to special provision and integration or inclusion:**

- What do parents think of integration (attitudes of parents towards integration)?

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What are the main topics concerning the position of parents in relation to special needs education?

- Is there a positive basis in the society for integration?
- Are there any other barriers to integration?

### *FINANCING OF SPECIAL EDUCATION*

#### **1 Description of the sources of funds for special education, including:**

- funds for mainstream schools for special needs provision
- funding of special arrangements like special classes, special schools and so on. Describe both the sources (municipality, institutions, central government and other) and the relative amount of these sources.

#### **2 Description of decision making processes concerning funding of special education.**

Before funds are available for schools, a number of decisions will have been made concerning the amount of funds, the way the funds are allocated and other related issues. Describe the different stages through which the funds are transferred to schools and describe the decision making processes at the different stages before the funds enter schools.

Emphasise the basis of the funding model in your country (financing based on type of special needs or on type of provision or on other indicators).

What is the current thinking and what are the recent developments concerning funding of special needs education in your country? Are changes of the current funding system being discussed? Is this in relation to integration policy? In what terms or contexts?

#### **3 The use of finances within the school**

Are (mainstream and special) schools free to use special needs funds for different goals (materials, methods, specialists, additional teachers and so on)? How flexible is this?

Who decides on the allocation of funds within schools? Describe the procedure. Describe the relation to other funding systems. Is the special needs funding easy to integrate into existing general education funding systems? Are there any (formal or informal) barriers to use these funds flexibly and in relation to other funding systems (general funding, funds for socially disadvantaged pupils, funds for pupils from minority groups)?



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## **4 Effectiveness, efficiency and strategic behaviour**

### **Effectiveness**

Has there been any evaluation of the relation between the type of funding and integration or inclusion in your country? Does the funding system influence integration positively or negatively? What about the effectiveness of the funding system in terms of facilitating an integration policy?

### **Efficiency**

What about the efficiency of the funding system: do the funds reach target groups (pupils with special needs) without lots of bureaucracy? Are significant parts of the budget spent on other procedures (diagnosis/assessment/litigation and so on) rather than to education of pupils with special needs? To what extent?

### **Strategic behaviour**

What kinds of strategic behaviour are the result of your current funding system? Think of behaviour of different groups of actors to use the funding system to the advantage of the own organisation that might not be in accordance with the formal integration policy goals. Analyse all negative effects of your funding system on the level of all the actors that are involved in the decision making process (teachers, principals, professionals, administrators and so on: in sum, all persons who are involved in the different levels in the decision making process).

## **5 Accountability**

Do schools have to report to others how funds for special needs education are spent and with which results? To whom and how? Is there in your country an evaluation of the special needs provision in general and of the spending of special needs funds? What is the role of inspection in this respect? How are parents informed about special needs provision in schools and of the results that are achieved?

# Appendix B

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