

PARTICIPATION IN INCLUSIVE EDUCATION

A Framework for Developing Indicators



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**– A Framework for Developing
Indicators**



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CONTENTS

1. PREFACE	5
2. INTRODUCTION	7
3. POLICY CONTEXT AND KEY ISSUES	12
3.1 Inclusive Education for All.....	12
3.2 Equitable and accountable education systems	14
3.3 Every child counts.....	17
4. DEVELOPING A COMMON FRAMEWORK	20
4.1 Shared definitions	20
4.2 A common framework for organising information.....	20
4.3 Integration of data from diverse sources – enhancing compatibility	24
5. INDICATORS FOR THE AREA OF PARTICIPATION	27
5.1 Indicators on participation	27
5.2 Indicators on participatory policies and practices.....	31
<i>Examples of existing indicators</i>	32
5.3 Indicators on participatory relationships.....	34
<i>Examples of existing indicators</i>	35
6. A POSSIBLE WAY FORWARD: BUILDING THE CAPACITY FOR THE DEVELOPMENT OF COMPARABLE INDICATORS	37
6.1 Need for a common language.....	37
6.2 Five steps to develop new indicators	38
<i>Step 1: Make an inventory of available data</i>	38
<i>Step 2: Identify gaps in available data</i>	39
<i>Step 3: Check whether available data can be aggregated and disaggregated across levels</i>	39
<i>Step 4: Check whether available data can be monitored across the process of education</i>	39



<i>Step 5: Check whether available data respects the interests of the persons behind the data</i>	40
7. CONCLUSION	41
REFERENCES	42
APPENDICES	48
Appendix 1: List of Abbreviations.....	48
Appendix 2: Indicators on participation developed in the first project.....	49
Appendix 3: Taxonomies on vulnerable population groups.....	51
Appendix 4: Taxonomies on health and health-related issues.....	53



1. PREFACE

This report presents the main findings from the second phase of a project conducted by the European Agency for Development in Special Needs Education (the Agency) on the topic of indicators in the area of inclusive education in Europe. The first phase of the project was completed in 2009 and a report was published entitled *Development of a set of indicators – for inclusive education in Europe*.

The aim of the second phase was to build upon the work of the first phase and to develop a model for understanding participation within the context of inclusive education. A systematic approach was taken by developing a framework for participation, analysing existing indicator systems and identifying ways to link various data or information generated at the individual, classroom, school, local and national levels. The project aims to provide a better understanding of the complex issues surrounding how policies and practices can help to ensure participation for children, teachers and parents. This systematic approach could also help to identify gaps in existing indicator systems and propose a way forward for the development of new indicators on participation for inclusive education in Europe.

In order to make data comparable across education systems and countries, the report proposes that a common framework to represent and organise relevant information is required. Rather than working with isolated indicators, a methodology needs to be developed that can accommodate different forms of information, evidence and knowledge generated at different levels of the system.

The report also tries to clarify the difficulties experienced when trying to develop a common set of indicators for all countries. An attempt to develop one set of indicators to be applied to all countries would have been set to fail from the beginning, if it ignored existing practices at national, regional or local level with regard to data collection and data sharing.

Therefore, the project has developed a common framework, methodology and tools and it is the member countries that should provide the information and data that is available in their system and define the domains where common and comparable indicators should be developed.



This endeavour has been complemented by another Agency project named 'Mapping the Implementation of Policy for Inclusive Education (MIPIE)', supported by the European Commission under the Lifelong Learning Programme (Comenius Accompanying Measures Action). The focus of this parallel project, which will be finalised in October 2011, is to take a first step to address the clear need expressed by policy makers for quantitative and in particular qualitative information. The project will explore how relevant information can be identified and collected in the best ways to effectively map the implementation of policy and support inclusive education in a meaningful and applicable way. For further information see: <http://www.european-agency.org/agency-projects/mapping-the-implementation-of-policy-for-inclusive-education>

It is considered that the outcomes of both projects could be used to develop a more detailed research study involving the collection of qualitative and quantitative data that can be used for mapping purposes at the national and European levels.

For the project 'Participation in Inclusive Education – A Framework for Developing Indicators' a small working group was set up to carry out the project activities and to prepare this report. The group members were: Judith Hollenweger, Agency Representative Board member, Switzerland; Martyn Rouse, Emeritus Professor at the School of Education, University of Aberdeen, Scotland, United Kingdom; Mary Kyriazopoulou, Agency staff member and Harald Weber, Agency staff member.

Their input, along with that of Agency Representative Board members and National Co-ordinators, is greatly appreciated. All of their contributions have ensured the success of this Agency project.

More information about the project activities is available from the project web area: <http://www.european-agency.org/agency-projects/indicators-for-inclusive-education>

Cor Meijer

Director

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2. INTRODUCTION

In 2009 the European Agency for Development in Special Needs Education published the *Development of a set of indicators – for inclusive education in Europe* (European Agency, 2009a). The aim of this first project was to develop a methodology that would lead to a set of indicators suitable for monitoring developments at the national level, but that could also be applied at the European level. Based on the consensus of 32 national experts from 23 European Countries as well as Representative Board members and National Co-ordinators, an initial set of indicators was identified in the areas of legislation, participation and financing. The experts identified requirements for participation that included policies and practices related to school admission, national curriculum guidelines, national testing systems, the identification of educational needs and assessment systems. Experts developed indicators for each of these requirements, primarily drawing on their own extensive knowledge and experience in the field. The outcomes of the project included an overall framework for the development of indicators as well as a methodology to develop a set of indicators for monitoring developments in inclusive education. It was subsequently decided, that the applicability of the framework should be tested in a second project to further explore the development of an initial set of indicators for the area of participation.

The purpose of the second project was to build upon the work already carried out by the Agency and to develop and present a model for exploring and understanding participation within the context of inclusive education. Complementary to the bottom-up process taken by the first project, a systematic approach was to be taken in the second project by developing a framework for participation, analysing existing indicator systems and identifying ways to link different data or information generated at the individual, classroom, school, local and national levels. Consideration was given to qualitative and quantitative data from different sources and ways in which they can be combined to reach a better understanding of the complex issues around how policies and practices can help ensure participation for children, teachers and parents. In addition, this approach should help to identify gaps in existing indicators and



indicator systems and suggest a way forward for the development of new indicators on participation for inclusive education in Europe.

All countries of Europe have laws to support universal access to education and the child's right to education. Inclusive education should therefore be understood as part of the Education for All (EFA) agenda. The debate about inclusion has broadened in recent years from one which used to focus on the relocation of children described as having special educational needs to mainstream schools, to one which seeks to provide high quality education for diverse school populations. Subsequently, many countries have adopted a broader definition of inclusion: one which stresses participation and encompasses all children at risk of marginalisation, exclusion and underachievement – many of whom will be described as having special educational needs. (Appendix 3 provides further information on vulnerable population groups.)

Diversity is seen both as a value and a challenge, and a broad range of risk factors for exclusion such as poverty, language, ethnicity, religion, gender and mobility are considered. But respecting diversity and differences in abilities and experience, while ensuring participation and providing a high quality education for all children and youth remains a challenge.

While many countries have policies to support the development of inclusive education, it is recognised that inclusion will mean different things in different countries. In part, this is because the purpose and nature of schooling varies between countries and because there are different patterns of provision for children with special educational needs within and between countries. For instance, some countries have extensive provision of special schooling for children with different types of disabilities and difficulties, whilst other countries have developed provision within mainstream schools. In reality, most countries have groups of children who are excluded, who do not meaningfully participate in schooling, or have little to show for their time in school when they leave. Participation is an essential condition of inclusion, which is best understood in the context of a complex series of interactions between individuals, groups and the environment in which children and young people learn, live and grow. Schools are a crucial part of this environment. Inclusion is a dynamic field that is changing in light of new priorities and policy imperatives, alongside new understandings and insights into schooling and



pedagogy. Some countries also acknowledge within their policies and practices that barriers to participation exist within schools. Such barriers might be a consequence of a range of factors, including the legislative context, the curriculum, the skills and knowledge of the workforce in schools, teaching methods, systems of assessment, organisational structures, attitudes to difference and diversity, as well as problems with accessibility of buildings. Taken together these factors affect the capacity of an educational system to educate all children.

The development of a set of indicators for inclusive education is based on the premise that relevant, reliable and comparable information can help build this capacity. A first step to developing a more inclusive education system is to understand present problems and challenges within the broader context of national and international policies. All countries are already collecting data at the local and national level for various purposes. Such data may be quantitative or qualitative in nature, may represent facts or opinions, and could have been generated at individual, class or school level. These could include national data on school enrolment and completion, data on different forms of provision, data on post-school destinations, information on who and how many children are identified as having special educational needs or indicators relating to standards and achievement. Evidence is also generated by research, results of surveys, reviews, case studies of schools and evaluation reports. There are issues related to which data should be collected and how it should be gathered, shared, analysed, integrated, managed and stored. For example, while information on individuals needs to be protected from abuse by privacy laws, the aggregation of information on individuals and groups is necessary to increase the accountability of schools and education systems.

To understand what is happening to every child, clear questions about inclusion and participation are required and information on all levels of the educational system needs to be collected from many different sources. This data will need to be analysed, interpreted and managed and the knowledge that is created will need to be used to inform the development of policies and practices. Unfortunately, in many cases the necessary data does not exist, or where it does exist, it may not be shared with other people and agencies that need to know. Only data that is available and comparable across settings and time can assist in monitoring policy changes and their effects on



students and teachers. In order to make data comparable across education systems and countries, a common framework to represent and organise relevant information is required. Rather than working with isolated indicators, a methodology needs to be developed that can accommodate different forms of information, evidence and knowledge generated at different levels of the system.

The framework proposed in this report is not only about policies for supporting inclusive education and increasing participation, but also about how policy is translated into provision and in turn, how existing provision informs policy. The relationship between policy and practice is reciprocal and it is not possible to separate policy and provision completely. As part of the discussions related to this report, it was proposed that the framework should also allow for an exploration of innovations to support participation at the school and classroom level. This is because inclusive schools are created at the classroom level, school by school. It is the task of policy makers at national level to provide the framework in which such developments can occur, but the role of policy is not necessarily to steer or guide the innovation. In many countries the policy framework provides a supportive, enabling environment, which encourages innovation and allows schools to make the best policy and pedagogical decisions for all children. One of the dangers of an elaborate policy framework is that it can be too specific, too bureaucratic and too technical. This would then defeat the purpose of providing a tool for stimulating debate as well as supporting the collection of data and information in order to provide knowledge that is helpful in improving education for all children. There needs to be space for adjustments by each country to match their own circumstances within a broad framework.

This report has been produced for policy makers and decision makers, but also for professionals working in all areas of education. It is hoped that the outcomes of this project can inform the future thematic work of the Agency by helping to identify priority areas, collect empirical evidence and develop recommendations. The report may also be helpful for parents and voluntary groups who have an interest in inclusive education and it should encourage many people to engage with the complexities of creating a system of indicators designed to help monitor and develop inclusive educational provision and to help them understand the many inter-related strands that make up inclusive schooling. The report does not suggest a tick list approach to understanding inclusion and extending participation, nor



does it propose simple solutions to categorising children or the forms of provision in which children are educated, so that they can be more easily counted.



3. POLICY CONTEXT AND KEY ISSUES

3.1 Inclusive Education for All

For more than 20 years concern has been expressed by a number of international, regional and national agencies (for example, OECD, UNESCO, UNICEF, World Bank, European Commission and the Council of Europe, as well as numerous ministries and departments of education) about the numbers of children who do not attend school, who underachieve, or who have little to show for their attendance whilst at school. In response to these concerns the United Nations held the first World Conference on Education for All (EFA) in Jomtien, Thailand in 1990 (UNESCO, 1990). Subsequently, other international declarations and conventions built upon the call for Education for All. In 2000, the *World Declaration on Education for All* (UNESCO, 1990) was re-affirmed in the *Dakar Framework for Action* (UNESCO, 2000), which recognised that education deficits restrict social, economic and cultural development, reducing the capacity of individuals, communities and nations. It was also recognised that there was an unequal distribution of education within and between nations. The commitment to Education for All was further developed in the International Conference on Education in Geneva (UNESCO-IBE, 2009).

The UNESCO's *Salamanca Statement and Framework for Action on Special Needs Education* was adopted in 1994 (UNESCO, 1994). The United Nations *Convention on the Rights of Persons with Disabilities* (United Nations, 2006), in particular article 24 on Education, also provides clear support for inclusive education. To date, over half of Agency member countries have ratified both the Convention and the Optional Protocol (see: <http://www.un.org/disabilities/countries.asp?id=166>).

As a result, the number of children out of school has been reduced to about 75 million (UNESCO, 2010). Of those who are still without a school place, certain groups are particularly vulnerable to exclusion and underachievement, including children living in poverty, children with disabilities and (in some countries) girls. Patterns of exclusion and underachievement vary between countries and are influenced by cultural, religious and economic factors, but they are also influenced by school factors. Crucially, participation and achievement depends on the quality of schooling that is available.



EFA focused world attention on the basic learning needs of neglected groups and on learning achievement rather than on mere attendance. This is important because most countries have groups of children who are excluded and/or underachieve, leading to long-term economic and social consequences for everyone. Therefore, the challenge posed by EFA also applies to Europe, where many children are excluded or do not meaningfully participate in schooling or other educational programmes. EFA will not be achieved without inclusion and inclusion will not be achieved without EFA. As a consequence, UNESCO calls upon member states to 'adopt an inclusive education approach in the design, implementation, monitoring and assessment of educational policies as a way to further accelerate the attainment of Education for All (EFA) goals as well as to contribute to building more inclusive societies. To this end, a broadened concept of inclusive education can be viewed as a general guiding principle to strengthen education for sustainable development, lifelong learning for all and equal access of all levels of society to learning opportunities so as to implement the principle of inclusive education' (UNESCO-IBE, 2009, p. 18).

If inclusion and EFA are to be achieved, then capacity needs to be built throughout the system. Successful public sector capacity building needs to address three dimensions according to the World Bank:

- 1) Human capacity: individuals with skills to analyse development needs; design and implement strategies, policies, and programmes; deliver services; and monitor results.
- 2) Organisational capacity: groups of individuals bound by a common purpose, with clear objectives and the internal structures, processes, systems, staffing and other resources to achieve them.
- 3) Institutional capacity: the formal 'rules of the game' and informal norms – for example, in collecting taxes, reporting on the use of public resources, or regulating private business – that provide the framework of goals and incentives within which organisations and people operate (World Bank 2005, p. 7).

McLaughlin, Artiles and Hernandez (2006) adapted these features for inclusive education in developing countries and added a fourth dimension: the historical and political context. For children, school is



a social as well as an educational space, where learning occurs not only through the formal curriculum, but through relationships and encounters with all the opportunities that are planned and unplanned. The responsibilities of schools and schooling vary from place to place and will change across time. Therefore, concepts of inclusion have to be understood in a particular context. Inclusion is the complex process of increasing participation in the various aspects of schooling, including learning and achievement.

This report recognises inclusive education as an ongoing process in which social inequity, poverty and marginalisation have to be addressed within a framework of inter-sectoral policies. Child-friendly school cultures and environments should be promoted, encouraging the active role and participation of the learners themselves, their families and communities. Schools are crucial in the process of building inclusion, both as places and as communities.

The Associated Schools Project Network (ASPnet), along with other Education Networks established by UNESCO, brings together schools from different nations to promote quality in education. It focuses on UN priorities or topics such as 'Peace and Human Rights' or 'Intercultural Learning'. The importance of schools for educational innovation and the need to rethink top-down approaches to their governance has been taken up by OECD in the project 'Schooling for Tomorrow' that has led to publications on School Networks (OECD, 2003) and Personalising Education (OECD, 2006).

As a consequence of merging issues of special needs education with a broader agenda on making schools accessible and inclusive for all children, many international organisations have mainstreamed disability issues in their overall education policies. While at the policy level this has had the advantage of promoting inclusive education and participation, there are still unresolved issues about monitoring and therefore also about holding education systems accountable for promoting the rights of children with disabilities and special educational needs.

3.2 Equitable and accountable education systems

While the economic and social returns from education are complex, there are clear reciprocal links between poor education, disability and poverty. It could be argued that current conceptualisations of special educational needs (SEN) in many countries are associated with



patterns of identification which conflate poor achievement, poverty and SEN. In addition children identified as having special needs are more likely to be excluded from school. Being part of an educational underclass places individuals and groups at risk of becoming part of a social underclass, which has long-term economic as well as social consequences, not only for those individuals and groups, but also for the rest of society. Therefore dealing with exclusion and underachievement is not only the right thing to do, it also makes sound economic and social sense. It is not surprising that EFA became an international movement acknowledged by the second Millennium Development Goal (MDG, 2), which called for the achievement of universal primary education (UPE) by 2015 (United Nations, 2005).

The drive to improve participation and achievement for all children has led to the development of systems of accountability in several countries. Many such systems monitor participation in education in accordance with European policy imperatives including the *Lisbon Objectives in Education and Training*. The Commission reports regularly on progress (e.g. European Commission, 2009), including data on special needs education. More recently the PISA¹ work has been used to understand marginalisation and disadvantages in participating countries (OECD, 2010a, 2010b and 2011). Due to the exclusion criteria set by OECD as well as for various reasons at national and local levels, many children with SEN are not participating in PISA. Countries also differ in the degree to which they include SEN groups in PISA. Some countries do exclude more students than others and this is potentially biasing PISA results.

Educational inclusion and participation are often seen as human rights issues and essential components of social justice. The *Convention on the Rights of the Child* (United Nations, 1989) and more recently the *Convention on the Rights of Persons with Disabilities* (United Nations, 2006) require signatory states to promote full participation in education as a human right of every child. Tomasevski, the former United Nations Special Rapporteur on Rights to Education, emphasises the responsibility of societies to adapt schooling in order to enhance human rights through education.

¹ The OECD Programme for International Student Assessment (PISA) is an internationally standardised assessment that was jointly developed by participating economies and administered to 15-year-olds in schools.



She distinguishes between rights to education, rights in education and rights through education (Tomasevski, 2001). Rights to education can be linked to policies and practices related to admission (education being available and accessible), to equitable processes of education (education being adaptable and acceptable) and to policies and practices related to attainment, transition and destination (education being applicable and acknowledged). Achieving EFA is not only about increasing the number of school places, it is also about improving the quality of schooling and enhancing children's educational experiences and achievement. Similarly, the call for greater inclusion is not only about having more children educated in mainstream schools, it is about improving the quality and nature of the participation that all children experience in and through education.

In 2007, OECD published a report looking at inequalities in education and emphasised that 'education systems need to be fair and inclusive in their design, practices and resourcing' (Field et al., 2007). They developed 'The Ten Steps' policy recommendations for equity in education, which provides the following definition: 'Equity in education has two dimensions. The first is fairness, which implies ensuring that personal and social circumstances – for example gender, socio-economic status or ethnic origin – should not be an obstacle to achieving educational potential. The second is inclusion, which implies ensuring a basic minimum standard of education for all – for example that everyone should be able to read, write and do simple arithmetic. The two dimensions are closely intertwined: tackling school failure helps to overcome the effects of social deprivation which often causes school failure' (ibid 2007, p. 11).

Another area of international policy development is the promotion of children's participation in decision-making that affects their education. In 2001, UNICEF published a report on promoting children's participation in democratic decision-making. Enabling participation is about creating opportunities for children to be heard and to share power. The Council of Europe (2008) published a manual based on the European Charter on the Participation of Young People and has since been very active in promoting children's participation in decision-making. Because children can only assume their rights properly if they know how to participate in democratic decision-making processes, the term participation is also used in citizenship education. This more recent policy development aims to



hold education systems accountable to children and youth themselves.

3.3 Every child counts

Because children don't count if they are not counted, the capacity building of education systems to improve their data on children at risk of exclusion and marginalisation is an important policy issue internationally. Based on OECD's *International Education Indicators* (INES) (Bottani, 1998) and the *International Standard Classification of Education* (ISCED97) (UNESCO, 2006), UNESCO, OECD and EUROSTAT have developed a shared framework to report statistics and indicators in education. Unfortunately, the data published in *Education at a Glance* cannot be systematically disaggregated to gain reliable insights into the participation and achievements of students with SEN or disabilities.

In the 1990s, OECD undertook a 'Special Study on Statistics and Indicators' to improve the comparability of such data across countries. The aim was to harmonise national definitions related to SEN in order to improve data comparability. More recently, OECD developed a tri-partite definition to conceptualise disability in education systems (OECD, 2007 – see Appendix 4). This definition was recently used within the CRELL OECD study in Eastern Europe. (OECD and European Commission, 2009)

In the past the development of international indicators has followed a more inductive strategy: available statistical data were identified, and where necessary, improved over time to make them more comparable across systems so that they could then be developed into an indicator. This approach was taken by OECD for the development of statistics and indicators for disabilities, learning difficulties and disadvantages (OECD, 2005 and 2007). Eventually, this approach was confronted with the limitations of relying on irreconcilable conceptual problems related to national definitions, identification and approaches to difference.

The issue of how and whether children with SEN are currently being classified or categorised in member countries was also taken up by the Agency (European Agency, 2009b). Participation, achievement and special educational needs are sometimes perceived as separate issues, but structures put in place to monitor children with SEN can act as barriers to their participation and achievement by marking



these children as different. An unintended consequence of categorising some children in order to monitor their participation can produce a paradox, resulting in separate arrangements being made for their education. A further weakness in monitoring results from counting children in different forms of provision or in receipt of additional resources is the assumption that placement and SEN/disability are synonymous.

However, policy development is not possible without reliable data to inform reforms. Andreas Schleicher, Head of the Indicators and Analysis Division of OECD, said in one of his presentations: 'Without data, you are just another person with an opinion' (Schleicher, 2009).

The Agency collects data from its member countries (e.g. European Agency, 2010) and further information, in particular regarding ET 2020 (European Commission, 2009) is collected by the European Commission, by Eurostat and by Eurydice on a regular basis.

Currently, Eurostat is undertaking an enquiry into data collection relating to learners with special educational needs. This can be traced back to the May 2007 recommendations of the European Council of Education Ministers, which called for the development of indicators and better use of evidence in education and training. At the end of 2010 and in March 2011, Eurostat participated in two conferences organised by the Agency in the context of the 'Mapping the Implementation of Policy for Inclusive Education (MIPIE)' project. (For further information see: <http://www.european-agency.org/agency-projects/mapping-the-implementation-of-policy-for-inclusive-education>).

The Eurostat project plans to complement the approach proposed within the MIPIE work which provides a rationale for data provision and collection by members of the Agency network, together with the SEN contact points as nominated by ETS national co-ordinators. Work on the Eurostat project, to be carried out by external consultants, is scheduled for summer 2011 with the final report planned for winter 2011.

In the report of the 2008 Conference on Education, UNESCO encouraged member states to 'collect and use relevant data on all categories of the excluded to better develop education policies and reforms for their inclusion, as well as to develop national monitoring and evaluation mechanisms' (UNESCO-IBE, 2009, p. 19). After the



conference, UNESCO published the *Policy Guidelines on Inclusive Education* specifically to focus on the challenges for policy-makers and to show how inclusive education can be incorporated in every stage of a full policy cycle (UNESCO, 2009). It states that a 'needs analysis must proceed the formulation of policies and plans', that 'systems and methods of collecting education-related data are necessary to inform policy and practice' and that 'monitoring and evaluation are necessary to improve planning and implementation' (ibid, p. 23f.).

Although national and local governments already collect substantial data about education, little is known about participation. According to UNESCO (2010) there are no existing international measurement instruments for participation and international agencies are limited to using existing data that comes the closest to capturing educational participation. A further challenge is raised by the extent to which data, in addition to that which is already collected, is needed to monitor the participation of vulnerable groups, such as those identified as having special needs.

There are, however, major challenges associated with such monitoring efforts and reports. Currently most of the data collected for monitoring purposes is statistical data on enrolment in, and completion of schooling. Some countries collect data on transitions to further/higher education and to work. In addition, some countries collect quantitative data on participation and achievement for specific groups (for example, disability, SEN, gender, race/ethnicity, language, poverty). Few countries have systematic methods for collecting, analysing and interpreting qualitative data on participation at the individual, classroom and school level, although school self-review and inspection reports often address questions of participation and inclusion. In some cases the data already exists for different purposes but is not systematically collected, merged and analysed in order to answer questions about participation at the national level.



4. DEVELOPING A COMMON FRAMEWORK

4.1 Shared definitions

Internationally comparable indicators on education are based on the definitions provided by the *International Standard Classification of Education* (ISCED97) (UNESCO, 2006). Education is understood to 'comprise all deliberate and systematic activities to meet learning needs' and involves 'organised and sustained communication designed to bring about learning' (ibid, p. 9). Children and young people, parents, professionals, administrators and others are involved in the life situations created by education systems. However, as the main purpose of educational programmes is to provide education for children, the following definitions will concentrate on children and young people although they are also applicable to other participants in the education process.

The entities used to analyse specific policies and practices are educational programmes as identified and described in ISCED97: 'Educational programmes are defined on the basis of their educational content and an array or sequence of activities which are organised to accomplish a pre-determined objective of a specified set of educational tasks' (ibid, p. 11).

Where possible, definitions and methodologies provided by OECD, UNESCO and Eurostat should be used when developing new indicators. However, there is a need to develop further definitions to understand questions relating to the access, participation and progression of children vulnerable to exclusion, underachievement and marginalisation. Appendices 3 and 4 suggest areas where shared definitions and taxonomies may be developed as a basis for more comparable and reliable indicators at the European level.

4.2 A common framework for organising information

A common framework to contextualise and clarify existing indicators is a first step towards developing a set of indicators comparable at the national and international level. A common framework needs to explore the relationship between different indicators over time (temporal dimension) and across settings (spatial dimension). The framework presented here seeks to clarify and contextualise and also to complement existing indicators by identifying missing information that is relevant to inclusive education in general and to



issues around participation in particular. The framework will help to localise information available from different data sources and provide the basis for the development of a methodology to combine available information.

A common framework needs to take account of the fact that specific policies and practices can be identified at classroom, school and national or district levels. The *Development of a set of indicators – for inclusive education in Europe* (European Agency, 2009a, p.15) suggests that monitoring needs to be applied at these different levels. The differentiation of these levels is seen as important, because ‘many features of the education system play out quite differently at different levels of the system, which needs to be taken into account when interpreting indicators’ (ibid, p. 18).

Within the framework, the spatial dimension acknowledges that education is organised in different spaces or settings in which different actors and factors influence each other to shape processes and outcomes. For the purpose of clarifying the ‘spatial dimension’ of organising indicators, three system levels were defined: (1) micro level: individuals and their interactions/context of the classroom; (2) meso level: school as an organisation and environment/context of the school, and (3) macro level: societal level of education/context of national or local authority. In addition, this dimension also focuses on the ‘individual participants in education and learning’.

In earlier work on indicators (European Agency, 2009a, p.14), an ‘input-process-outcome’ model was introduced to understand monitoring mechanisms and policy development. During this work, there was a consensus that more information was needed on the education process itself to understand outcomes (ibid, p. 16) because inclusive education and participation are dependent on how policy requirements are implemented and lived in schools and classrooms.

For the purpose of this report therefore, the process component (temporal dimension) of education has been divided into three phases to allow an in-depth analysis of related policies and practices important to participation:

- Policies and practices related to assessment activities (identification of needs, understanding difference, testing for planning purposes, monitoring learning);



- Policies and practices related to planning activities (e.g. decision-making processes about the curriculum and resource allocation, individual educational planning);
- Policies and practices related to instruction, intervention or teaching activities (e.g. pedagogy, instruction, teaching arrangements, interventions).

This reflects the action cycle of professionals in all phases of education and at different levels of the education system, nationally and internationally (i.e. assessing/analysing, planning and teaching, followed by an evaluation of teaching outcomes to inform further planning and teaching).

The matrix used in this project (Table 1) was developed during the 'Measuring Health and Disability in Europe, 6th Framework Programme (MHADIE)' project to understand the functioning of education systems (Hollenweger, 2010).

Table 1 Matrix to organise information on participation

		<i>Input</i>	<i>Process of Education</i>			<i>Outcome</i>
<i>Participatory Policies and Practices</i>		<i>Admission</i>	<i>Assessment / Analysis</i>	<i>Planning, Allocation</i>	<i>Instruction, Intervention, Teaching, School-related activities</i>	<i>Evaluation and Transition</i>
<i>Systems of Education</i>	<i>Education System</i>					
	<i>School</i>					
	<i>Classroom</i>					
Participatory relationships as mediators between policies / practices and individuals						
<i>Participation of Individuals</i>						



In 2009, the Agency developed requirements and preliminary indicators on participation that can be organised in the above matrix combining the temporal and spatial dimensions. The four requirements for participation are: admission policies, identification of educational needs and assessment systems, curriculum guidelines and testing systems (European Agency, 2009a, p. 26). The indicators identified by the Agency (listed in Appendix 2) focus on policy conditions as well as on the participation of individuals and so will refer to more than one cell of the matrix.

International Indicators in Education Systems (INES) followed a similar model to the one outlined above. This work distinguished between instructional settings and learning environments, educational service providers and the education system as a whole (OECD, 2010c, p. 17). The temporal dimension or the process of education is also represented in the INES framework as a second dimension. It groups indicators 'according to whether they speak to learning outcomes for individuals or countries, policy levers or circumstances that shape these outcomes, or to antecedents or constraints that set policy choices into context' (OECD, 2010c, p. 17). Indicators seen as policy levers include 'individual attitudes, engagement and behaviour for teaching and learning' (of individual participants), 'pedagogy, learning practices and classroom climate' (instructional settings), 'school environment and organisation (providers of educational services) as well as 'system-wide institutional settings, resource allocations and policies' (education system as a whole).

Data informing potential new indicators may be available at the classroom or school level. School level explorations of participation could build upon existing work on school self-review such as the *Index for Inclusion* (Booth & Ainscow, 2002) or the *Achievement and Inclusion in Schools* (Black-Hawkins, Florian & Rouse, 2007) as well national indicators or systems developed for self-evaluation of schools (e.g. Department of Education, Northern Ireland, 2010). Work at the individual level would require qualitative exploration of people's (children, parents, professionals and policy-makers) experiences of inclusive education over time.

All the above aspects are relevant to inclusive education and may promote or hinder participation. Existing internationally comparable indicators relevant to participation mainly focus on input (policies and



practices related to admission or access) or outcomes (policies and practices related to attainment, certification, graduation and transition). Conditions relevant for inclusive education are, however, mainly reflected in the process component of the input-process-outcome model. Methodologies could be developed to build connections between these diverse sources of information and the common framework presented here.

4.3 Integration of data from diverse sources – enhancing compatibility

Once an agreement has been reached about common indicators to be developed, the identification and collation of relevant data or information from different sources should be considered. Some information may be qualitative in nature and may not be easily quantifiable; some information may be primarily subjective, such as attitudes or well-being of teachers. While such information cannot be used as objective representations of reality, it is still the most relevant in understanding participation. Therefore, different types of data need to be included to provide information on different aspects of participation. The following data sources are relevant for participation:

- 1) National statistics (collected or collated annually). In addition to education, associated areas such as health and social welfare may also collect information on participation.
- 2) Census (periodic enumeration of a population). In addition to the national census of the entire population that might take place typically every ten years, many countries have an annual census of schools using data provided by the schools or local authorities.
- 3) Audits, reviews and inspection reports (topic-specific, often included in accountability procedures).
- 4) Surveys (e.g. of parents, teachers). These are often linked to policy priorities and seek to collect additional data where statistics do not provide enough information.
- 5) Research (studies and evaluations) carried out to understand better the complex dynamics across time and settings.

Data from all sources may include different types of information, ranging from:



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- a) Demographic information like age, gender, nationality that are easily represented in data sets;
 - b) Information based on constructs or definitions like ‘under-privileged’, ‘disabled’, or ‘socio-economic status’;
 - c) Interpretations as in reports by individuals or agencies who may weigh data differently (e.g. inspection reports);
 - d) Subjective views as in data on well-being or attitudes.

Further challenges are raised by questions about the compatibility of data from different data sources. For example, are the same definitions for disability shared by education and health systems? Do different informants share a common understanding of key issues (e.g. inspectors, quality improvement officers, teachers and head teachers)? Are data on similar issues collected at different levels of the education system compatible (e.g. descriptions of difficulties or disabilities used at classroom, school and national levels)?

Compatibility can be enhanced if the same constructs or definitions are used to refer to the same phenomenon. Shared taxonomies as proposed in Appendices 3 and 4 can help to ensure that the same terminology is referring to comparable information. Only when data is compatible and available can it be adequately aggregated or disaggregated between individual, classroom, school and education system levels and monitored across the process of education. For example, if schools only account for student characteristics at a group-level, individual students’ progress cannot be monitored across educational programmes. Or if national surveys collect data on student’s transition from school to work, but no compatible data are available at school level, it is impossible to understand school-based factors that lead to higher transition rates of children with disabilities into tertiary education.

There are two aspects of capacity that affect participation and how it might be monitored. First is the capacity of the educational system itself to build inclusive participatory educational institutions and programmes. This has been addressed as a major policy concern internationally. The second relates to the capacity for collecting, managing, analysing and interpreting data about inclusion and participation from different levels of the education system and transforming the data into information that can be used to build capacity in the system. The World Bank and UNESCO (2003)



suggest that education statistics and other data should be judged against the following factors: integrity, methodological soundness, accuracy and reliability, serviceability and accessibility. It is in this complex and contested arena that the task of producing a framework for the development of indicators of inclusion and participation has been undertaken.

Further discussion is needed to identify priority policy issues around participation within the framework presented in this report. Essentially, the full participation of all students is the main purpose of education systems. But participatory education systems also have to ensure the participation of other key people including parents and teachers. OECD uses policy issues as a third organising principle in its INES framework, distinguishing three major categories: quality of educational outcomes and educational provision, issues of equity in educational outcomes and educational opportunities, and the adequacy and effectiveness of resource management (OECD, 2010c, p. 17). In the 2010 edition of *Education at a Glance* three indicators are included for the area of 'Access to Education, Participation and Progression', one of them is 'Participation in Education' (OECD, 2010c).

Decisions about policy priorities within the area of participation can only be taken once the concept itself is further clarified. Firstly, a more detailed definition is required for participation that can be applied to individuals. Secondly, clarification is needed related to participatory policies and practices: how can input, process and outcome variables at micro, meso and macro levels work together to ensure participation of all individuals involved? Thirdly, participatory policies and practices have to be 'lived' in relationships at each level of the education system and at each phase of the educational process. Participation is ultimately rendered possible or accomplished through participatory relationships. Although relationships cannot be easily captured or substantiated in indicators, it is important to provide a definition and to consider further the importance of participatory relationships as the vehicle to achieve participation.



5. INDICATORS FOR THE AREA OF PARTICIPATION

5.1 Indicators on participation

Participation of students at its most basic level refers to 'being there', for example being admitted to a school or other educational programme, remaining in and completing an educational programme and leaving or terminating, with something to show for the time spent in the programme. Leaving an educational programme implies a transition either to the next level of education, to work and employment or other domains of adult life. Being physically present in a specific educational programme is a necessary but not a sufficient condition for full participation. Indicators on participation as 'being there' provide no information on the extent and quality of participation. In the context of inclusive education this has been acknowledged as a significant shortcoming (Black-Hawkins, Florian & Rouse, 2007). Therefore the definition of participation as it is presently implemented in international statistics needs to be expanded. In order to participate fully in education, an individual needs to be continually and meaningfully involved in an educational programme.

As mentioned earlier, the term education is 'taken to comprise all deliberate and systematic activities designed to meet learning needs. This includes what in some countries is referred to as cultural activities or training. Whatever the name given to it, education is understood to involve organised and sustained communication designed to bring about learning' (UNESCO, 2006, p. 9). As stated previously, children and young people, parents, professionals, administrators and others are all involved in the life situations created by education systems. Therefore, the following definitions, although focused on children and young people, will also be applicable to other participants in the education process.

'The key concepts of participation are – what does the child want to do, how do most children behave, and what activities have high social, developmental or educational priority?' (McConachie et al., 2006, p. 1163). In other words, three components need to be understood when conceptualising participation: the relevance or importance of activities to the individual, the comparability of activities to activities expected of, or carried out by children in general, and the general relevance or importance of activities in the



context of social, developmental or educational goals. In other words, participation can be defined as being engaged in typical activities that have high priority.

Being engaged is an important component of participation. School engagement is a multi-dimensional construct including behavioural engagement (positive conduct, involvement in learning and academic tasks, participation in school-related activities), emotional engagement (affective reactions such as interest, happiness, identification with teachers and peers) and cognitive engagement (self-regulation, flexibility in problem solving, coping strategies) (Fredricks et al., 2004). These factors are dynamically interrelated within the individual and respond to variations in environments. The process of being involved or engaged is internal and cannot be observed or captured in indicators. But it is reflected in (generalised and specific) activity patterns of engagement/involvement or disaffection/withdrawal (Connell, 1990). These patterns are understood as inputs and outcomes of having experienced fulfilment or frustration of the basic needs for competence, autonomy and relatedness. Subjective aspects of participation such as satisfaction with one's involvement and well-being are strongly linked to these basic needs (Reis et al., 2000).

Being engaged in typical routines and typical settings is another aspect of participation. Coster and Khetani (2008, p. 643) claim that 'much of daily life is structured into sequences of activities that serve a common purpose, i.e. routines. Although the specific sequence may be highly individualised, the overall purpose tends to have societal or cultural importance. ... One way to describe participation is the extent to which the child actively engages or takes part in these common routines along with the other members of his or her family or community.' Involvement in life situations (such as school or leisure) can be defined as carrying out activities in sequences and settings that are typical for a society, country or community. Or as Coster and Khetani (ibid) put it: 'Thus a child can run and kick a ball in a great number of places, however, he or she can participate in playing soccer only when there are willing playmates and an accessible space in which to do so.'

Life situations are characterised 'by sets of organised sequences of activities directed toward a personally or social meaningful goal. These goals are setting-specific and include sustenance and



physical health, development of skills and capacities and enjoyment and emotional well-being' (Coster and Khetani, 2008, p. 643). Participation therefore also 'reflects the extent of engagement in the full range of activities that accomplish a larger goal' (ibid). All education systems declare such goals in their curricula or other policy documents. The involvement in all activities relevant to reach these goals is therefore another important aspect of participation.

Examples of existing indicators

Some existing indicators are listed below to illustrate the diversity of data available on participation at different levels of the education system. Some of the indicators are not self-explanatory; definitions and further explanations can be found in the original documents. Statistical information available at international level is not yet able to disaggregate data consistently according to different population groups relevant for SEN (see appendix 3). As the indicators draw on different data sources and were developed in different contexts and for different purposes, they are not necessarily comparable with one another.

Participation – being there (Participation with regard to Admission):

- Students not registered within the education system. Data source: National Statistics and OECD (data only available for France for 2005; OECD, 2005 and 2007);
- All students with disabilities assigned to the same school attended by non-disabled students in their neighbourhood unless their parents have elected to send them elsewhere. Data Source: *Quality Indicators for Effective Inclusive Education Guidebook* (Indicator 3.4; New Jersey Council on Developmental Disabilities, 2010);
- Enrolment rates by Educational Programme. Data source: National Statistics and OECD (Indicator C1; OECD, 2010c);
- Enrolment of children receiving additional resources by educational programme. Data source: National Statistics and OECD (OECD, 2005 and 2007);
- Enrolment of children identified as having a disability by educational programme. Data source: National Statistics and OECD (OECD, 2005 and 2007);



- Number of compulsory school aged pupils (all students and students who have SEN). Data source: National Statistics (European Agency, 2010);
- Enrolment of pupils with SEN by setting (special schools, special classes, inclusive settings). Data source: National Statistics (European Agency, 2010);
- Participation in tertiary education. Data Source: Eurostat, UOE (Indicator 10; European Commission, 2000);
- Participation of parents: Existence and role of parent associations. Data Source: OECD (Indicator D6.2; OECD, 2010c).

Participation in Assessment:

- Teachers use an appropriately wide range of assessment for learning strategies, including self-assessment. Data Source: Self-evaluation of schools, Northern Ireland (Quality Indicator in Section B, under Key Question 2; Department of Education, 2010).

Participation in Planning:

- Pupils are involved in helping to identify personal learning targets. Data Source: Self-evaluation of schools, Northern Ireland (Quality Indicator in Section B, under Key Question 2; Department of Education, 2010).

Participation in Instruction / Intervention / Teaching / School-related activities:

- Time students spend in classroom. Data source: National Statistics and OECD, UNESCO Institute for Statistics for countries outside Europe (Indicator D1; OECD, 2010c);
- Time teachers spend teaching. Data source: National Statistics (Indicator D4; OECD, 2010c);
- Students with disabilities arrive and leave classrooms at the same time as their non-disabled peers, unless stipulated otherwise in their IEP. Data Source: *Quality Indicators for Effective Inclusive Education Guidebook* (Indicator 3.5; New Jersey Council on Developmental Disabilities, 2010);



- All students take part in activities outside the classroom. Data Source: *Index for Inclusion* (Indicator C1.11; Booth and Ainscow, 2002).

Participation in Evaluation / Transition:

- Educational attainment as successful completion of the various/different levels and/or phases and/or qualifications. Data source: National Statistics (Indicator A1; OECD, 2010c);
- Percentage of the youth population in education and not in education, by level of education (Indicator C3.2; OECD, 2010c);
- Professional aspirations of students below the reading skills threshold compared with students who perform better. Data Source: PISA 2000 (European Group of Research on Equity of the Educational Systems, 2005, p. 45);
- Dropout rates. Data source: Eurostat, Labour force survey (Indicator 8; European Commission, 2000, p. 33);
- Socio-political participation for different levels of educational attainment. Data Source: World Values Survey (European Group of Research on Equity of the Educational Systems, 2005, p. 88).

5.2 Indicators on participatory policies and practices

Policies and practices are set up to organise the process of education (moving into, maintaining, progressing and terminating an educational programme) by creating environments to determine and implement principles and procedures related to admission, assessment, planning, teaching and evaluation. Policies and practices exist at all levels of the education system (classroom, school, national or local authority) and determine the relationships between them. The matrix introduced earlier in this report can help to map different policies and practices in different countries to see where shared indicators could be developed for similar educational programmes. According to ISCED97, the nature of an educational programme can be defined on the basis of its educational content and other parameters such as 'general orientation of the programme, the field of education, the service provider and the educational setting or location, the mode of service provision, the type of participant or the mode of participation' (UNESCO, 2006, p. 15). Although some of these parameters may be attributes of the



institution or linked to the mode of provision rather than the educational programme, they may have important functions, for example in distinguishing segregated from integrated settings.

Participatory policies and practices create life situations that promote engagement for all students. They create, facilitate, and enhance opportunities to learn and remove barriers to participation in educational programmes. They also ensure participatory relationships. They are expressed through six interrelated and essential features of education and educational programmes mentioned earlier: available and accessible (input), acceptable and adaptable (process), applicable and acknowledged (outcome). Environments that promote engagement provide enabling structures (stable, consistent and reliable patterns of activity), opportunities for involvement (welcoming atmosphere, enjoyment of individual by those in social surrounding) and autonomy support (choice, respect for individual goals and values) (Fredricks et al., 2004).

Examples of existing indicators

Some existing indicators are listed below to illustrate the diversity of data available on participatory policies and practices. As the indicators draw on different data sources and were developed in different contexts and for different purposes, they are not necessarily comparable with one another.

Participatory Policies and Practices: Admission:

- Everybody is made to feel welcome. Data Source: *Index for Inclusion* (Indicator A1.1; Booth and Ainscow, 2002).

Participatory Policies and Practices: Analysis / Assessment. (The outcomes of the Agency project 'Assessment in inclusive settings' should also be taken into consideration here. See: <http://www.european-agency.org/agency-projects/assessment-in-inclusive-settings>)

- State has written guidelines and examples for the participation of students with disabilities in large-scale assessment. Data Source: State guidelines, state training materials. (Indicator 1 Assessment; Consortium on Inclusive Schooling Practices, 2001);

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- Assessment contributes to the achievement of all students. Data Source: *Index for Inclusion* (Indicator C1.6; Booth and Ainscow, 2002);
 - Teachers measure student understanding, and refine instruction using a variety of ongoing (formative) assessments. Data Source: *Quality Indicators for Effective Inclusive Education Guidebook* (Indicator 4.7; New Jersey Council on Developmental Disabilities, 2010).

Participatory Policies and Practices: Planning / Allocation:

- Effectiveness of planning to support and promote successful learning. Data Source: Self-evaluation of schools, Northern Ireland (Quality Indicator in Section B, under Key Question 2; Department of Education, Northern Ireland, 2010);
- Teaching is planned with learning of all students in mind. Data Source: *Index for Inclusion* (Indicator C1.1; Booth and Ainscow, 2002);
- Teachers plan, teach and review in partnership. Data Source: *Index for Inclusion* (Indicator C1.8; Booth and Ainscow, 2002);
- School-level bodies involve parent representatives in the preparation of the school development plan. Data Source: Eurydice (Quality Indicator 12; European Commission, 2000);
- Parents are encouraged to participate in decision-making and advocacy activities in the district. Data Source: *Quality Indicators for Effective Inclusive Education Guidebook* (Indicator 8.3; New Jersey Council on Developmental Disabilities, 2010).

Participatory Policies and Practices: Instruction / Intervention / Teaching / School related activities:

- Curriculum Provision: Does the curriculum offer coherent broadly balanced programmes of learning which provide learners with clear progression opportunities? Data Source: Self-evaluation of schools, Northern Ireland (Quality Indicator in Section B, under Key Question 3; Department of Education, Northern Ireland, 2010);
- Teachers regularly plan lessons involving materials to supplement the text (e.g. videos, DVDs, web resources, magazine articles, newspapers, etc.). Data Source: *Quality*



Indicators for Effective Inclusive Education Guidebook (Indicator 4.6; New Jersey Council on Developmental Disabilities, 2010);

- Bullying is minimised. Data Source: *Index for Inclusion* (Indicator B2.9; Booth and Ainscow, 2002).

Participatory Policies and Practices: Evaluation and Transition:

- Written transition procedures and activities are in place to smooth the transition of students from grade to grade and school to school. Data Source: *Quality Indicators for Effective Inclusive Education Guidebook* (Indicator 5.4; New Jersey Council on Developmental Disabilities, 2010);
- Progression: How far do learners demonstrate progression within the school, building on their prior achievements, in preparing appropriately for the next phase of their learning? Data Source: Self-evaluation of schools, Northern Ireland (Quality Indicator in Section C, under Key Question 5; Department of Education, Northern Ireland, 2010).

5.3 Indicators on participatory relationships

Typical sequences of activities (participation) in typical settings (policies and practices) are created and communicated through patterns of interaction (Jordan, 2001) or relationships. Interactions and relationships require participation (input) and at the same time are the vehicles to achieve participation (outcome). Participatory relationships initiate, support and maintain involvement of children, parents and teachers. Underlying attitudes towards and guiding principles of diversity, inclusion, and a human rights-based approach are expressed through interactions and relationships. Professionals such as teachers, school principals and administrators have a special responsibility in enabling and maintaining participatory relationships – but they cannot guarantee it. To create participatory relationships, interaction partners must be able to actively engage with the other (behavioural aspect of engagement, being able to relate), show positive affect towards the other (emotional aspect of engagement, being able to accept oneself and others) and understand the other (cognitive aspect of engagement, being able to regulate oneself through strategies and capacities for meta-cognition, problem-solving, etc.). These three components of involvement in relationships are expressed through collaboration, acceptance and recognition.



Examples of existing indicators

Some existing indicators on participatory relationships at classroom and school levels are listed below. Due to the complexity of variables affecting human interactions and relationships, the indicators below mainly rely on opinions or views of individuals. Data from different sources (teachers, students, parents) needs to be compared to gain a fuller insight into relationships. Such information requires the use of reliable scales or questionnaires. Through research studies insight can be gained into the dynamics between instructional interaction patterns of teachers, teachers' attitudes towards exceptionality and children's self-concept (Jordan, 2001). It is therefore suggested that to go beyond broad statements on participatory relationships, a research approach may be needed to understand how relationships contribute to participation or exclusion.

Participatory relationships at school level:

- Staff collaborate with each other. Data Source: *Index for Inclusion* (Indicator A1.3; Booth and Ainscow, 2002);
- There is a partnership between staff and parents/carers. Data Source: *Index for Inclusion* (Indicator A1.5; Booth and Ainscow, 2002);
- Links and Partnerships: How effective are the links and partnerships with parents, other providers (including schools), other agencies and employers and the wider community to identify and to meet the current and future needs of learners? Data Source: Self-evaluation of schools, Northern Ireland (Quality Indicator in Section C, under Key Question 1; Department of Education, Northern Ireland, 2010).

Participatory relationships at classroom level:

- Students help each other. Data Source: *Index for Inclusion* (Indicator A1.2; Booth and Ainscow, 2002);
- Students learn collaboratively. Data Source: *Index for Inclusion* (Indicator C1.5; Booth and Ainscow, 2002);
- Adults in classrooms share roles, and responsibilities such as the distinction between specialist and the general education classroom teacher are not obvious. Data Source: *Quality*



Indicators for Effective Inclusive Education Guidebook (Indicator 9.2; New Jersey Council on Developmental Disabilities, 2010);

- Teaching Assistants support the learning and participation of all students. Data Source: *Index for Inclusion* (Indicator C2.3; Booth and Ainscow, 2002).



6. A POSSIBLE WAY FORWARD: BUILDING THE CAPACITY FOR THE DEVELOPMENT OF COMPARABLE INDICATORS

6.1 Need for a common language

Inclusive education is about building and improving the capacity of classrooms, schools and education systems to be inclusive and to promote the participation of all children, teachers and parents. Providing reliable and comparable evidence on important aspects of current provision and the effects on participation can strengthen this capacity. The over-arching goal of developing a set of indicators for inclusive education is to overcome the weaknesses and problems in existing indicator systems.

The area of participation was identified in the first Agency project (*Development of a set of indicators – for inclusive education in Europe*, European Agency, 2009a) as a priority area for inclusive education and it has been used in this second project to explore the way forward and to suggest requirements and explore indicators. The aim is to understand the situation in the member countries, share information and learn from each other. A common framework in the area of participation will help to compare and contextualise available data as well as improve the quality and comparability of existing indicators. New indicators may also need to be developed to understand how policies and practices promote or hinder participation. Therefore, this report should also provide the basis for decisions about which additional indicators should be developed.

For future indicators to be meaningful to member countries, they have to answer the most pressing questions; at the same time new indicators need to be linked meaningfully to existing data. The relationship between indicators also needs to be clarified if they are to form a meaningful and coherent information system. For this purpose, it is suggested that in addition to taxonomies already developed and implemented (ISCED97, OECD's INES), it may be necessary to further develop shared taxonomies to describe population groups at risk of being marginalised and to describe health and health-related issues (see appendices 3 and 4).

As suggested by the Agency's 2009 report, the framework and definitions for the area of participation can also be used to identify future areas of work. Through providing a coherent framework, the collection of empirical evidence from experts can be facilitated and



made more comparable. This in return should help to develop recommendations that can be linked more directly to both the identified area of work and the empirical evidence available in each country. This process can be strengthened if member countries systemically analyse existing data at all levels as indicated in the next section.

6.2 Five steps to develop new indicators

While the Agency may use the framework and definitions presented in this report for their thematic projects, the question remains as to how a common set of indicators can be developed. It is hoped that the work presented here helps to clarify the complexities of organising and developing comparable and meaningful indicators for the area of participation. Had the Agency attempted to develop one set of indicators to be applied to all countries, this work would have been set to fail from the beginning. Every attempt that ignores existing practices at national, regional or local level with regard to data collection and data sharing would be unacceptable. This second indicators project has developed a common framework and consistent definitions for the area of participation. It has developed the methodology and tools, but it is the task of the member countries to populate the matrix with data that is available in their systems and to define the domains where common and comparable indicators should be developed. To help this process, a five-step analysis is suggested:

Step 1: Make an inventory of available data

An important first step towards developing new indicators is to make an inventory of available data and organise the data in the matrix presented in Table 1 of this publication. This exercise will most likely lead to many questions on how existing indicators need to be understood and how exactly they are operationalised and measured. Indicators could also spread across more than one cell or only respond to one aspect of one cell. In some cases, it may not be clear whether an indicator provides information about participation, participatory policies and practices or participatory relationships until the operationalisation behind the indicator is analysed. Information available from all sources should be considered. Countries may also consider including relevant data from health and welfare systems. Data from different sources may speak to the same cell and this may



raise questions regarding the comparability of such data. Do data collected by different agencies fit together? How can it be ensured that data complements each other? How can different definitions and terminology that render data exchange impossible be avoided? What are key issues in sharing data among stakeholders on all levels to make data gathering exercises more efficient?

Step 2: Identify gaps in available data

Once the matrix is populated with the different types of data available from different sources, gaps could be identified. Are there cells where no information is available? Is the available information covering the main concerns or just areas of marginal interest? Is there other evidence available on empty cells, for example information provided by research studies? Is there a need to have information covering the full school population or could information be obtained through representative samples to complement missing data? What exactly is the problem associated with a specific gap? Which efforts would need to be invested to fill the gap? Do other countries have similar gaps or do they have reliable data available? And if they have these data, how do they collect the data? How could these gaps be filled – by more reliable statistics, by adding questions to existing surveys, e.g. the census, by conducting specific surveys or by initiating a longitudinal study?

Step 3: Check whether available data can be aggregated and disaggregated across levels

An elegant way of filling gaps at different levels of the education system is by aggregating or disaggregating data available vertically across cells – from individual via classroom, school and regional level to national and international level. Therefore countries should check whether existing data covering specific cells of the matrix can be used to inform the cell above or below. Aggregation may be more difficult to achieve with qualitative data, but it may be more informative than only relying on quantitative data. Questions can be asked about the level to which data needs to be reported in the system, and who will need to work with which type of data.

Step 4: Check whether available data can be monitored across the process of education

Indicators need to be sensitive enough to detect changes when they occur (European Agency, 2009a, p. 16). If outcome indicators cannot



be related to input and process indicators, they do not help in understanding why outcomes do or do not change. Monitoring mechanisms are only effective if indicators can be linked across time and to the process of education. Once countries have completed their inventory of available data, they can go through the cells horizontally and check whether existing data in one cell is related to available data in the subsequent cells. Questions can be asked about how the data can be traceable across time and which input, process and outcome variables need to be linked.

Step 5: Check whether available data respects the interests of the persons behind the data

Generally, the data available at national level is under strict control and regulation because of data protection and privacy issues. But this may not be the case with data on individual children or their families available at classroom and school levels. Regulations in some countries may not permit the collection of specific pupil-based data, the aggregation of such data or the pooling of such data from different sources. These issues should be discussed and considered when evaluating existing data, including data from new sources or developing new data to fill the gaps. In addition, data should be used in the best interest of the people involved. The people providing information or whose information is used to generate data should have access to the data and be able to verify it and draw information from the data that is meaningful for them or for their work. Another concern may be that some of the cells, especially regarding the process and outcomes, may contain subjective information relating to students, parents and teachers. There is a need to ensure that any data collection exercise benefits children (and their families).



7. CONCLUSION

Based on the results of the five-step-procedure outlined in the previous section, countries will be able to express their needs and wishes as to which of the existing data should be developed into reliable and comparable indicators and where they would welcome the development of new indicators. Efficiency considerations require an economic design of any data collection system, thus existing data collection systems should provide the starting point. As a consequence, no single country will have the same indicator system as any other – at least for the next few years. Although this may sound pessimistic, it is quite the opposite: if countries do adopt a common framework and shared definitions to understand the area of participation, a path is opened to systematically learn from each other and to build a more coherent set of indicators where countries deem it necessary or useful. While the use of different data sources and different types of data to understand participation is very complex, it can be tackled. The potential benefits for individuals, for schools, for the educational system and for society may well be worthy of the efforts.



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APPENDICES

Appendix 1: List of Abbreviations

ASPnet	Associated Schools Project Network
CRELL	Centre for Research on Lifelong Learning
EFA	Education for All
IBE	International Bureau of Education
ISCED	International Standard Classification of Education
INES	International Indicators in Education Systems
Eurostat	Statistical Office of the European Union
MDG	Millennium Development Goals
MHADIE	Measuring Health and Disability in Europe, 6 th Framework Programme
OECD	Organisation for Economic Cooperation and Development
PISA	Programme for International Student Assessment
SEN	Special Educational Need
SNE	Special Needs Education
UNESCO	United Nations Educational, Social and Cultural Organisation
UNICEF	United Nations Children's Fund (formerly United Nations International Children's Emergency Fund)
UOE	UNESCO, OECD and EUROSTAT Data Collections on Education Systems



Appendix 2: Indicators on participation developed in the first project

Policies and Practices related to Admission (available and accessible):

- Established rules for adapted transport facilities;
- Established rules for accessibility issues in the construction of buildings, equipment, infrastructure;
- Established rules for technical tools to be in place for all pupils/students according to their individual needs.

Policies and Practices related to the Process of Education (adaptable and acceptable):

- Initial identification of a pupil's/student's needs is conducted from a holistic and primarily needs based view that links into not only teaching and learning, but also IEP development and review procedures;
- Established rules for the range of assessments used to allow all pupils/students to display their skills;
- Procedures are non-discriminatory and based on best practice approaches;
- Established rules for flexibility in the curriculum to meet individual educational needs;
- Established rules for curricula to be related to real life needs of pupils/students and not only to academic learning;
- Established rules for schools to provide learning opportunities for all pupils/students regardless of background or learning abilities.

Policies and Practices related to Outcomes (acknowledged and applicable):

- Established rules for a wide range of learning outcomes to be valued;
- Established rules for assessment to include and encourage the achievements of all pupils/students;
- Established rules for accommodation and modification of testing methods and tools to be available when necessary.



Participation of Individuals related to Admission:

- Numbers and percentages of pupils/students with SEN in mainstream classes, units in mainstream schools, segregated learning institutions, excluded from the education systems are collected and monitored at different levels of the system;
- Numbers and percentages of pupils/students with SEN educated under the responsibility of health, social welfare (children in care) or youth justice, children at home, are collected and monitored at different levels of the system.

Participation of Individuals related to Process of Education:

- Established rules for the system of identification of needs to be geared towards each learner's educational experiences.



Appendix 3: Taxonomies on vulnerable population groups

UNESCO distinguishes three major groups that are at risk of being marginalised: (1) children living in poverty, (2) vulnerable children (children in crisis and early post-crisis situations, street children, children with disabilities) and (3) minorities (indigenous people, children on the move or other marginalised groups). On UNESCO's homepage under the heading of inclusive education, the following groups are listed: Roma Children, Street Children, Child Workers, Child Soldiers, Children with Disabilities, Indigenous People, Rural People.

The project RICHE (Research in Child Health in Europe, 7th Framework Programme) uses the following taxonomy to organise research evidence on specific population groups (see <http://childhealthresearch.eu/> for more information on that project):

Family / parenthood terms:

- Teenage parents
- Teenage fathers
- Teenage mothers
- Children in single parent households
- Singleton children
- Children in care
- Adopted children
- Those adopted at birth
- Those adopted at older ages
- Those adopted by family members
- Children in care but supervised at home
- Children removed from home
- Children whose home is in other residential institutions
- Bereaved children
- Orphan children

Economic-type:

- Children in poverty
- Socio-economic status
- Street children / Homeless children



- Travellers
- Young workers

Living status terms:

- Children who are alcohol users
- Children living with alcoholic parents
- Children who are carers
- Children of parents with mental illness

Criminality type terms:

- Children in penal institutions
- Children whose parents are in penal institutions

Migration type terms:

- Asylum seekers (Children in asylum seeking families)
- Children of illegal immigrants
- Illegal residents
- Culturally itinerant children
- Migrants
- Refugees
- Children of minority faith parents
- Ethnic minority groups

Sexual orientation:

- Bisexual children
- Children with bisexual parents
- Homosexual children
- Children with homosexual parents

Reproductive health type terms:

- Babies conceived through artificial means
- Children conceived by gamete donation assisted reproduction techniques
- Children from surrogate parents



Appendix 4: Taxonomies on health and health-related issues

An overview over the current uses of classification and categorisation systems used in member countries was developed by the Agency (2009). The taxonomies used by more than one country will be listed below.

Tri-partite definition developed by OECD

As the work of OECD (2007) has shown, there is no common taxonomy to conceptualise disability in education systems. For the purpose of enhancing comparability, OECD has developed a tri-partite definition (2007, p. 3):

Category A: Students with disabilities or impairments viewed in medical terms as organic disorders attributable to organic pathologies (e.g. in relation to sensory, motor or neurological defects). The educational need is considered to arise primarily from problems attributable to these disabilities (cross-national category 'A/Disabilities').

Category B: Students with behavioural or emotional disorders, or specific difficulties in learning. The educational need is considered to arise primarily from problems in the interaction between the student and the educational context (cross-national category 'B/Difficulties').

Category C: Students with disadvantages arising primarily from socio-economic, cultural, and/or linguistic factors. The educational need is to compensate for the disadvantages attributable to these factors (cross-national category 'C/Disadvantages').

While this tri-partite system helps to broadly organise national definitions, it does not help understand difference behind national definitions. In addition, it also cannot account for the fact that one child may have a disability, while at the same time be faced with problems interacting and come from a disadvantaged background. This is a major limitation, as it cannot identify the group that is most at risk for marginalisation and exclusion.

International Classification of Diseases (ICD-10)

The International Classification of Diseases is an international standard diagnostic classification for epidemiological, health management and clinical purposes. Its tenth revision (ICD-10) was published in 1990 and has been in use in member countries since 1994, the 11th revision is currently in process. The ICD-10 is used to



classify diseases and other health problems and is organised in chapter and blocks around the different body systems. In education mainly chapter 5 about 'Mental and behavioural disorders' is used.

Education is more often interested in the impact of diseases on the child's ability to participate in education rather than in the disease itself. Therefore, educational definitions of disability are often only loosely associated with underlying medical diagnosis. For example, visual impairments or blindness can be the consequence of many different underlying diseases. But in educational settings, it is not the relationship between these diseases and visual impairments that are of interest, but rather how the existing problems in seeing affect the ability to learn and communicate in the classroom.

International Classification of Functioning, Disability and Health (ICF)

The International Classification of Functioning, Disability and Health is a classification of health and health-related domains. These domains are classified from body (body functions and structures), individual (activities) and societal perspectives (participation). Since the individual's functioning and disability occurs in a context, the ICF also includes a list of environmental factors. The ICF and more recently the ICF-CY understand disability as a universal human experience rather than a fixed characteristic of a minority group and shifts the focus from cause to impact of health problems on human functioning. The list of activities and participation is organised as follows: Learning & Applying Knowledge, General Tasks and Demands, Communication, Movement, Self Care, Domestic Life Areas, Interpersonal Interactions and Relationships, Major Life Areas (Education, Work and Employment, Economic Life), Community, Social & Civic Life.

The ICF is used by WHO for measuring health and disability at both individual and population levels. It takes into account the social aspects of disability and by including environmental factors to understand the dynamics of disability, it allows the impact of the environment on the person's functioning to be recorded.

EN

Participation in Inclusive Education – A Framework for Developing Indicators presents the main findings from the second phase of an Agency project on the topic of indicators in the area of inclusive education in Europe.

The aim of the second phase was to build upon the work of the first phase and to develop a model for understanding participation within the context of inclusive education. A systematic approach was taken by developing a framework for participation, analysing existing indicator systems and identifying ways to link various data or information generated at the individual, classroom, school, local and national levels.

The report aims to provide a better understanding of the complex issues surrounding how policies and practices can help to ensure participation for children, teachers and parents. This systematic approach could also help to identify gaps in existing indicator systems and propose a way forward for the development of new indicators on participation for inclusive education in Europe.



European Agency for Development in Special Needs Education