

**COMPARATIVE AND ETHNOGRAPHIC RESEARCH ON INCLUSION:
THE CASE OF ENGLISH AND GREEK SECONDARY EDUCATION**

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Abstract

This thesis presents a comparative ethnographic exploration of inclusion in English and Greek secondary education, and at the same time it examines how comparative ethnographic research can be used for understanding inclusion. Inclusion is seen as inseparable from exclusion and both of them as relating to a citizenship and democratic discourse in education. Educational policy and practice in England and Greece are examined in a comparative way in an attempt to highlight how inclusive/exclusive discourses are both localised and part of an international discourse. The purposes of education in each socio-political and cultural context are examined in relation to knowledge/ability and discipline/behaviour discourses as presented in young people's representations of their student identities in mainstream schools. The concept of "frameworks of competence" is used to explore how participants in schools actively negotiate inclusion and exclusion.

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and my aunt Ηλέκτρα.

Part One: Defining the Research Study

Chapter One

About Texts and Stories

Presenting the text and its aims

It is common practice in the first chapter of a thesis, as well as in the first part of most academic texts, to present the topic of the text. Usually, the introductory chapter states the reasons for selecting the particular topic, the research questions, and gives information and insight into the researcher's epistemological and methodological agenda and standpoint. If one accepts that readers generally start reading a text from the beginning, then the first chapter is where the relationship between text, author, and reader, is established. The first chapter is therefore of crucial significance, because it indicates to the reader what he/she can expect from the text and, at the other end of the reading interaction, the reader forms his/her first opinion about the text and his/her expectations about what follows.

This introductory chapter has exactly this aim, to establish an initial relationship between the text, author, and potential readers, but with a difference. Its main concern is not the topic of the research study, but rather the text itself and its *multiple functions*. These functions can be distinguished in two broad categories, one concerned with the *content*, and one with the *form* of the text. Content and form together define the *genre* of a text. In this respect, this text belongs to the genre of academic writing.

Academic writing as a genre includes a wide range of different types of texts according to, for instance, discipline, medium of presentation, length and type of presentation (article, monograph, book), the status of the author in the academic community and so on. What all the above have in common is that they share characteristics in both the content and the form, which comprise the academic writing tradition and its conventions.

Discussions around academic writing have been, until recently, limited mainly to research methods textbooks. However, the nature of academic writing has been part of a current debate on what constitutes academic endeavour in general, and its purpose and ‘usefulness’ within the academic community and society.

A critique of academic texts, as the main means of reporting the process of theorising and researching, is that they are based upon and formed according to the tradition of positivism. The positivist approach to academic writing assumes that theory and research are well-defined enterprises and the process of producing them can be a linear, straightforward one in which specific steps/stages are followed. Furthermore, the textual representations of given phenomena can be

assessed according to their validity, i.e. whether they have been constructed according to 'scientific', reliable criteria. Thus texts provide (almost) the only true representation of the phenomena under study.

In this way, the text is separated both from the author and the subjects of the research and it is presented as having an internal validity due to its scientific content and form of presentation. The conventions of this type of academic writing are apparent in the language used, the structure of the text, and the division of content (introduction, literature review, methodology, presentation and analysis of data, discussion, and conclusion), which follow the linear model of the research process.

Oakley (1999) argues that "the term 'positivism' ceased long ago to have any useful function as a literal designator" (p. 156) and that many references to positivism, especially in social sciences, are made in order to establish what the writers are trying to avoid rather than an existing research paradigm. It can be argued that the current pluralism in social sciences has affected what constitutes theorising and researching. This has resulted in an attempt to demystify the research process and make as explicit as possible how the research has been constructed. Sometimes this is achieved by giving detailed accounts of the research process, or by using 'alternative' (mainly literary) forms of writing, or both (See for instance, Woods, 1999; Denzin, 1997; Van Maanen, 1995).

From form and content to the 'voice' of the text

Before explaining the reasons for including a chapter on writing in this thesis, I will attempt to highlight some of the complexities surrounding academic writing by giving a number of examples from different disciplines and perspectives, especially from the social sciences.

Starting with form, and specifically language, Baker (1992) in a textbook on translation notes that in scientific and technical writing passive structures are used to a great extent in the English language. This gives an 'impression of objectivity' and creates a sense of distance between the writer and what is written in the text. She continues that

[...] even if a writer was not particularly interested in giving an impression of objectivity s/he would find it difficult to break away from the convention of using predominantly passive structures in technical writing. The more pervasive a structure becomes in a given context the more difficult it becomes for speakers and writers to select other structures or to depict events differently.

(Baker, 1992, p. 103)

The use of the passive voice in academic writing has implications both for the form of the text and for the presentation of its content. Not all languages use the passive voice in academic/technical writing and even when they do, its use may be different or for different purposes. Academic writing is language, culturally and historically located. Its conventions may differ in different languages and cultures, or they may be expressed with the use of different linguistic techniques and practices. For example, this text is written using a combination of passive voice and first person singular narration (I). In Greek (my native language) the use of the passive voice and/or the first person plural (we) or alternatively third

person singular (the researcher) would have been more 'appropriate' and 'acceptable'. These are conventions rather than rules and their appropriateness is defined in the specific context of each text.

At a 'higher' level of form, that of style, one encounters two paradoxes of academic writing. The first is associated with the assumption that academic writing should be 'creative' and 'original' (for a discussion of originality and other criteria for assessing PhD theses see Silverman, 2000). Both creativity and originality relate to the content of the text and only to a lesser degree to its form. The paradox here is that although the production of texts is a very important activity for social researchers, their texts, in contrast with other forms of creative writing (e.g. fiction, and journalism) function predominantly as *media* of presentation and communication. What is important is what the text says rather than how it says it.

What is usually expected from a text is that it meets 'high academic standards', arguably a somewhat technical and 'static' notion, limited to the language used and separated to some extent from notions of creativity and originality.

The second paradox concerns the ways that one learns to understand and use the conventions of academic writing and to produce suitable texts. Davies (1992) describes the process of introducing students into the academic community as a 'cultural construction' which happens in academic institutions where

Overtly, the culture is organized and constructed for the realization of academic intentions. In order for students to do so they have to understand academic theories (myths) well enough to meet assessment requirements –that is, in order to succeed the students have to script stories of an academic nature which meet the demands of the lecturers

interpreting and justifying academic theories to students through lectures, using the language of the theory. In this way, students are enculturized academically.

(Davies, 1992, pp. 227-228)

C. W. Mills (1971) calls social science the 'practice of a craft'. To some extent the way that students become accustomed to the processes of that craft -at the theory, method and writing level- are similar to those of craft apprenticeship. A small part of knowledge is directly transmitted. The apprenticeship to a large extent consists of exploring and understanding the work of others and of existing knowledge. Students learn by imitating what members of the culture have produced and what has been selected to be included in the genealogies and histories of the culture (Schratz, Walker and Kamler, 1995). As Hammersley (1990a) argues

...reading plays an important (and rather neglected) role in science and scholarship. These are collective enterprises and the work of any individual researcher needs to be coordinated with that of others. More than this, though, the intellectual authority of scholarship and science depends on the communal assessment of its products.

(Hammersley, 1990a, p. xi)

But in order to master the art of the craft students need to accomplish something more than a successful imitation of the theories, language and conventions of the academic culture. They need to be able to contribute to it in a creative, imaginative, critical and reflective manner. The process through which students move from 'imitators' to 'creators' is again an implicit one (M. Morris, 1998), and sometimes it involves what Bourdieu and Passeron (1994) call the 'rhetoric of despair' (p. 3), since the conventions that students learn may be dissimilar to the ones with which they are already accustomed. Another way to describe this process may be by using the metaphor of 'ritual of passage', which refers to a

process that escapes description; a process that even people who have been successfully through have difficulty in defining (see Chapter Six).

Turning to the issue of content, I am going to concentrate on the function of writer/author in academic writing. Foucault (1991) relates writing to death in culture, which is centred on the death of the author as a person, and he suggests that

We find the link between writing and death manifested in the total effacement of the individual characteristics of the writer; the quibbling and confrontations that a writer generates between himself and his text cancel out the signs of his particular individuality.

(Foucault, 1992, p. 448)

The main convention of academic writing is the decontextualisation of the author's entity and personal experience. The author as a person with individual characteristics is disguised as a 'scientist'/'researcher', and the personal experience behind the reported 'facts' is minimised. In addition, the process of writing the text and arriving at the (provisionally) final representation of the author's thinking and research experience -which most of the time is a difficult and painfully slow process- is omitted from the text. The text becomes a personal, created in a temporal vacuum. Finally, the author's understanding, use of, and conflict with the conventions of academic writing and the ways he/she deals with them are not part of the text.

On the other hand, Foucault argues, "writing unfolds like a game that inevitably moves beyond its own rules and finally leaves them behind" (ibid. p. 448). The conventions of academic writing are in constant change. Appropriate form and content is defined according to what is produced at any given time. From the

overall textual production of a period, only a part becomes acceptable and incorporated in the academic culture and tradition. Other texts remain outside this tradition or are considered as atypical/extreme examples of it, and a vast majority ends up 'redundant'.

However, even when authors try to erase themselves from the text, or to neutralise their presence in it, their individual characteristics exist outside their text and in relation to them. Omission can be as powerful as presence. Readers do not 'read' only what is in a text, but also what is missing. They form 'alternative' texts according to their assumptions, interests, and conventions, which, depending on the position of the reader inform the 'future' of the text through the processes of marking, examining, reviewing, quoting, recommending and so on.

An example of this is when specific characteristics of an author or of a group of authors are used to explain their departure from the conventions of academic writing and even to downgrade the significance of the alternative representations they produce. Bell (1995) argues that alternative and innovative accounts of anthropology written by women remain outside the mainstream because their preoccupation with the subjectivity of fieldwork is understood as a 'feminine tendency' to engage with the 'emotional'. According to her "such work will be deemed 'women's', treated as a special case, and placed within the genre of 'confessional literature', or simply labelled 'self-indulgent'" (p. 3).

Thus, the author is inevitably 'present' in the text despite all efforts in achieving his/her detachment from the text. The –conscious or not- decisions that authors take about the way they write, determine the degree not so much of their presence in the text, but rather of their participation in it. C. W. Mills (1971) distinguishes

two types of presentation in social sciences according to how the writer perceives his/her role and his/her 'voice'

One way results from the idea that he is a man who may shout, whisper, or chuckle –but who is always there. [...]. The other way of presenting work does not use any voice of any man. Such writing is not a 'voice' at all. It is an autonomous sound. It is a prose manufactured by a machine.

(Mills, 1971, pp. 220-221)

These may be seen as the extreme positions of 'voice'. In practice, each writer needs to decide who they are –as authors, researchers, and 'voices' in the text. They need to choose the extent that they will experiment, play it safe, expose their 'self' in the text, and so on. Whatever they choose to do, they need to engage with the academic writing conventions.

Aspects of the 'voice' of the text

At this point, I would like to return to the reasons for including a text about the text in this thesis. This text is written with a specific purpose, to report a research study undertaken as part of a research degree. To do a Ph.D. degree is considered a once in a lifetime experience, a unique one, and one that changes a person forever. However, the same applies, or it should apply, to any educational experience. The main difference between most other formal educational experiences and a research degree –at least in the field of social sciences- is the individualistic character of the latter and the degree of 'control' that students have over their work.

Students are responsible, with the advice and guidance of supervisors and others involved, for all the decisions about their work. Students have control over the content, structure, time and pace of their studies. This freedom of deciding, of selecting what is the best for the research, and, of course, of making mistakes and reflecting upon them, is both empowering and frustrating at times.

At the end of the whole experience and as part of it, students are assessed. The final product, the text of the thesis, is the means by which a student's experience –at an ontological, epistemological and methodological level- is reported and evaluated. Students need to decide what parts of this experience are appropriate/necessary to be included in this type of text and for what reasons. The first aspect then of the text's 'voice' relates to the criteria used in defining what is relevant to the purposes of the text.

Furthermore, my own study is a comparative study conducted in two countries with two different official languages, English and Greek. The exchange between languages, linguistic cultures, and cultures in general has been an important aspect of the research study. The use of the two languages does not necessarily mean that they have always been 'equal'. This study was conceptualised in English, most of the literature used is written in English, most of the texts produced for the study were in English, and this text is written in English for an English-speaking audience. However, Greek is the language of the author and therefore the 'voice' of the author, together with that of half of the subjects of the study.

Trying to examine phenomena –in this case inclusion- that may or may not have their equivalent in the other language is both a theoretical and a methodological problem. As is discussed in the next chapter this study aims to problematise notions of linguistic/conceptual equivalence. It is not assumed that words or their translations are ‘neutral’.

Finally, not being an English native speaker means that my understanding, interpretation, and acceptance of academic writing conventions may differ from those of native speakers. Therefore, the second aspect of the text’s ‘voice’ is about achieving comparative representation and finding ways of balancing the two ‘languages’ in the text.

In addition, this study is about ‘inclusion’. In some respects inclusion can be seen as aiming not to impose a dominant perspective where heterogeneity, difference and conflict exist. Inclusive research has similar aims when theorising, researching, and writing about inclusion. This becomes even more pertinent in a comparative study. F. Armstrong, Belmont and Verillon (2000), writing about special education in France from both an ‘insider’ and ‘outsider’ position, reflect on these issues, arguing that even if one finds the exact translation of terms, the ideological issues surrounding concepts and meaning remain unresolved:

We need, then, to look beyond the ways in which disabilities are officially categorised, counted and legitimated, beyond the language used to talk about them, beyond the institutions which are an integral part of these processes, to the practices and values that underlie, and operate through, social systems.

(F. Armstrong, Belmont and Verillon, 2000, p. 61)

Attempting to research 'inclusion' (and exclusion) in such a way, means that one needs to explore and problematise one's own cultural and ideological assumptions and preconceptions. 'Understanding' –and in this case comparative understanding- cannot be taken for granted. The third aspect then is about how the academic writing conventions can accommodate the different levels of the research's exploration in the comparative understanding of inclusion/exclusion (see Slee, 1988b).

Finally, this study uses an ethnographic methodology. Corbett and Slee (2000) from an inclusive research perspective are critical of the field of comparative education because "it was an essentially staid and steadfastly un-reflexive area of educational inquiry" (p. 136). They acknowledge, however, that recent studies in special and inclusive comparative research have broken away from the traditional one-dimensional, policy-making, State-centred model of comparative education. As is argued in Chapters Three and Four, the long tradition of qualitative/ethnographic research in comparative education -despite the fact that this type of research has not always been the dominant mode of research in the field- is central to understanding how comparisons are constructed and legitimated.

Comaroff and Comaroff (1992) suggest that there "is a simultaneous sense of hope and despair *intrinsic* to ethnography" (p. 7). They argue that ethnography

...is not a vain attempt at literal translation, in which we take over the mantle of another's being, conceived of as somehow commensurate with our own. It is a historically situated mode of understanding historically contexts, each with its own, perhaps radically different, kinds of subjects and subjectivities, objects and objectives.

(Comaroff and Comaroff, 1992, pp. 9-10)

This understanding of ethnography –one that requires an anthropological and historical stance- allows for the incorporation of plurality into the text. However, all texts are definite in the sense that they have spatial limits that restrict what can be included in them. Thus the final aspect is about how ethnography becomes text and how its writing conventions relate to the criteria of selection for inclusion in the text.

Articulation of the 'voice' of the text

These four aspects of the 'voice' of the text make up what the text is about and what it tries to represent. They bring together the theoretical and methodological questions of the research study. One argument may be that they can be discussed and presented using the traditional forms and structures of academic writing. Glaser and Strauss (1967) argue that the form of presenting a theory can be independent of the process that was used in generating it. They continue that in order to make *theory as a process* explicit, the discussional form is more appropriate, because

...the discussional form of formulating theory gives a feeling of 'ever-developing' to the theory, allows it to become quite rich, complex, and dense and makes its fit and relevance easy to comprehend.

(Glaser and Strauss, 1967, p. 32)

In this text the process of generating 'theory' is seen as being as important as the theory itself. In order to be able to include both of them in the text, it is necessary to reassess how order and relevance are understood in academic writing.

Order is central in academic writing. What is written should tell a ‘story’, a story that has coherence and makes sense; a story which is as close as possible to the phenomena or ideas that it describes. To achieve that, one needs to put in order things that are usually complex and interconnected and which do not follow the general convention of writing that demands that a text has a beginning and an end, and that everything must be said between them. Usually this is achieved by following a specific order in the structure of the text, which may give the impression that theory and methodology/empirical research, and their entities can be separated.

In this text a different approach is used starting from the premise that the text tells two *stories*. One is the story of the topic, and is about inclusion in two countries, England and Greece. The other is the story of the study itself and is concerned with how the first story was constructed as a representation of inclusion in the two contexts. In fact, these two stories are two aspects of the same experience. They are treated as semi-autonomous ‘stories’ so as to give a sense of order and coherence to the text. Hence, the first story describes what has happened and the second one how and why it has happened.

Both stories share a number of *themes*. The word ‘themes’ is a weak form of what can be called the researcher’s obsessions. They are the issues that I have been engaged with because they really matter to me, and are constant reminders of what this is all about.

To give an example of what I mean by a theme or obsession, during this study there was a point when it seemed almost impossible to complete the research as a

comparative study. The option of concentrating on only one country would have made everything easier but in practice this was not an option, because for me the theme of comparison was not only central to the study, but it was also something that as a researcher I could not escape from. It was always present in my thinking and decisions and it was (and still is) something that I strongly felt the need to explore.

Although all the 'themes' can be found in both 'stories', the themes of this study that relate mostly to the first story are these of inclusion/exclusion, schooling, citizenship, and needs. On the other hand, the themes of the second story are the process of theorising and researching, the concept of comparisons and ethnography.

Finally, the two stories and their themes come together in a number of *issues*. Issues are concepts and notions that are present in all or most of the themes and they are the connecting elements of them. An issue, for instance, that has been presented in this chapter is the issue of language. Language was discussed in relation to the themes of theorising and researching, comparison, ethnography and inclusion. However, language is an issue that is also present in the themes of schooling and needs. For example, the ways in which 'needs' are constructed in educational settings, how different people talk about needs, and the values that are explicit or implicit in the language used to describe them (Corbett, 1994), are explored in the study.

It is difficult to present all the issues of this study by simply listing them. On the one hand, it can trivialise their significance for the research, and on the other it

can end up as a list of issues that are fashionable at the moment in the literature. However, it can be said that the issues of the study can be divided in two categories. The first one involves issues such as language, culture, social identity and role/voice. The second category includes issues such as objectivity/subjectivity, conflict/negotiation, representation and interpretation. The above presentation could be criticised as being just a word game in which different words from different lists create theoretical constructions. Wolcott (1995) in a text entitled *Making a study "More Ethnographic"* gives the advice:

If you are at a loss for how to orient your analysis in an ethnographic vein, try slipping the adjective 'cultural' into your every thought and most of your sentences: *cultural* barriers, *cultural* context, *cultural* setting, *cultural* (or *culturally appropriate*) behavior. The phrases you generate may not always make sense, but the exercise will keep your commitment to cultural interpretation paramount in your thinking. I also suggest that you use only the adjective form "cultural" and avoid the habit of making vague, unspecified references to "culture".

(Wolcott, 1995, p. 95)

However, in this text the aim is not only to make connections between a set of concepts. The aim is to explore how these connections are made and to examine the assumptions and preconceptions that lie behind them, and thus to explore these issues in a meaningful way and in relevance with the themes of the text.

Deciding what to include in each story moves the discussion to the issue of relevance. Relevance is what gives internal coherence to the text, and creates to some extent the 'illusion' that a complete 'story' has been said. Woods (1996) argues that

...one often does research in part to discover more about oneself. This is not to say that it is self-indulgent, but that it is chiefly through the self that one comes to understand the world. In turn the discoveries one

makes reflect back upon the self, which then feed back into research, and so on.

(Woods, 1996, p. 1)

Everything in relation to the study (and beyond) can potentially be included in the text. The text as the result of the research process is also the outcome of an 'evaluation'/selective process which decides what is relevant to the text. Even the most mundane details in a text have been through this selective process and have been considered as 'relevant', as adding something to the overall story (or stories) of the text.

To give an example from this study, the information that I was a smoker during the research process can be considered as 'irrelevant'. However, during the fieldwork in England I was spending time in two staff rooms, the non-smoking and the smoking one. This meant that I had access to two groups of teachers and two sets of information about what is said in staff rooms. In addition, hanging outside the schools that participated in the study to have a cigarette, became almost an observation 'technique', a five-minute period of observing what was going on outside the school building. This kind of relevance can be described as informative relevance. When the information given adds something to the text, or it gives a new way of approaching it, then the information is relevant.

A different level of relevance can be called 'epistemological relevance' and it is much more difficult to define. This kind of relevance is about the researcher's assumptions in relation to the aims and functions of theorising and researching. It cannot be simply understood and criticised according to some pre-existing criteria about what is appropriate and relevant in academic writing, but rather it must be considered in connection with what a specific statement is trying to

achieve in the text. This type of relevance does not only refer to the 'data' of the study. It is connected also to the researcher's ontological position and personal experience of research. Apple (1996) argues that

As so much feminist and postcolonial work has documented, the personal often is the absent presence behind even the most eviscerated writing, and we do need to continue to explore ways of heightening the sense of the personal in our 'stories' about education. But at the same time, it is equally crucial that we interrogate our own 'hidden' motives here.

(Apple, 1996, p. xiv)

Self-reflection and criticality are central in challenging the researcher's preconceptions but they are limited to the extent that the 'self' that employs these techniques is the same 'self' that they are applied to. In this text this is described as the 'uneasiness' of engaging with the research endeavour, an uneasiness that affects all stages of the research process, and the 'researcher's identity'. This uneasiness is evident and discussed throughout this text.

To sum up, this text does not try to present an alternative way of academic writing. It attempts however, to present the stories, the themes and issues of the text in their interconnectedness. It does not present a different order of telling a story but it questions the form and conventions of academic writing. It is not an autobiographical text or a literary attempt at academic writing, but it does not assume that writing is an unproblematic process that takes place outside the 'self'.

Structure and content of the text

This thesis has four parts. The first part aims to define the research study. The following chapter presents my personal engagement with inclusion and describes how this study was conceptualised. Chapter Three is a critical overview of comparative education and of the different comparative projects of the field. Chapter Four overviews special/inclusive comparative research and examines how it relates to the field of comparative education. In this chapter social cartography is used in constructing a comparative framework for exploring inclusion.

The second part presents how this study was undertaken and the relation between the theoretical conceptualisation of the study, methodology, and research practice. Chapter Five uses two ‘critical incidents’ to give some insight in the research practice and to explore the complexity and ‘messiness’ of research. Chapter Six explores how the theoretical framework of this study has influenced methodology. The concept of the ‘elusiveness of inclusive methodology’ is used in this exploration. Finally, chapter Seven discusses the research methods of this study, especially observations and the students’ interview schedule, as the analytical means for producing data and at the same time as methodological ‘unassuming’ activities.

Part Three maps inclusion in the two contexts trying to follow a multi-level analysis. Chapter Eight presents the two contexts using the method of successive presentations and attempts to see the schools of this study within their wider context. Chapter Nine attempts to present the structure of the two educational systems and schools in relation to recent reforms. This chapter discusses also

inclusion/exclusion in the two contexts in relation to Marketisation of education. Chapter Ten focuses on Greek students' activism and tries to examine the relation between policy-making, students' participation and dominant discourses of childhood and citizenship.

Part Four examines inclusion/exclusion in schools based on students' perspectives in relation to their student identities and knowledge and discipline discourses. Chapter Eleven explores students' identities and how they are constructed within specific knowledge/ability discourses. Chapter Twelve focuses on students' understandings of discipline and behaviour. Chapter Thirteen brings knowledge and discipline together and explores how students as active social actors in schools understand and negotiate inclusion/exclusion in relation to specific 'frameworks of competence'. Finally, Chapter Fourteen tries to bring the two stories of this thesis together.

Chapter Two

Struggling with Inclusion: The Conceptualisation of the Research Study

Introduction

In the introductory chapter some of the reasons that a text -the process of writing and the final text/product- can be considered as problematic were mentioned. The same topic is explored further in this chapter, by considering why the production of knowledge (in this case the production of academic/scientific knowledge) is problematic. This chapter is an attempt to present my *uneasiness* with what I am doing as a researcher and how I view the research process in general, and this study in particular. It does not attempt to resolve this uneasiness but rather to incorporate it in the text, to reflect its part in the study.

This chapter is an account of my understanding of inclusion and of the main research assumptions of this study. It is a 'reflective' account because it presents my on-going 'struggle' with inclusion, my attempt to understand inclusion, and how inclusion has been conceptualised in this study.

Inclusion can be defined in a number of different ways. For instance, inclusion in education (keeping in mind that inclusion is not only an educational concept) can be seen as a practice, curriculum or pedagogical issue (Tilstone et. al, 1998; Thomas et. al, 1998). It can also be examined as ‘appropriate’ or ‘successful’ for specific categories of ‘special educational needs’, or for ‘all children’ (Ainscow, 1999). Inclusion can be seen as a structural issue of educational systems (Pijl et al., 1997) or as a value or ideological issue (Clark et al, 1998). It can be connected to the experiences of participants in inclusion (Allan, 1999; Vlachou, 1997) or to policy making and educational reform (McLaughlin and Rouse, 2000). Inclusion can be researched as an international tendency or ‘aim’ (Sebba and Ainscow, 1996), or as a human rights discourse (F. Armstrong and Barton, 1999). Finally, inclusion can be seen as ‘rhetoric’ (Slee, 1998), and even as a ‘problem’ (Kauffman, 1999).

The above list is neither complete nor final. It can be seen as endless and at the same time historically bound. It merely gives an overview of aspects of (current) research on inclusion. A number of parameters can be added to it, for instance specific educational systems or ‘components’ of them, such as special/general education or primary, secondary and tertiary education.

Another way to construct this list is by considering how these aspects of inclusion are examined, starting from the fields/disciplines (education, sociology, psychology, history and so on); moving on to the perspectives and approaches used (for instance the social model of disability and the effective schools approach) and ending with methodology.

Finally, the researchers' aims and positions can be added to this list. As Clough and Barton (1995) argue about research in special education and disability,

[...] research itself creates –rather than merely studies- the phenomenon of special education/disability, and hence the constructs which researchers themselves bring to the work are important determinants not only of the success of the study itself but indeed also of the nature and the direction of the field itself.

(Clough and Barton, 1995, p. 3)

Therefore, inclusion as it happens 'out there' in schools and other educational institutions cannot be separated from inclusion as it is examined and researched and vice versa.

The mystification of inclusion

This chapter locates inclusion (and exclusion) as it is defined in this text within the inclusive education field, by giving an account of my personal 'struggle' to understand inclusion/exclusion. I was introduced to the inclusive discourse in the middle 1990s when I came to England as a postgraduate student. At that time inclusion as a term was not used in Greece and even nowadays, when it is used, it is not usually translated. An example of an attempt to translate inclusion is as "co-education" [συνεκπαίδευση] (Tafa, 1997). This translation in my opinion is problematic in a number of ways.

Firstly, it has a very limited scope since it has a strictly educational meaning. It also implies that there are two or more groups of children that are educated together, and thus that there are 'differences' between these two groups of children. The problem with that is that the assumptions about the qualitative

differences of these groups are not explicit. These differences are not challenged but rather they are reinforced by the term. In addition, 'co-education' cannot convey the multi-layered expressions of the word inclusion, for instance in the inclusion/exclusion continuum, in inclusion in society, or even 'social inclusion'. Finally, it minimises the 'ambiguity' of the term inclusion by defining exactly where it happens, e.g. according to this definition inclusion cannot happen in a special school.

The fact that 'inclusion' as a word and term does not have a 'working translation' –a translation that can be considered as generally accepted- makes it difficult to 'translate' and 'incorporate' what can be called the 'Greek inclusive discourse' to the 'international inclusive discourse'. In addition, inclusion remains a 'mystifying' term, a term which cannot be completely understood and therefore cannot be applied to the Greek context. This characteristic means that the concept cannot be seen critically since some aspects of it remain 'hidden'.

For a long period of time I struggled to define inclusion as a term and also to position myself in relation to inclusion due to the fact that I was 'mystified' by it. Inclusion of course was not the only new term that I came across and tried to understand at this period, but for a number of reasons it was the most problematic for me.

One reason was that I could not grasp the differences between 'integration', which was the existing model of mainstream education for children with special educational needs at that period, and 'inclusion'. I believed that I understood 'integration' because integration was the accepted translation of what was

happening in Greece in the field of special education. Thus, integration was the 'known' and inclusion was the 'unknown'.

In a simplistic way, in order to accept the 'unknown' I wanted to see not only an example of what integration and inclusion are (the differences between the two terms), but also an example that could at the same time prove that inclusion is 'better' or 'more' than integration. I was seeking a concrete and straightforward definition of inclusion, which could differentiate 'inclusion' from a number of other special education terms and which also could justify the introduction of the 'new' (unknown) term into the field. However, the discussion of the 'pros and cons' of integration/inclusion can be a futile exercise (Hellier, 1988), especially when it happens in a contextual vacuum without recognising that there are many integrations/inclusions.

At the same time, I was suspicious of inclusion. I felt that inclusion has the potential to be imposed on the Greek educational system in a way that may not take into account the characteristics of the particular educational system by what can be called intellectual and policy-making imperialism (Corbett, 1998).

When I came across texts in which special education and provision for 'special educational needs' in mainstream schools in the Greek context were translated as inclusive provision (for example, Lampropoulou and Padelidou, 1995; O'Hanlon, 1995a), I felt that my fears for possible misrepresentation and misunderstanding were justified. I felt also that what was happening in Greek education was 'translated' to a dominant language and educational discourse not

in order to gain legitimacy and authority, but just to gain the basic ‘right’ to participate/exist in this discourse.

However, at the same time that I was struggling with inclusion I did not question other terms that had the same or similar problems in their ‘translation’ (for instance, ‘integration’)¹. My explanation, in retrospective, is that I experienced the discursive and policy-making transition from integration to inclusion. This meant that the inclusive discourse at that time was struggling to find its position in the field of special education and beyond, and possibly it was easier for me to question the ‘authority’ of inclusion while this authority was not already established. As Corbett (1993) argues, “truths change with new conceptualisations and old truths become cumbersome burden” (p. 549).

On the other hand, I was fascinated by inclusion as a term. My impression was that inclusion could open new ways of understanding education. It was a term that could move the field beyond ‘special education’ to incorporate ‘difference’ and ‘plurality’ in schools. It could give a critical insight to both special and general education. One of the aspects of inclusion is that it does not see the presence of children with special educational needs in mainstream settings as the ultimate goal. Inclusion aims to transform these settings to be, by definition, inclusive for all children (Barton, 1995; Stainback and Stainback, 1990). This aspect of inclusion was not completely ‘unknown’ to me. It has similarities with

¹ A term that I had difficulty with was ‘special needs’ as an encompassing term –what Norwich (1993) calls a ‘super-label’. Coming from a background where ‘categories’ of disability/special needs are used, I found difficult to understand its role when in practice children are identified, assessed and provision is made for them, according to specific disabilities, or educational needs. As Tomlinson (1985) argues “the whole concept of special needs is ambiguous and tautological” (p. 164).

the “ένταξη” discourse in Greece, which at the time I was translating as the ‘Greek integration discourse’² (see, Vlachou-Balafouti and Zoniou-Sideris, 2000a; Azizi-Kalatzis et al., 1996; Zoniou-Sideris, 1996)

Zoniou-Sideris (2000a) argues that the concept of ‘ένταξη’ has had a clear political dimension –which possibly was missing from the implementation of ‘integration’. For Zoniou-Sideris (2000a) ‘ένταξη’ comprises the conceptual meaning of ‘inclusion’, which she proposes can be translated in Greek as ‘συμπεριληπτική εκπαίδευση’ and/or ‘εκπαίδευση του μη αποκλεισμού’. She also gives a number of reasons for which the introduction of the term ‘inclusion’ in the Greek context can be problematic; the process of ‘ένταξη’ has been based on the educational, social, and cultural conditions of the Greek context and its realisation –although limited- has not ‘failed’; the Greek disability movement has been involved in the ‘ένταξη’ discourse taking at times both negative and positive positions; in Greece ‘ένταξη’ is not accompanied by negative practice/experience and thus negative connotations. For all these reasons, the a-critical introduction of the ‘foreign’ term of inclusion could be potentially problematic³ (Zoniou-Sideris, 2000a, pp. 38-43).

² In Greece there was a similar debate between the terms ‘ενσωμάτωση’ and ‘ένταξη’. The first one is more restricting implying the ‘accommodation’ of children with special educational needs in the majority population, while the latter implies the equal participation of all children in educational settings. See also Skrtic (1991) for the debate between Education for All handicapped children and Regular Education Initiative, and Fuchs and Fuchs (1994) for the debate between Regular Education Initiative and the inclusive movement in the U.S.A.

³ An example of the relation between different terms can be found in a written communication of the Ministry of Education and Religious Affairs (2000) to schools in relation to the ‘People with Special Needs International Day’, where all the three terms «ενσωμάτωση», «ένταξη» and «συνεκπαίδευση» are presented together.

Getting to know inclusion

Although I tried to limit the discussion of inclusion to inclusion as a term, I am aware that in the above discussion it is possible to identify a number of different definitions of inclusion. It can be argued that part of my confusion about inclusion was due to these differences in defining the term. All the possible definitions of inclusion constitute how the word is understood in the inclusive discourse. To select a 'good' definition –a definition with which one agrees- and ignore other definitions does not confine inclusion to this definition, and does not eliminate the complexities/contradictions of the concept and phenomenon of inclusion (Corbett, 1996, see also Low, 1997, who defines three types of 'inclusivists', "hard ones, soft ones and stupid ones", p. 77).

For this reason, it is necessary to distinguish between inclusion as a word, term, concept, phenomenon and discourse. The *word* inclusion combines all the possible meanings that the word can have in different contexts and different historical periods. In that sense inclusion does not refer only to education and more generally to the inclusion of (groups of) people in society, but it has also a number of other meanings. Inclusion as a *term* in education, in other fields of study and in society combines all the meanings that the word can have in the specific context and throughout a specific historical period. Therefore, it is safe to argue that inclusion as a term in education has been used since the beginning of the 1990s.

The *concept* of inclusion refers to the question 'what is inclusion?' and the *phenomenon* of inclusion refers to the question 'where and how is inclusion expressed?'. *Definitions* of inclusion provide specific understanding of inclusion

as a concept and/or phenomenon. All the above *constitute* the discourse of inclusion as it happens at different sites and levels of the educational and societal 'arena' (see Fulcher, 1989).

To return to my personal difficulty and struggle with inclusion and how it led to the conceptualisation of this study, I am going to explain how I came to reconcile myself with the term and how the term is used in this comparative study. My first reaction to inclusion was to perceive inclusion as the 'unknown' (something I did not know) and the 'alien' (something I did not have experience of), although I had similar experiences (this of 'ένταξη') to help me in approaching the term. The justification of this reaction was the lack of 'translation' of the term. Yet, as Venuti (1998) maintains

A translation always communicates an interpretation, a foreign text that is partial and altered, supplemented with features peculiar to the translating language, no longer inscrutably foreign but made comprehensible in a distinctively domestic style. Translations, in other words, inevitably perform a work of domestication.

(Venuti, 1998, p. 5)

The request for a 'translation' then may facilitate the communication between the two languages and educational discourses and make inclusion a 'known' term in Greece, but it does not necessarily solve the issue of inclusion as an 'alien' term. 'Translation' hides also the danger of a 'counter-domestication', which means to translate the Greek reality as inclusive in order to 'accommodate' it in the 'known', as it is understood in the English-speaking context. The question then is whether it is possible to have alternative understandings of inclusion, which can be applied in a number of contexts without leading to 'alien', 'imposed' and

monolithic/dominant representations in these contexts. The other side of this question is whether it is possible to have an understanding of inclusion that transcends localised definitions, and at the same time incorporates them.

In order to find an alternative understanding of inclusion, I questioned my pre-assumption that inclusion was something 'alien' to the Greek educational system. I tried to connect 'inclusion' to my own experiences in different educational settings and in different roles. I started with my experience as a special/support teacher in an 'ένταξη' project in Greece and then I moved further back to my experiences as a university student learning about special education and forming an ideological position in relation to it. However, the main part of the exploration of my past experiences was focused on my experiences as a student in mainstream schools.

I tried to check my own past experiences with my 'new' knowledge and to see how this new knowledge was perceived according to my past experiences. At the same time, I tried to find out how those past experiences constructed my 'reality', in which 'inclusion' could not easily fit. I was doing what Okely (1996) calls exploration of the "abstractions contained in our anecdotes" (p. 149) by connecting biography, history and society (Mills, 1976).

The following example tries to illustrate the above process. This example was selected because it is 'atypical' of the information usually given in comparative studies. It is about an issue that may be considered of no importance when one examines two or more educational systems (see next chapter).

In an article entitled *'Corresponding to difference at Hirst High'* (F. Armstrong and Booth, 1993) the process of integrating a group of students categorised as having 'severe learning difficulties' in a special needs department of a mainstream school, is described. When the students were asked the reasons they liked their new school, their answers included "the uniform, more friends, better classrooms and the dinners" (ibid. p.121). The mother of one of the students, commenting on the positive outcomes of the move, made a further reference to the 'uniform':

I think it's the fact that she goes to a school where everybody else goes as well and even the very basic thing of wearing a uniform, she's quite pleased about. In some ways I've always thought uniforms made everybody look too much the same, but it's something they all seem to want to do, and I think the fact that Katy could be seen to be wearing a uniform made her feel, 'Well, I'm wearing one too'.

(Armstrong and Booth, 1993, p. 130)

It was very difficult, for me, to understand how the students perceived the 'uniform' as a symbolic expression of their participation and inclusion in the school.

In my experience the 'uniform' was the means to impose a particular type of homogeneity on children and young people, to distinguish between girls and boys constructing specific gender representations, and to control by punishing any possible disobedience to the uniform requirements. The 'school uniform' is a good example of how decades of political and social unrest in Greek history had affected education, since legislation about 'uniform' changed almost every time the political situation changed (see Dimaras, 1990a; 1990b). The symbolic power of the 'uniform' is not only part of the history of education but also of the Greek popular culture. In a number of popular films of the 1960s and 1970s the

'uniform' referred to the ways that young people rebelled by expressing their culture, sexuality and individuality. Of course these images were ambivalent, portraying both positive and negative pictures of young people since, as Sibley (1995) suggests, "children can be simultaneously pure and defiled" (p. 64).

When I was in primary school in the middle 1970s, the 'school uniform' was restricted only to girls, creating a perception of 'domestication' for half of the school population and an image of freedom and choice for the rest (see, Igglesi, 1993, pp. 109-110). It was completely abolished in the early 1980s, at the time that major education and social reforms were taking place, reforms which were perceived as promoting the 'democratisation' of the state and its institutions and equal rights and opportunities (Kazamias and Kassotakis, 1995).

Having this particular experience of the 'school uniform', it was difficult to appreciate and accept its symbolic inclusive value in the above example. To do that, I had to question the generalisations that I made from my own experience and to try not to impose my pre-assumptions to a different situation. In doing that I was able to 'understand' how the 'uniform' was perceived as an attribute of inclusion, of belonging in a group for a number of students. At the same time this enabled me to find attributes that may have a similar function in the Greek context. For example, the lack of a 'uniform' may be perceived as an inclusive attribute. In this case, the significance of the attribute is defined according to students' 'sub-cultures' and the dominant discourse of (appropriate) appearance. Therefore the 'uniform' can be perceived as inclusive because of its symbolic value of constructing an identity of 'belonging' and at the same time, it can be

seen as exclusive because the attributes of this identity are imposed and function as a means of control. The 'uniform' is an example, which highlights the complexities of the process and phenomenon of inclusion/exclusion. Despite the fact that the uniform in the above example was not used intentionally as a process of promoting 'inclusion', it was a manifestation of the phenomenon of inclusion. This manifestation, however, might suggest the lack of 'stronger' attributes of inclusion and it cannot be seen as 'static'. The uniform in neither context can be seen solely as inclusive or exclusive.

At that stage, I started also to question a lot of the comparative research, in which there is no information about what happens in the everyday world of education. Reading texts that were concerned with the Greek educational system amongst others, I felt that my experiences as a student and teacher were not there. As Booth and Ainscow (1998) argue:

International studies, which seek findings that have global significance, indulge in oversimplification of educational processes and practices, and ignore problems of interpretation and translation. Alternatively, studies may assume the existence of a single national perspective, constructing an official version of events rather than reporting the conflicts of interest and points of view that arise in all countries. In these ways important differences between and within countries are omitted from study and debate.

(Booth and Ainscow, 1998, p. 1)

Furthermore, a lot of comparative as well as single country research is based upon the assumption that education elsewhere is 'better', that the 'problems of education' in other countries, which usually are described as more 'advanced', are 'solved' (see Bamboukas and Hourdakis, 1997). This also informs the rhetoric of policy-making within educational systems as well as the experiences

of the participants within them. For example, in my initial understanding of inclusion, it was something that the Greek educational system (and I) do not have/know in contrast with others that know/have it. Thus questions about the similarities that can be drawn between the notions of 'achievement' and 'competition' within and across educational systems are raised.

Getting to understand inclusion

From the above it becomes apparent that my understanding of inclusion has developed in a comparative framework. This framework is comparative in two ways. It does not see inclusion in 'isolation' but in relation to 'exclusion'. It also sees inclusion/exclusion 'in context', as being defined by where they take place. This framework has then a number of assumptions.

Firstly, inclusion and exclusion can be seen as a continuum of processes (Booth, Ainscow, Dyson, 1997) that take place at all levels of the education arena. The expressions of these processes, the meanings they have for the participants, and the ways that they are legitimised, challenged and negotiated may differ in different contexts. Trying to examine inclusion/exclusion in one country/context using definitions that are constructed in another may produce a distorted representation.

This does not mean that research from one country cannot inform research in other countries, or that general definitions of terms and concepts cannot be applied elsewhere. It means however that when one examines the phenomenon of inclusion in one country from a viewpoint gathered from a different context, it is

very possible to miss what is actually meant by inclusion in the context under study.

Secondly, the discourse of inclusion can be seen as part of the discourse for ‘a democratic education’. Oliver (1996a) argues, “the education system has failed disabled children in that it has neither equipped them to exercise their rights as citizens nor to accept their responsibilities” (p. 79). He adds that integration/inclusion is not a technical issue but an issue of ‘education for citizenship’. When the understanding of inclusion is limited to a process of accommodating students previously excluded from mainstream schools, without taking into consideration who is deciding their ‘inclusion’ and where and how they are ‘included’, the discourse of democracy in education is restricted.

Educational systems have historically been sites for struggle around citizenship and democracy (Carr and Hartnett, 1996). Efforts for participation, equality and inclusion in education can be traced in all mass educational systems alongside selection, inequality and exclusion (D. Armstrong, 1998; 1999). Therefore inclusive practices and struggle for inclusion can be found even in educational systems where the term ‘inclusion’ is not used to describe these practices and struggles. Bernstein (1996) describes three rights for democracy, ‘enhancement’, ‘inclusion’ and ‘participation’. According to Bernstein

The second right is the right to be included, socially, intellectually, culturally and personally. Now, this right to be included is complex because to be ‘included’ does not necessarily mean to be absorbed. Thus the right to be included may also require a right to be separate, to be autonomous. Inclusion is a condition for *communitas* and this right operates at the level of the social....

(Bernstein, 1996, p. 7)

Furthermore, it can be argued that the right to be included and inclusion in general, is not a predefined state but rather one that is constantly contested amongst participants. It should not be confined to a specific group of children and young people. All children and young people are subjected to inclusion/exclusion policies and practices during their schooling. However, there are quantitative and qualitative differences in inclusion/exclusion in how individuals and groups of children experience them.

Looking back on my experiences as a student in Greek schools I identified a number of ways in which inclusion and exclusion were happening. Students and teachers were both 'included' and 'excluded' by structures of the educational system but also by decisions made by individuals (both teachers and pupils) in the school setting. Inclusion and exclusion practices were negotiated and challenged and all the participants were actively defining and redefining the meaning of inclusion/exclusion.

In a paper entitled *Inclusive Education: The Greek Experience*, Lampropoulou and Padeliadou (1995) suggest that

...all major developments in the area of special education, and specifically of inclusive education have been introduced by the government in an attempt to address the needs of a special population of students and to assuage immediate political expediency, rather than after systematic and long-term planning.

(Lampropoulou and Padeliadou, 1995, p. 58)

This extract is problematic, as was already mentioned, because no government in Greece up to 1995 (when this article was written) introduced any *inclusive education* legislation. However, the Greek educational system at that period had a

legislation framework that promoted the education of children with special educational needs in mainstream settings. However, at the same period a dramatic expansion of 'special provision' in the form of 'special classes' took place (Zoniou-Sideris, 2000b). This 'contradiction' relates to the particularities of the Greek special education. In this case, the expansion of 'special education' cannot be understood without taking into account, for instance, the fact that established State provision for special education is a relatively recent phenomenon in which segregated and integrated models of education appeared almost at the same time (see Chapter Eight).

Thus, what it can be argued is that elements of the Greek educational system can be examined as having *inclusive/exclusive dimensions*, as facilitating or not the participation in education and creating conditions that allow different forms of inclusion/exclusion to take place.

Finally, from the above it becomes clear that in this text's definition inclusion is not a process, in which some groups –especially groups of students- are the 'subjects'. Following a citizenship in education discourse that includes children as social actors may help to avoid this pitfall. However, to acknowledge that all participants in educational settings are active 'social agents' in the construction of 'inclusion' (and exclusion) is only one aspect of this understanding of inclusion. The relative 'power' of individuals and groups is not defined only by the fact that they participate in specific roles in the school setting. Norms and values about the role and function of schools as autonomous organisations within society, as well as dominant cultural, religious, ideological beliefs and structural characteristics of

schools, are all shaping the 'arena', where meanings are negotiated (Christensen and Rizvi, 1996).

Inclusion -as everyday practice but also as an ideal state or 'utopian' goal- is constructed in educational settings in interaction with the wider context in which the settings belong. In such a definition everything is potentially of equal importance: from a major educational reform to the number and the state of the toilets in schools, from the social and cultural context to the degree that teachers and students feel that they participate in decision-making.

Up to this point I have presented how I came to a personal understanding of inclusion/exclusion through a process of struggling with the term, the concept and the discourse of inclusion, in which my new and past experience influenced the conceptualisation of the study. I am aware that this process may seem to be 'self-indulgent'. However in the past I have used this process not only as a constant exercise in self-reflection, as a questioning of my own understanding of concepts, but also as a methodological tool during fieldwork in both countries. Gordon et al. (2000) argue that, "in memory work shared cultural codes can be tapped" (p. 55). Finally, this process of moving between present and past, educational systems, schools, and the literature influenced the way I understood theorising and researching. In the process of understanding inclusion/exclusion I was becoming aware of how my experience, and my ideological beliefs and values were influencing the way that I was approaching new concepts, a different education system, a different culture and so on.

The conceptualisation of the study

The above attempt to define and examine inclusion/exclusion means that the conceptualisation of the research study should be able to address inclusion/exclusion as far as possible in its complexity. In research terms this means that in each context both the concept and the phenomenon of inclusion in the continuum of exclusion/inclusion, should be examined at different levels of the educational and societal arena as part of the inclusive discourse.

At the same time ways to explore the 'dialogue' between the two contexts should be found. The word 'dialogue' is used in order to describe the research relations between the two units of comparison (England and Greece). These research relations do not try to establish which system is 'better' as far as inclusion is concerned or to simply identify similarities and differences between the two systems. Neither do they attempt to define 'good practice' in an abstract way, which does not take into account the context, the purposes and the structural characteristics of each educational system.

The aim of this 'dialogue' is to make connections between the two educational systems, to find out whether the 'obvious' similarities and differences between them are really so 'obvious' and to explore the influence of these similarities and differences in the construction of inclusion in each context.

The main assumption underlining 'similarities and differences' in this study is that, as Tomlinson (1982) argues, special education has the ideological function to control the smooth working of general education, which is unable or unwilling

to educate a big part of the school population. Special education is only one of the ways in which children are differentiated or selected in education. These ways of selection are internal characteristics of general education and they can be found in the organisation of schools, teaching methods, curriculum, and processes of assessment and examination (Apple, 1996). The exclusive practices of general education and how these practices function and are legitimated in a given educational system (Slee, 1998) are central in order to explore the relationship between general and special education and the influence that this relationship has on the conceptualisation of 'inclusion'.

The comparative implication of this is that different educational systems -because of the specific objectives that they have in the socio-political, economic and cultural contexts in which they exist- may have different ways of selecting and excluding students, as well as of including them. Therefore, special education may also have evolved in different ways in different systems.

Additionally, the discourse of needs has a central role in the understanding of the relationship between special and general education (Barton and Oliver, 1992). How needs are understood influences the provision made for these needs as well as which groups are defined as having (special) needs and by whom and where these needs are catered for. The Social model of Disability challenges the perception that the 'needs' of children are internal, individual characteristics which leads to the notion that needs are constructed and defined by the social environment (Barnes, 1997; Oliver, 1996b; 1990; Morris, 1993). At a comparative level, different educational systems not only respond in different

ways to needs and allocate them accordingly in general and special education, but also they may 'recognise' different needs and thus, what is defined as a 'special educational need' in one system, may be not recognised as such in another (in relation to disability, see Saul and Phillips, 1999).

A discourse of needs in which one tries to answer the question of how and why 'needs' are constructed in general education cannot avoid examining the notions of knowledge/ability and discipline/behaviour. What is considered as 'normal' in schools and how students are compared and categorised according to their individual characteristics and the expectations of teachers, are linked to the creation of dichotomies (Slee, 1993) such as normal/pathological, good/bad, appropriate/non-appropriate. However, in order to examine how social identities are constructed, negotiated and challenged in the social context of schools it is necessary to keep in mind not only the relation of the concept of disability to these processes but also those of gender, race, class, and culture.

The concept of needs is also connected to the vested interests of professionals who are responsible for identifying, assessing and providing for these needs, and of other involved groups such as parents and the movement of disabled people (Fulcher, 1989). The relationship amongst all these groups and their power positions has also a comparative dimension since the provision made by different systems and the 'participation' of different groups in policy-making may differ as well.

Finally, the relation between educational systems and the wider context not only affects general and special education, but also the position of these contexts at an international level. The globalisation of education, the influence of multilateral

organisations such as UNESCO, the OECD and the EU, and international discourses of education are factors that may be involved in policy-making. The process of policy initiation, implementation and negotiation and the distinction between written, stated and enacted policy (Fulcher, 1989) is another comparative dimension. Furthermore, examining the communication and exchange between educational systems may answer the question as to why different systems have similar developments and may also challenge the assumption that these developments are 'natural'.

The notions of 'schooling' and 'needs' inform the relationship of general and special education. Both needs and schooling can be described as having changing meanings in different contexts and periods and as such they are political, ideological and historical discourses. The exclusive and inclusive practices in general and special education and the way they are located within a wider national and international context can give comparative information about the ways that the meanings of schooling and needs are constructed and how inclusion is defined. Inclusion/exclusion, hence, can be found both in 'general' and 'special' education and in their interaction, both within and outside the educational system, and across educational systems.

As Slee (1998) argues, "for many, inclusion connotes a linguistic adjustment to present a politically correct facade to a changing world" (p. 131). This leads to an 'inclusive rhetoric' which can be found both in national policies and practices and in the literature/research of inclusion. As Clark et al. (1995) claim the inclusive discourse is not a value-free one. The values associated with inclusion

determine the way that inclusion can be achieved and can be researched. They continue that these values constitute the basic differences between different perspectives. Sometimes these values are not stated and inclusion is presented as free from values and assumptions, and more as a 'technical' issue rather than as a theoretical one. When research does not question both its own assumptions and the rhetoric of inclusion, it cannot achieve a critical understanding of inclusion/exclusion in the system(s) under examination.

Therefore, according to this theoretical framework the right to a common education for all pupils cannot be seen as having an unquestionable validity but rather as being an ideological position which needs to substantiate its validity and meaning in the democratic discourse of education (F. Armstrong and Barton, 1999). Insofar as educational systems are conceptualised as mechanisms of control and selection, according to -among other things- particular types of ability, behaviour and needs, then inclusion has a particular content of reference. Furthermore, both inclusion and exclusion cannot be understood only in terms of the literal implementation of the 'right' to be in a particular educational environment, but more in terms of the significance that this right has to the participants in these processes.

In conclusion, from the above discussion of the theoretical framework of this research, three general aims of this study are formulated:

- To explore the concepts of inclusion/exclusion and their relationship to changing social identities in the context of a citizenship/democracy discourse;
- To explore the concepts of inclusion/exclusion in relation to changes in the organisation of schooling; and
- To examine the concepts of inclusion/exclusion in a cross-national context

From these aims a number of research questions concerning inclusion/exclusion can be asked:

- For what reasons are inclusive practices introduced and how are these reasons connected to different discourses of ‘needs’ and ‘schooling’?
- With what groups of pupils are inclusive practices concerned and what are their objectives in relation to these groups and the educational system in general?
- What are the exclusive practices that take place in the same context as inclusive practices?
- Does any conflict occur between inclusive and exclusive practices and for what reasons?
- Is the process of inclusion met by resistance and if yes, for what reasons and by which groups?

To sum up, this chapter has presented a short account of how my understanding of inclusion/exclusion has developed. This account has made references to some of the ‘themes’ of the study (inclusion/exclusion, comparison, theorising and

researching). Two main assumptions were formulated for defining inclusion/exclusion. Firstly, inclusion/exclusion is considered as a value/ideological concept. The phenomenon of inclusion/exclusion –processes and practices- as it takes place in different educational/societal contexts, relates to how the concept of inclusion/exclusion is defined in these contexts by all the participants involved.

Secondly, inclusion as a discourse can be seen as part of a ‘democratic/citizenship discourse in education’. Inclusion/exclusion then can be explored even in contexts where the term inclusion is not used, and it refers to general education as much as to special education. To some extent, special and general education as a clear ‘dichotomy’ is questioned by the inclusive discourse.

Having these assumptions as a starting point, three research aims and a number of research questions were articulated which bring together the ‘themes’ of schooling and needs.

Chapter Three

Mapping the Field of Comparative Education

Introduction: Comparative Education

The previous chapter presented a framework for conceptualising inclusion/exclusion in a comparative manner. This chapter focuses on the comparative aspect of the study by locating the study in the field of comparative education.

Comparative education is both a method and an object of study (Halls, 1990). For Crossley and Broadfoot (1992) comparative education is a

...multi-disciplinary field that draws largely upon the theories and methods of other disciplines. It is, however, a distinctive field of study with its own perspectives, concepts and concerns.

(Crossley and Broadfoot, 1992, p. 105)

The boundaries of comparative education as a separate discipline are not clear (Halls, 1990). Two reasons can be identified for this. Firstly, comparative educational research is not restricted to the field of comparative education. Research that is in essence and content comparative takes place outside the field by researchers who do not necessarily define themselves as comparative

educationalists. The example of special/inclusive comparative research, which is located in the field of special/inclusive education, is discussed in the next chapter.

Secondly, any research can be seen as comparative since 'comparison' constitutes an element of logical reasoning and as such is used in organising, taxonomising, categorising, and most importantly theorising scientific knowledge. In the social sciences 'comparison' is one of the basic methods used, even though it is not always described as a separate method. Glaser and Strauss (1967) stress the significance of comparative analysis, arguing that it is a general method just like the experimental and statistical methods, which also use the logic of comparison.

The importance of comparison in rational reasoning is not restricted to research, since comparison is an activity of everyday life as well. Comparing experiences, knowledge, places or a person with others already known is one way to construct categories and typologies. For instance, comparison is one of the ways in which 'special needs' are constructed and justified. One child is compared with a number of others and he/she is categorised to fit in one or other category. Then in order to compare, it is necessary to have two or more of the 'same kind' or 'similar' (in this case children). However this is not the only condition required for comparison; comparison also involves a set of underlying criteria, values or assumptions. In the example of 'special needs' the result of the comparison may differ according to who makes the comparisons, what set of criteria are being used and for what reasons the comparison is made. In any case, the comparison

defines the boundaries of what is 'normal' and what is 'special need' (Quick, 1981).

Thus, comparisons can be seen as embedded in knowledge production. However, although any research is to some extent comparative, not all research in education can be included in the field of comparative education.

Defining a study as 'comparative'

A number of criteria can be used to define a study as comparative. One criterion is *the minimal degree of explicit comparison* that is necessary for a study to be described as comparative in comparative education. For Cowen (1996) this criterion is fulfilled when an understanding of the relationship between at least two societies and their educational systems is established. In Halls' (1990) typology of research in Comparative and International Education two categories are identified; intra-educational and intra-cultural analysis of two or more countries, and education abroad which is "the study of aspects of an educational system or systems other than one's own" (p. 24).

The 'education abroad' type of study complicates the demarcation of this criterion because in this type of study the comparison is not necessarily explicit, since the study is only about one educational system. In this case, the researcher, being an 'outsider' to the system under research and bringing experience and knowledge of his/her own system, constitutes the comparative dimension of the study.

In a similar vein, Kohn (1987) distinguishes between 'explicitly cross-national studies' and 'implicitly cross-national studies'. In the former, data from two or more countries are compared and can be separated into four types according to whether the nation is the 'object', 'context' or 'unit of analysis' of the study, or whether the study is 'trans-national' (Kohn 1987; 1989).

In the latter, the 'implicitly cross-national studies',

...the investigators interpret their findings by contrasting what they learn about the country they actually study with what is known or is believed to be true about some other country or countries.

(Kohn, 1987, p. 714)

The implicitly cross-national studies or education abroad studies can be seen as a continuation of the 'pre-scientific' tradition of comparisons between countries based mainly on descriptive accounts (Brickman, 1988; Holmes, 1981).

From these definitions the centrality of the concept of '*difference*' in comparative education becomes apparent: different societies, countries, educational systems or aspects of them, etc., are necessary for a comparative study. Underneath the concept of 'difference' lies the more fundamental concept of '*similarity*' which allows the 'difference' to become 'meaningful', in order to lead to comparison. Without the fundamental concept of similarity, the notion that 'things' (e.g. societies, countries, educational systems) are primarily of the same kind, the comparison has no 'purpose'; it cannot provide evidence either of the fundamental similarities or of the consequent differences. Thus 'things' –units of comparison- are seen as simultaneously similar and different.

Kohn (1987) does not perceive 'similarities' and 'differences' as having the same research nature, or the same theoretical and methodological implications in a research study. On the one hand, according to Kohn "finding similarities greatly extends the scope of sociological knowledge" and similarities "lend themselves readily to sociological interpretation" (p. 716). On the other hand, the interpretation of cross-national differences is a more difficult and less straightforward process. Kohn argues that the task of finding out 'lawful explanations' of

...cross-national differences require more explicit consideration of historical, cultural, and political-economic particularities than does the lawful explanation of cross-national similarities.

(Kohn, 1987, p. 717)

Finally, Noah (1973) questions the validity of this criterion, arguing that not all comparative studies use data from more than one country and that not all 'inter-, cross-, or multi-national studies' are necessarily comparative, since they may not use a 'comparative method'. Hence, what is important is not the kind of units that are selected, but rather the way that data are collected, analysed and theorised.

A second criterion then can be *the use of a comparative methodology derived from a comparative theory*. Although this criterion appears more fundamental than the first one, it is much more difficult to apply. Firstly, there is no consensus amongst writers about what is an appropriate comparative theory or method. This is not surprising if one takes into account the different theoretical perspectives that are represented in the field of comparative education (see Paulston, 1997; Altbach and Kelly, 1986; Edwards et al., 1973). Furthermore, it is not even clear

if a *distinct* method of comparative education exists. Kohn (1987) argues that cross-national research is similar to any comparative research, with the difference that “a much broader range of comparisons can be made” (p. 725). In addition, Altbach (1991) argues that due to the multi-disciplinary character of comparative education “a formal methodology for such a hybrid field is impossible” (p. 491).

A third criterion is whether a study has one or more *aims in common* with comparative education. The aims of a study cannot be seen independently from the theory and method of the study. The aims of a study influence (and are influenced by) the theoretical orientation and the methodology of the study.

Halls (1990) describes three aims of comparative education

1. To provide an educational morphology, i.e. a global description of the forms of education [...]
2. To determine the relations and interactions between the different aspects or factors in education, and between education and society [...]
3. To distinguish the fundamental conditions of educational change and persistence and relate these to more ultimate philosophical laws. (This millenarian task is one that some comparative educationalists, like most historians, believe is beyond accomplishment).

(Halls, 1990, p. 22)

Crossley and Broadfoot (1992) define four purposes of comparative education: studying other systems helps in the understanding of one's own system; understanding of similarities/differences, and processes and outcomes help the planning of policy; understanding of the relationship between educational systems and other sectors of society; and comparative education as a means to promote co-operation between nations. From these four purposes they identify two categories of studies; those examining the relationships between education and society and those researching ‘variations in pedagogic practice’.

Up to this point three criteria for placing a study in the field of comparative education have been presented: the aims and purposes of comparative education, the theory/methods of comparison and the units of comparison. Instead of trying to discuss the current state of comparative education by following the traditional approach of reviewing the evolution of the field in a linear approach, the changes in the relationship between these three criteria constitutes the focus of the discussion⁴.

The mapping projects of Comparative Education

The aims and purposes of comparative education and consequently its theoretical and methodological orientation are connected to the origins of the field. Cowen (1996) regards comparative education as a field which “is itself part of the modernity project” (p. 151) (see also Coulby and Jones, 1996; Rust, 1991)⁵. The initial aims of comparative education were based upon the belief that it is feasible to examine and categorise the ‘morphological’ characteristics of educational systems and their components in order to channel efforts of policy-making in ‘ameliorating’ these systems and the contexts in which they function.

The aim of this project can be described using the metaphor of a ‘map’. The ultimate aim, the Holy Grail so to speak, of comparative education was the construction of a ‘map’, which could include every single item of information

⁴ For a discussion of the evolution of the field and alternative typologies see Cowen, 1996; Halls, 1990; Holmes, 1981; Postlethwaite, 1988.

⁵ For a historical overview of comparative approaches before the establishment of the comparative education field in the 19th century, see Kalogiannaki, 1998.

about all the educational systems of the world. This map would not only give a 'real' and 'objective' picture of the international state of education and its relationship within and across nations, but it would be possible to be universally understood, insofar as it would have been produced in the international, generally accepted language of science. This map would be able to describe the educational systems, explain their 'similarities and differences' and their developments and give directions for educational action, all at the same time⁶ (Holmes, 1981)

One assumption underlying this project is that its 'scientific nature'—the objective and truthful picture of education—could be translated into a consensus about what education ideally should be like, and hence to rationalised decisions about educational policy.

This project was never to be realised partly because the only way to construct such a complete and accurate map both in range (international) and in content (information) is by creating a map on a one-to-one scale. This however is not possible. In the same way that any geographical map is a reduction of space and detail of the physical environment that it represents, any 'social map' is also subjected to reduction and selection. In addition this project was based on the positivist assumption that one and only one reality exists and is open to exploration through scientific methods. Watson (1998) points out the degree of difficulty of constructing "an all-embracing comparative 'map' however hard one tries, because the way we map or perceive the topic comes from our own background and disciplines" (p. 24). A further difficulty is the accommodation of the 'temporal' dimension in such a map. The historical divisions, the cutting

⁶ For a similar discussion in Sociology, see Therborn, 2000, and for Comparative Public Policy see Heidenheimer et al., 1990.

points defining both educational change and changes in the general context are always open to challenge (Phillips, 1994).

However, this project was not abandoned but rather transformed. Noah (1988) notes that “a fundamental task of comparative education is to collect, classify, and array data about the educational efforts of the nations of the world” (p. 10). Therefore, the aim of collecting as much diverse information as possible about educational systems remains. What has changed is the *language* used. The language of description used in travellers’ tales and the general ‘qualitative’ tradition of comparative education -which Halls (1990) calls the ‘literary’ approach to comparative studies- was abandoned in favour of a *quantitative language* (see also Ragin, 1989).

This change does not simply mean that quantitative methodologies and methods are used for the collection, analysis and presentation of information/data. Again using the metaphor of a map, it can be argued that the change of language has been so extensive that not only does the map produced use quantitative language, but also the ‘social environment’, which is represented in the map, is viewed in quantitative or *numeric* terms. Educational systems, schools, students, teachers, textbooks, classrooms, subjects, teaching hours, teacher-pupil interaction, teaching methods as well as social class, religion, economy, society and so on are seen as ‘numbers’, data and ‘packages of variables’ (Peters, 1998, p. 7) able to be codified, categorised and analysed.

Noah (1988) describes this in the following way. ‘The primary goal’ of comparative education is to produce “the most complete description possible of

other educational systems, and the most telling comparison of one system with another” (p.12), and to “enrich as much as possible the connotational content of country names” (p. 12). The transformed aim of comparative education according to Noah’s model⁷ is to formulate ‘general *law-like*, cross-national statements’, using the following principles:

- (a) To place primacy on the careful identification, validation, and measurement of variables;
- (b) To show the relationships among those variables within each country;
- (c) To compare cross nationally the direction, size, and confidence levels of statistics measuring these relationships; and
- (d) To rely upon such factors as “national character”, or “historical background”, for explanation and generalisation only when the introduction of additional variables yields no gain in explanatory power.

(Noah, 1988 p. 12)

The ‘scientific, quantitative language’ of comparative education is more orderly, easier to manage, and more self-contained than the ‘real’ phenomena and concepts that it examines. It makes the distinctive characteristics of these phenomena and concepts ‘obsolete’ as long as they do not fit in the ‘map’. In this model ‘qualitative’ information is seen as the last resort, to be avoided whenever possible so as not to ‘contaminate’ the ‘quantitative language’. As Watson (1998) notes “schools and schooling were seen as ‘black boxes’” (p. 12).

This project demands specific types of research communities. Its aims cannot be realised within the traditional type of research in social sciences where a sole researcher or a small group of researchers are responsible for the data collection and analysis. A large amount of relevant comparative data has been collected by

⁷ This model was developed by Noah and Eckstein.

the multilateral organisations that emerged after the Second World War. The problematic nature of this is that these organisations have specific interests and goals, which are reflected in the type of data collected and the questions asked (Crossley, 2000; Mundy, 1998). Heyneman (1993) gives an interesting illustration of this. He describes the reactions of the staff of the *Center for Education Research and Innovation* (CERI) when, after the publication of *A Nation at Risk*, the U.S. delegate pressed for a project to collect 'input-outcome' statistical information:

The reaction among the staff of CERI was one of shock, and deep suspicion. Those whom I interviewed believed it was unprofessional to try and quantify such indicators, that it would oversimplify and misrepresent OECD educational systems, and that it would be rejected by the 24 member states whose common interests they were charged to serve.

(Heyneman, 1993, p. 375)

Potential internal conflict is not recognised in the publications of these organisations. What is presented makes a 'neat', well-put together story in which problems are limited to the methodological chapter, especially in reference to the validity and comparability of available data.

This approach to comparative education reduces educational processes and phenomena and the role of social agents to numerical representations. Furthermore, its outcomes, (mainly in the context of policy-making promoted by multilateral organisations, but also at national and academic levels) have an important and significant effect on these processes, phenomena and social agents. The 'map' of this project not only reduces the 'value' of social agents to a numeric figure but also has the power to transform the social environment in which these 'numeric values' live and function. Additionally, the identities of

social agents are influenced by their 'value' in the 'map'. Media representations and 'education in crisis' outbreaks are sometimes based upon data of for example the 'performance' of teachers in different countries (McLean, 1992) even in cases where national and local data on performance is not available to the teachers themselves (See Farrell, 1997 for different models of educational planning).

Changing the language of the 'map' from a descriptive/inclusive language using a range of information/'signs' (words, numbers, meanings, and contradictions between concepts and phenomena) to a descriptive/exclusive language using mainly numbers, created a conflict in the field. This conflict started as a criticism of the dominance of the 'exclusive' project. Kelly and Altbach (1988) argue that four different groups challenged the exclusive project. These groups are:

- (a) Those that question the nation-state or national characteristics as the major parameter defining comparative study;
- (b) Those that question the use of input-output models and exclusive reliance on quantification in the conduct of comparative research;
- (c) Those that challenge structural functionalism as the major theoretical premise underpinning scholarship; and
- (d) Those that direct attention to new subjects of inquiry.

(Kelly and Altbach, 1988, pp. 13-14)

As an outcome of this criticism, the primary project of comparative education re-emerged with the emphasis this time on its 'inclusive' language. The new project no longer aims to construct a total 'map' based on scientific consensus, but rather to explore the polyphony in the field, the alternative readings of representation and meaning, and the introduction of new perspectives and 'voices'. As McLean (1992) proposes, "comparison is needed which fortifies meaning and which saves indigenous, organic goals from introversion and xenophobia" (p. 1).

This new project is not defined around the feasibility of 'accumulating' knowledge, in order to construct the 'map' like a jigsaw puzzle. It is based upon the juxtaposition of produced knowledge even when the different aspects of this knowledge may contradict each other. This project does not refute quantitative methodologies and methods. It views them as another method of approaching comparative research questions. Yet, a strictly quantitative language, as it has been described above, is strongly criticised.

However, in order to pursue this project, which is loosely connected to a central 'aim', it was necessary to keep something intact of the primary project. What is kept is the 'layout' of the social world and of the 'map'. The social world is still seen with its fundamental 'similarities' and units of comparison (nations, societies, educational systems and so on) although new units of comparisons have been introduced, specifically the 'area' and 'rims' approaches and 'world system analysis' (Clayton, 1998; see also Bray and Thomas, 1995, for a discussion of multilevel analysis).

Despite the fact that this new 'inclusive' project may seem 'weak' because it does not presuppose the 'positivist' aim of a total, accurate map (and this is an often expressed criticism), this 'weakness' it is also its 'strength'. It allows for a greater flexibility in its purposes, theories and methodologies and research questions.

The new pluralist comparative education project affected also the 'stronger' 'exclusive' project, which adapted to new perspectives in the field. However, change is not simply incorporated in the project as a new, equal component of it. It is 'transformed' in order to fit the framework of the project. When possible the

new element is expressed in its 'numeric value', in the quantitative language of the project. This happens especially in the case of new topics of study (Heyneman, 1993). When this is not possible, the new element is 'subordinated' to the quantitative language of the project. For instance, 'qualitative methods' may be used as providing 'examples' of what has been demonstrated with the main quantitative language (see for example, OECD, 1995).

Up to this point the 'projects' of comparative education have been presented, and it has been argued that currently in the field two projects can be distinguished. One is the 'exclusive' project based on the use of a 'quantitative' language and the other is the 'inclusive' project based upon the assumption that the selection of a single 'language' is neither satisfactory nor desirable. Both projects have similar aims, to describe and explain educational phenomena and to promote change and 'good' policy-making whenever is possible. Both projects use the same or similar units of comparison. The types of studies undertaken in both projects are similar (but not the same) as far as the number of units, the interests and topics researched are concerned.

The 'limitations' and 'problems' of Comparative Education

The two comparative education projects co-exist in an antagonistic relationship in the field of comparative education. One way that this co-existence is described, is as 'necessary', as supporting the same goal of promoting the understanding of international education (Crossley and Broadfoot, 1992). Another way the two projects are perceived is as being 'in conflict' (Heyneman, 1993). In this case,

each project is seen as undermining the promotion of the aims of comparative education by focusing its efforts on the 'wrong' direction.

The middle ground is to see the two projects as being defined in relation to and at the same time in opposition to each other, and sometimes as overlapping. This becomes clear in accounts of the limitations and problems of comparative education where the two projects are found both in 'synthesis' and in 'opposition'. In the following section two major issues that are considered as problems or limitations in the comparative education literature are discussed. These are the issues of the units of comparison, and of information/data used in comparisons⁸.

Units of comparison

Regardless of what units are selected for comparisons (e.g. the world, areas, nations, areas within countries, schools, and social actors), the way that they are seen in a study does not correspond completely to their real expressions. They are defined according to the aims of each study. For example, the ways that 'England' and 'Greece' are defined as the contexts/units of this study may differ from how the same units are defined in other studies.

Firstly, units can be seen as 'specific', 'representative', or 'abstract'. In the case that they are used as '*specific*', their unique character is taken into account throughout the research process and in any generalisations made (McLean, 1995).

⁸ Other issues that are considered as 'problems' are the concept of educational 'borrowing' (see Crossley, 2000; Halpin and Troyna, 1995; Phillips, 1989), and the role/influence of 'sponsorship' (Crossley and Broadfoot, 1992).

When they are used as *'representative'*, they are used as 'models' representing a number of other units having similar characteristics (Poppleton, 1992). Therefore, the generalisations made can be, more or less, applied in the rest of the units that they are representing. Finally, in the case that units are considered as *'abstract'* the focus is more on their fundamental 'similarities' than on their specific characteristics. To put it in a crude way, teachers are teachers, schools are schools and educational systems are educational systems no matter how great their differences are. Both projects use all three types, although the use of 'units as abstract' is much more common in the quantitative project.

Furthermore, units can be explored in their *'totality'* or *'partiality'*. In the first case, all the elements of the units are taken into account. In the second case, a specific element is emphasised or examined in relation to the research topic and research questions (Poppleton et al., 1987). Again both types can be found in the two projects, although the meaning and the methodological implications of 'totality' and 'partiality' may differ.

Finally, units can be perceived as 'historical', 'transitional', 'current', or 'abstract/static'. When units are seen as *'historical'*, their change/evolution over time is taken into account (Phillips, 1994; Simon, 1989). On the other hand when they are seen as *'transitional'*, it is assumed that a change has occurred or is taking place that has affected the units, e.g. an educational reform which has changed the content and pedagogy of the curriculum (Fowler, 1994; Poppleton et al. 1994; Osborn and Broadfoot, 1992).

In the case that units are seen as '*current*', they are examined in the present, in an arbitrarily selected moment of time. Finally, '*abstract/static*' units are explored according to their fundamental characteristics that are unaffected by change.

Phillips (1989) argues that, "comparative research in education should take into account the historical, political, social and cultural setting of particular systems and aspects of them" (p. 269) (see also Foley, 1991). When this statement is compared with the four stages of Noah's model, it becomes clear that historical units cannot easily find a place in Noah's model. In the 'exclusive' project units are mainly used as 'current'. When an historical aspect is added, it is limited to time-scale data, i.e. data about the same variable at different time periods.

Moreover, in all the above categories it is important to see how units are examined in relation/comparison to each other. This moves beyond the fundamental 'similarities' and 'differences' -the descriptive part of comparative education- to the 'explanation/evaluation' part⁹. This is the level of comparative education that has been criticised the most, because it makes apparent the ideological assumptions underlining comparisons.

Ideally it is assumed that units exist in a state of '*neutrality*', i.e. that units are well-defined, autonomous, and independent. In this way, units are 'at the same starting level' before comparisons are made. However, there are two problems with 'neutrality'. On the one hand, 'units' are never completely self-contained, and the relationships between 'units' are not always 'neutral'. Furthermore, even

⁹ It is important to note that the 'descriptive' part of comparative education is also evaluative in the sense that all decisions about how to define the units of a study are based on values and theoretical assumptions.

in the case that one accepts the 'neutrality' of units, the hypotheses, theories and methods used during comparisons are not 'neutral'.

Very close to this is the perception of units as 'equivalent'. Equivalence means that units are not only at the same level but can also be put 'side by side'. For example, countries are seen as 'equivalent' despite their differences for instance, in size and population.

Alternatively, the units can be seen in '*opposition*', as being positioned at the two ends of a clear-cut dichotomy. A classic example is the polarisation between centralised and decentralised educational systems (see Sharpe et al., 1997; Archer, 1989). They can also be perceived as '*not there yet*', as not having reached the standards of more '*advanced*' units. The units can be seen also as '*others*' (Welch, 1993), as having characteristics that do not exist (because they are not necessary/functional) in '*us*'. Both the comparison of units as 'not there yet' and 'others' are a result of 'neo-colonialism' (Altbach, 1995; Rust, 1992), cultural imperialism (Crossley and Broadfoot, 1992) and ethnocentric bias (Holmes, 1980) in comparative education.

It would be simplistic to suggest that any of the comparative education projects avoids these pitfalls. As anthropological research has shown, ethnography can be ethnocentric and imperialist (for a anthropological perspective in comparative education, see Hoffman, 1999).

Information and data

The quantity, quality, access of information and data, as well as the time and expenses needed to collect this information and data are central in the discussion of the 'problems' of comparative education. These problems affect the two projects differently.

The exclusive/quantitative comparative education project concentrates more on the problem of the availability of statistical data, since it relies heavily on this type of data. The 'problem' in this project is not only the quantity of the data (which is never sufficient) but also the quality; data are 'unreliable' and 'narrow' (Heyneman, 1993). Usually, this 'problem' involves the following: the data collected by different Governments and organisations are not equivalent (the data do not correspond to the same variables and data for all variables are not provided); the collection process is slow and not sophisticated enough; and data are constructed in a specific way in order to meet specific political ends¹⁰. For researchers using 'secondary data', which have been already analysed, the influence of the first analysis is added to this list (Pijl and Meijer, 1991, for special/inclusive education and Daunt, 1992, for a critique of this study).

Researchers who use qualitative methods for collecting data have similar problems to those above as well as some additional ones. The quantity of information/data is never sufficient to justify extensive generalisations. The quality of information, on the other hand, can provide 'insight' (of the kind that

¹⁰ Gartner and Lipsky (1987) give an example of this in special education, observing that data about 'decertification' –children returning to regular education from special education- were not collected by the U.S. Department of Education.

research in the quantitative project may not be able to provide) but again within limits (Masemann, 1986). Getting access is a problem to which is added the additional issue of spending long periods in the field. When the research project is undertaken by a group of researchers from different countries difficulties of 'communication' and the influence of different theoretical approaches also affect the study (Whitty et al, 1998; Van Daele, 1992).

Furthermore, the issue of language is fundamental in both projects. Comparative education is a mainly English-speaking field (see Bynner and Chisholm, 1998 for a discussion of the balance between English and French as the dominant languages in comparative education). The translation of information and data from the original language to English is to some extent perceived as a 'natural' part of the 'scientific'/comparative process. English, and the meanings that concepts and phenomena have in English, become normative in constructing the 'scientific meanings' of the field. This issue is not very often addressed. The assumption that data/information do not 'fit' the 'scientific' concepts/variables, which are linguistically and culturally defined in English can be reversed by arguing that the concepts/variables are insufficiently flexible to fit the information/data.

An alternative reading of the above two issues is that what constitutes the *epistemological* 'limitations' of the two projects of comparative education, are 'translated' as practical problems about information and data. To put it simply, there is the belief that when we will be able to collect all the information and data

needed in an appropriate form, we will be also able to construct the total 'map' of comparative education. Raivola (1986) argues that the assumption that "objective data for comparison are somewhere in existence just waiting to be gathered"

...evidently confuses concept with empirical phenomena that are directly observable and with variables derived from them. But concepts are generalizations and abstractions from what is empirically observed, and these have meaning only in the context of a theory.

(Raivola, 1986, p. 269)

Thus, the 'problem' is not the 'inadequate' nature of information and data –and the complexities of the social world of which these data and information come from- but rather the 'limitations' of the epistemological frameworks, of the aims and purposes of the comparative education projects. Epstein (1986) argues that:

However much we may have improved our application of technological and quantitative tools to the analysis of educational problems, we have progressed nary a step in becoming disinterested, ideologically unbiased observers of school-society relations.

(Epstein, 1986, p. 235)

He continues that instead of avoiding acknowledging the ideology informing the epistemologies of the field, it is preferable to incorporate it in the discourse of the field. The theories of comparative education affect both what questions are asked (and what are not), and how they are asked (Welch, 1998a; 1991).

Conclusion

This chapter attempted to map the field of comparative education. A typology of the projects of comparative education was discussed, based upon the aims and the 'languages' they use to realise their aims. The starting premise for this typology

is that comparative education belongs to the general project of modernity. From this premise a central assumption was put forward, that for comparative education to achieve its aims in the modernity project it was not possible to question the epistemological assumptions of modernity. As Cowen (2000) argues:

The aspiration to be a certain sort of science has haunted comparative education over a period of about 170 years, and in one decade in particular came close to destroying it.

(Cowen, 2000, p. 334)

The 'failure' of realising its aims, and the current challenge of the modernity project (Rust, 1991) leaves the field of comparative education disorientated once more. However, it is not clear whether comparative education will embark on a new project (Welch, 1998b). As it seems now, it is possible that comparative education will continue to follow different projects and perspectives, each of them claiming that it can better achieve the aims of comparative education (see for example Cummings, 1999). At the same time, the increase of perspectives, topics and 'voices' will continue to result in even more distance from the 'ideal' aims of each project. This alternative of further fragmentation of the field is, to some extent, consistent with 'post-modernity'. However, as Welch and Masemann (1997) argue "the critical task of outlining a more inclusive comparative methodology lies still undone" (p. 398).

Chapter Four

Mapping Inclusion: An alternative Comparative Framework

Introduction: Special and Inclusive Comparative Education

The first section of this chapter is an overview of comparative research in special/inclusive education. This body of literature is located more in the field of special/inclusive education than in the field of comparative education. This means that researchers who have as their main interest special/inclusive education, and are using general theories of special/inclusive education conduct the majority of the studies. The second part of this chapter presents an alternative comparative framework bringing together inclusion and comparative education.

‘Special education’ is a problematic concept. It is not a self-explanatory one, and needs careful examination and definition. One way to define special education is based on the general/special education dichotomy. According to this, special education is any educational provision different from the ‘standard’, general provision. Such a definition does not explain the relationship between general and special education nor the reasons leading to this dichotomy.

As a result of this dichotomy general and special education historically have been perceived as separate components of the educational system, and separate school populations, educational methods, curricula, professionals, and topics of research have been developed (Sebba and Ainscow, 1996).

Special education, however, has undergone a number of changes, which make this dichotomy less clear than it initially appears. Under the influence of the concepts of integration and inclusion the boundaries between special and general education have changed. With integration special education became part of general education (for an early critique of integration policy and its implementation see, Swann, 1985) and with inclusion -or at least with some definitions of inclusion- the interest moved from the 'children with special needs' alone to 'all children' and the curriculum and organisation of schools (Mittler, 1995). Clark et al. (1998) acknowledge this difficulty in defining special education. They acknowledge that special and inclusive education and their respective terminologies can be antagonistic at times.

For the purposes of this section, a comparative study on special/inclusive education is defined as any study that (a) acknowledges that educational systems do not provide one 'type' of education only, and (b) examines different 'types' of education in an explicitly or implicitly comparative way¹¹ in different countries.

Most research of special/inclusive education is implicitly comparative, since in the general/special education dichotomy 'special' education is defined by the fact that it is not 'general education'. On the other hand, 'general' education is not

¹¹ Two additional categories of 'comparative' studies in special education can be distinguished. One is concerned with the comparison of different group of children (e.g. children with special needs vs. 'normal' children) and the other with the comparison of different types of provision (e.g. segregated vs. integrated/inclusive) provision (Hegarty, 1993).

usually defined in relation to 'special' education, but in relation to the presumption that it is the 'norm'. Thus, although it can be argued that in research in the field of special education it is very difficult to avoid referring to general education, the same does not apply for research in general education, and comparative education is an example of that.

Special education is under-represented in comparative education and a glance at the leading journals of comparative education can very easily prove this point. A large part of 'mainstream' comparative education takes for granted the general character of 'general' education; references to state (and private) education mean state (and private) *general* education.

However, in many educational systems, 'general' education also incorporates forms of 'special' education. In addition, the relation between 'general' and 'special' education in different educational systems is a two-ways one, in which specific characteristics of 'general' education may lead to specific forms of special education, and vice versa. Finally, for a part of the school population the fact that they are educated in 'general' or in 'special' education may not seem so obvious and stable. Students are moved between types of education during their schooling, or they experience simultaneously different types of education.

In the last ten years or so the number of publications in the special/inclusive education field that can be described as comparative has increased. One possible reason for this may be that issues in special education are more and more part of a cross-national discourse. The three criteria identified in the previous chapter -

degree of explicit comparison, comparative theory and methods, and aims and purposes- are used to review this literature.

Degree of explicit comparison

The first criterion is concerned with *the degree of explicit comparison*. In the literature of special education two main types of comparative presentation exist. The first one includes publications that compare in an explicit way the educational systems of two or more countries. In this type of comparison the same or different writers may have produced reports from each country, and the same or different writer(s) may have done the comparative analysis. In all cases similar aspects of the educational systems are presented and analysed (for comparisons between more than two countries see Pijl and Dyson, 1998; Loxley and Thomas, 1997; OECD, 1995; Daniels and Hogg, 1992; Pijl and Meijer, 1991; Fulcher, 1989, and for comparisons between two countries see McLaughlin and Rouse, 2000; Norwich, 1994; Rouse and Florian, 1996; Carrier, 1984). This category can also include studies of the education abroad type (see O'Hanlon, 1995a; Potts, 1995. See also Stone, 1999 and Penn, 1999 for disability in the majority world).

The second category includes publications where country cases are presented with editorial comments. Usually the editor(s) give a number of guidelines to the writers but they are free to explore as many of these guidelines as they want. Thus the final reports may not provide exactly the same material (see F.

Armstrong and Barton, 1999b; Daniels and Garner, 1999; Booth and Ainscow, 1998; O'Hanlon, 1993,1995b). For instance, Ballard (1999) notes that

We agreed that people should interpret the research task in their own way. We expected that this might result in a diverse range of studies, given the open-ended option regarding who might be involved as participants and that people held different views on the kind of research method that should be applied.

(Ballard, 1999, p. 3)

What is interesting in this distinction is that the second category cannot easily find a place in Hall's typology, despite the fact that it is a common practice in many fields of education. For instance, since the early 1980s many edited books in special education have included chapters written by authors from different countries about their educational systems as well as explicitly comparative ones.

Barton and Tomlinson (1984), in one of these books argue that

[...] it is necessary to analyse changes and developments in special education in some kind of comparative perspective to avoid assuming that developments in one country are the 'norm' and to prevent social analyses of special education becoming nationalist or ethnocentric.

(Barton and Tomlinson, 1984, p. 5)

Recent publications of this type may be seen as an attempt to formalise this comparative aspect.

This category can also be seen as the opposite of the education abroad type of research. The writers examine their educational system in order to present it to an audience, who may not have a first-hand experience of it. In this case, the readers constitute one comparative dimension and they are called to make their own comparisons and interpretations of the material.

Comparative theory and methodology

The second criterion is concerned with *comparative theory and methodology*.

What is obvious from the overview of the literature is that in general there is no exchange of theories between comparative education and special/inclusive comparative research. Comparative special/inclusive research is a response to the debates and interests of the special/inclusive education field.

In order to explore the theories and methodologies used in the literature three criteria may be useful:

- The way that the selection of the countries under study is made,
- The comparative methodology and methods used in the collection of the data, and
- The theory used in the analysis

The selection of countries is usually based on some common characteristics and two tendencies can be identified. In the first one, countries are selected according to a non-educational characteristic, such as being in Europe (Johnstone and Warwick, 1999; O'Hanlon, 1993, 1995b) or an OECD member (OECD, 1999; 1995). In the second one, the writers have a number of criteria (educational and non-educational) for selecting countries. For instance, Meijer and Pijl (1994) mention four criteria: existing integration policy; available information; different models of integration and practices; and similar socio-economic and cultural dimensions.

Despite the variation in the selection of countries, there is an over-representation of Western countries. English-speaking countries, Scandinavian and European countries are the main- and overlapping- groups that appear in the literature. This

raises a number of questions about the assumptions around, for instance, inclusion and where it can be found to happen.

An alternative approach to selection of countries is outlined by Barton and Armstrong (1999) who as editors use a 'cross-cultural approach' which does not look for 'sameness' and 'opposites' but for 'connections and differences between and within societies' (p. 3). As far as the selection of countries is concerned, they argue

In a sense it would be wrong to say that any countries are 'represented' in this book. Indeed, there is no attempt to represent countries or areas. The selections made concern our choice of contributors, rather than a search for material on particular countries deemed to 'represent' the 'different parts of the world'.

(Barton and Armstrong, 1999, p. 5)

As far as the second criterion of comparative methodology is concerned, Poppleton (1992) argues that in a comparative study conceptual, sampling and methodological equivalence are important. This means that the same concepts are examined within the context of each country; information is collected from equivalent institutions, people and documents; and the same methods are used for the collection of the data. The concept of 'equivalence' is challenged throughout this text. However, it is used to discuss the literature in order to see whether it is considered important and how it is used.

These three aspects of equivalence are not very often found in the literature. To some extent this is due to the country-report method, which does not always require the writers to use a common methodology. Although this flexibility can produce rich information, it can be problematic when conceptual equivalence is

taken for granted. This can happen when the theoretical positions of the writers are not stated, a common understanding of the language is not established, and official documents are used as data. In the last case, official documents are very often treated uncritically and are perceived as meaning the same things across countries. A possible pitfall of this is, as Booth and Ainscow (1998) argue, “What is called a national perspective is often an official view” (p. 4).

Furthermore, most of the studies use a combination of quantitative and qualitative data such as (official) quantified data, policy documents, existing literature, interviews and observations in schools. Many studies however –especially of the country-report type- use only secondary analysis and information such as official/legislation documents and statistical data.

Finally, different theoretical approaches are found in the literature. Fulcher (1989) uses a model of policy, which defines it as struggle at all levels of the educational arena. This model is used in two ways. First, the model is the basis for examining different educational practices, and then the evidence produced from this process is used to verify the validity of the model, since “this is how social theories are both used to make sense of everyday life and are tested” (Fulcher, 1989, p. 260).

Meijer et al. (1994) argue that theoretical equivalence is necessary in a comparative analysis and therefore a theory should be applicable to all countries examined. Their theory regards teachers’ behaviour, and parents’ and students’ attitudes as the ultimate factor in successful integration. This factor is connected with a number of other related factors; for instance, teachers’ behaviour is formed according to the resources available, which in turn are affected by legislation

policy, organisation of education and so on. However, the writers state that the country-reports do not include all of these factors and that policy, legislation, organisation of (special) education provision, and teachers' attitudes are the main topics covered. To a point the country-reports have the opposite structure from the theoretical model, starting from the national level and moving down towards the classroom level.

In Booth and Ainscow (1998) the background theory is used in many ways. Their theory, which is based on the relationship between inclusion and exclusion taking into consideration the cultural and political context, provides the editorial guidelines in sixteen points under three themes: definitions, responses to diversity, and recognising differences of perspectives. This theory is used by the authors to write their national accounts and then by the editors to produce a critical commentary of each account, and a comparative analysis of both the national practices and the accounts. This last use of the theory gives an insight into the difficulty in achieving conceptual equivalence. In relation, for example, to the inclusion and exclusion link, the editors note that none of the other contributors refer directly to it and that despite their attempt to perceive the cases as 'a school in a local region in a country', most of the accounts focus on the national context.

Aims of the studies

The final criterion is concerned with *the aims of the studies*. Most of the aims of comparative education are evident in these studies. More 'descriptive' studies

attempt to highlight the similarities and differences between countries and promote 'good practice' (see O'Hanlon, 1993, 1995b; OECD, 1995). On the other hand, more 'explanatory' studies try to research those factors affecting education within and across countries (Meijer et al, 1994; Pijl et al, 1997) and to examine the relationship between discourses and the contexts within which they exist (Fulcher, 1989; Booth and Ainscow, 1998).

The characteristics of Special/Inclusive Comparative Research

From the above a number of distinctive characteristics of comparative research in special/inclusive education can be extracted.

The first characteristic of the literature is the extent that the 'country-report' model is used. This model has implications for how comparative equivalence is defined, and how comparisons are made. The second characteristic is that theories of special education are usually used in the comparative analysis and sometimes the comparative dimension of these theories is not fully stated.

Trying to position this body of research within comparative education as a whole is not easy. It may seem obvious that this literature can be located in the 'inclusive project' of comparative education since it uses a variety of 'languages', theories, methods and approaches to select its units. However, there is a fundamental difference between comparative research in special/inclusive education and the 'inclusive project' of comparative education. The former does not constitute part of a 'comparative project'. Most authors acknowledge the importance of understanding special education/inclusion in different countries

and the 'lessons' that can be learn from policies and practices in different countries (Ainscow, 1999). This, however, is not 'translated' to a project of constructing a comparative map.

This literature in general does not attempt to construct general typologies, ideal models and comparative models of special/inclusive policies and practices, which can be applied in any country or a large number of countries. An exception is Fulcher's research, which provides both a theory of integration/policy-making and a comparative framework (see also Booth, 1999, that explores comparative research in the 'North' and 'South' and how they can learn from each other). The literature focuses mainly on the tradition of research and theories of special/inclusive education, and it operates in the 'fragmentation' of this field and not that of comparative education.

The question is whether it is 'useful' to connect the literature of the two fields. To some extent this is inevitable. As long as special education continues to 'grow' within general education, comparative education will soon reposition it from the periphery to the centre of its interests; especially in the cases that 'special' education is understood as a different kind of provision increasing consumers' 'choice' (Cowen, 1996).

On the other hand, comparative research in special/inclusive education may both contribute to and 'learn' from the field of comparative education. It can contribute to the comparative education debate since it is free of the 'legacy' of the comparative education projects. On the other hand, it can learn from the epistemological awareness of comparative education as far as the process of

comparison is concerned. Comparative research in special/inclusive education through the exploration of the concept and meaning of comparisons may be able to uncover the “panoply of unspoken assumptions, covert cues and responses” that influences the definition of ‘special needs’ (Carrier, 1990, p. 216).

A comparative framework for researching inclusion

We inherit a map of education drawn up by our predecessors. If we wish to explore new ways of understanding special education then we have to jettison the language that ties us to old habits of thought.

(Booth, 1988, p. 97)

In this section a framework is presented that explores the theoretical understanding of inclusion (and exclusion) discussed in Chapter Two, using a ‘comparative language’, which locates the study both in the field of comparative education and that of special/inclusive education.

This attempt to unwrap the complexities of inclusion uses the approach of social cartography. Liebman and Paulston (1994), writing in the field of comparative education, describe the aim of social cartography as the construction of ‘social cartography models’ in a similar way that geographic maps are created (without the restriction of necessarily using Cartesian Co-ordinates) and thus reproducing a ‘total space to a much smaller scale’ (p. 238) (see also Watson, 1998; Paulston, 1997; Paulston and Liebman, 1994).

These maps represent social space/reality as it is conceptualised by the cartographer and therefore

Social cartographers do not argue validity because they understand that others are encouraged to question the spatial relationships of mapped

social realities; social maps are not empirical mathematically correct representations. The social world cannot be measured, but it can be viewed, reported and compared.

(Liebman and Paulston, 1994, p. 238)

Graphic/visual representations are a common practice in social sciences. Many figures included in texts using a different organisation of the paper/space from the positioning of words forming sentences may be characterised as belonging to some extent to this approach (see Paulston, 1997).

In the literature of special education and inclusion examples of visual representations can be found in Fulcher's (1989) graphic presentations of a political model of policy and educational arenas (Fulcher, 1989, figure 1: 'The political model of policy based in a theory of discourse', p. 4 and figure 2: 'Some examples of policy levels and arenas in the Victorian educational apparatus', p. 6). A further example is Corbett's (1997) deconstruction of the exclusion/inclusion continuum (Corbett, 1997, Figure 2: 'Contribution currency (market)', p. 62)¹².

In this chapter social cartography is used in a number of ways. Firstly inclusion/exclusion is examined by using geographical terms and spatial metaphors. Thus the 'abstract content' of the word is translated to slightly more concrete and specific dimensions by acquiring 'body' and 'space'. Secondly these

¹² A different example is the conditional matrix used in Grounded Theory as a visual/analytical aid which "enables the analyst to both distinguish and link levels of conditions and consequences" (Strauss and Corbin, 1990, p. 158). In this case the matrix can be used in any study in social sciences. It is mainly a graphic visualisation of the different levels in which a concept may operate (from international to the individuals' relationships) and researchers are responsible for locating the concept and finding the relationships amongst the different levels.

'spatial metaphors' are used to construct possible visual/analytical representations of inclusion and finally these representations are compared.

An advantage of this approach is that it may help to move away from a commonly used presentation of inclusion in which it is conceptualised either as a concept or as a phenomenon, which leads to the theory/practice dichotomy. Another advantage of this approach may be that it can give multiple representations of inclusion/exclusion, which can capture difference and therefore avoid concentrating only on ethnocentric and hegemonic representations. Finally, inclusion/exclusion can be seen in multiple ways without assuming that a concept or phenomenon cannot be simultaneously inclusive and exclusive. As Liebman and Paulston (1994) suggest

Social cartography rejects no narrative, whether it is a meta-narrative or that of a localised culture. Although meta-narratives are accepted and mapped, they are neither privileged nor accepted in their previous role of dominating other narratives. Thus, rather than legitimising meta-narratives in their modernist form, our mapping project introduces the concept of the mini-narrativisation of the meta-narrative.

(Liebman and Paulston, 1994, p. 237)

Inclusion as a new territory

A way to conceptualise inclusion is by comparing it to a new territory for which a complete map has not yet been produced. Inclusion, in this case, is still a 'new' term and its newness can be expressed both in temporal and spatial terms.

Inclusion has been introduced in the academic discourse of the last ten years or so (Fuchs and Fuchs, 1994; Stainback and Stainback, 1990). It gained international credibility in the UNESCO World Conference of Special Needs Education

(UNESCO, 1994). Its groundbreaking appearance in an official document in England was in the Green Paper *Excellence for All Children: Meeting Special Educational Needs* (DfEE, 1997), which “is an example of how the question of ‘inclusion’ has become mainstreamed” (F. Armstrong, 1999, p. 76). In addition to these milestones, the efforts of many schools in a number of countries to become ‘inclusive’ or ‘more inclusive’ (see for instance, Thomas et al., 1998; Gilber and Hart, 1992) and the continuous struggle of the Disability Movement for inclusion in all aspects of society can be added.

The above list, which focuses mainly on inclusion as a phenomenon, gives an indication of the many levels/locations in which inclusion operates. This list is constructed in a hierarchical manner with a ‘top-down’ presentation. More, importantly, the elements positioned at the end of it are less specific events than the ones at the top.

In an attempt to avoid presenting these ‘locations’ in a hierarchical way, it may be helpful to describe them as the *facets of a geometrical object*, of a polyhedron. In that way the ‘*body*’ of inclusion is a three-dimensional one, which can be seen from different angles giving different hierarchies. To make things more complicated there is not only one possible categorisation of the facets of the inclusion polyhedron.

For instance, a categorisation of *inclusion as a discourse* may refer to the academic, discipline/expertise, policy-making, practice, advocacy, and ‘in site’ discourses. The latter means the discourse of inclusion as it happens amongst individuals in places such as classrooms, schools, schoolyards, and neighbourhoods.

On the other hand, a categorisation of inclusion according to *location* may include such levels as the international, groups of countries (e.g. sharing common characteristics, i.e. belonging to specific organisations, existence of lack of inclusive policies and/or practices, language or culture and so on), national, local, institutional (e.g. schools), and relationships amongst individuals. Finally a categorisation of *inclusion as a notion* may comprise the following aspects: theoretical (philosophical), research (analytical), advocacy, policy, practice, pedagogical, and financial/resources.

None of these categorisations is complete and each component of them can be further analysed and sub-categories can be added. Combinations of these categorisations also are possible. Each of the polyhedrons can be inserted inside any of the others, or all of them to create a new stereo-metric object. In this way the interconnections and the common space (visible and hidden) of the combined categorisations become apparent and can be viewed.

Up to that point, the representation of inclusion has not taken into account the possible relationships between these levels/locations or the changes that may occur among them over time, in the historical dimension. Concept or phenomena do not have a definite 'form' in any given time and they do not reach a teleological state, but rather they are constantly open to re-definition and change. Therefore, mobility –both spatial and temporary- is very important for any attempted representation.

The problem with any social map is that it cannot capture movement, but rather it can only give indication of movement. A way to portray the changes in the

relationships among the elements of each of the categorisations of inclusion, or between them can be achieved by increasing/decreasing the size of a facet or by hiding/making it prominent when the angle of viewing the object changes. In this way at least some of the changes taking place can be visualised.

If it is accepted that inclusion as a term is a new territory, that the locations where it operates may still be under expansion and relationships still under formation, then it can be argued that

- The boundaries of these locations are ‘flexible’ and there is an ongoing definition process, which moves and alters them.
- This definition process takes place at all levels and the power relationships amongst the locations and the literal and symbolic ‘controllers’ of them have not reached a relatively stable state. There is still space for new participants and new orientations in the conflict about what is inclusion and who has, for instance, the power/knowledge/right to define/provide/manage it. Thus one should be ready to observe change and its consequences to the overall representation.

Up to this point inclusion has been presented as a new territory and a visual three-dimensional representation of the ‘body’ of inclusion has been constructed. Inclusion, however, cannot only be presented as an autonomous object but it has also to be contextualised.

Positioning of inclusion

Inclusion has its own 'space' but only a small part of it can be described as a terra nova. In addition, inclusion does not occupy a previously 'blank space'. It is located in pre-existing discourses/places, acquiring at the same time its own space. Inclusion in education is necessarily seen in relation to special education. To return to the list of the developments of inclusion, another way of reading it is as a manifestation of how inclusion has moved from the periphery of special education discourse to the very centre of it. In doing so, inclusion has also affected the way that special education is perceived and has changed to some extent the boundaries of special education discourse. Therefore, in order to have a full picture of the positioning of inclusion, it is necessary to explore its origins and its historical evolution. This means that it is necessary to examine inclusion as a response to and in relation to special education¹³.

Inclusion, *as a response to special education*, is the most common positioning found in the literature (see for instance, Lindsay, 1997). According to this inclusion originated as a critique of the system of special education and of a number of attempts to 'integrate' 'students with special needs' into general education. Here inclusion is defined, more or less, as a 'critical' special education

¹³ Trying to position inclusion reveals some additional difficulties and possible pitfalls of social cartography. These difficulties are concerned with selection, and especially temporal and spatial selection. To represent by reducing in a 'small scale' means keeping the outlines of what is considered to be 'important', and finding a balance between an all-including map and a readable one.

In the case that inclusion is viewed as a response to special education, the issue of time selection needs to define whether it is a generalised representation of past time or it is a specific one in a given period of time. The space selection, on the other hand, comprises decisions about the facets of inclusion that are part of the selection. It should be clear which locations/levels are used in the background and which notions and discourses of inclusion are represented.

discourse. Inclusion is critical because it aims to change the content and boundaries of special education discourse.

However, this is only one way to locate inclusion in relation to special education.

A different understanding of this relationship is to perceive inclusion as a *transformation of special education*. In this case, the inclusive 'rhetoric' is seen as a way of justifying education reforms that promote 'exclusion' and the expansion of special education (Gerber, 1997; Slee, 1997). As Oliver (1988) argues "the history of special education can be seen as a social construction, or rather, a social reconstruction of the problem" (p. 20).

Social cartography may allow 'space' for different perspectives, voices and representations. However, as in any method, the researcher/social cartographer selects the perspectives, representations and voices. Thus, the above two alternative readings of inclusion in relation to special education can be explored in social cartography using an 'inclusive language' of research (that does not position them in 'absolute' relations, i.e. oppositional, contradictory ones).

Furthermore, the second assumption of the understanding of inclusion, presented in Chapter Two, is that inclusion is a discourse that is connected to the democratic discourse of education, and at the same time the democratic discourse of education has historically incorporated an inclusive dimension. Therefore, any positioning of inclusion in education also needs to explore its 'origins' outside special education.

A representation of inclusion that is not limited to the field of special education discourse needs to consider the '*origins*' of inclusion or, in other words, the

influence that other discourses have had in the formation of the inclusive discourse. In addition, one may also examine the response of these discourses to the inclusive one. The citizenship discourse –referring especially to the right to participate in education and equal opportunities- and needs discourse come together here (Barton and Slee, 1999). Participation and especially ‘appropriate’ participation are where inclusion becomes practice (see for instance, Halpin, 1999).

Moreover, the issue of ‘*originality*’ needs also to be explored. Previously, inclusion was described as a ‘new’ term, but ‘new’ does not mean totally original. Considering inclusion as a totally original discourse does not allow space for historical connections and also creates ‘false’ ideological clashes in the field.

Booth argued in 1988 that

My approach to integration is based on a notion of ‘comprehensive community education’ which has a cultural and political meaning and history which is not evoked by the idea of an ‘inclusive school’.

(Booth, 1988, p. 101)

The positioning of inclusion in relation to its origins and originality, locates inclusion in the context that these discourses take place.

As Corbett (1997) suggests “inclusive education is a campaign which extends well beyond issues of schooling and institutional perimeters” (p. 59). Inclusion has emerged in a specific historical moment. Globalisation/Marketisation has affected education and schooling. To some extent inclusion is a discourse of this specific era. It started as a ‘universal’ discourse, as the UNESCO World Conference in Salamanca proves, and it can be seen as an attempt to standardise diverse localised systems of special education.

However, as Daniels and Garner (1999) argue, “there are, of course, limits to the extent to which inclusion can be seen as a context-independent movement” (p. 4). Inclusion is also a localised discourse since it becomes practice in the specificities and particularities of educational systems, schools and classrooms. For instance, Ware (1995) argues that the ‘invention’ of inclusive education in the United States is closely related to the introduction of Site-Based Management in schools. For her, “inclusion assumes policy and practice will be defined at the local level in a process that emerges from the ground up” (p. 129). However, in this text is argued that inclusion needs to be seen as relating to all levels of policy and practice within (and outside) an educational system, and beyond the national to a regional and an international level. At the same time, inclusion can be seen as another policy/practice that promotes difference and fragmentation in education in accordance with a market approach to education¹⁴ (Lankshear, 1997).

Inclusion as a new order

The above comparative framework of inclusion explores and, at the same time, creates a new order of inclusion. There are ‘problems’ with any construction of a new order, of any new representation.

One problem is concerned with the ‘research language’ of inclusion used in this study. The research language used in this framework is the English/British

¹⁴ In relation to recent reforms in education, Rhodes (2000) highlights six elements of these reforms: “privatisation, marketisation, corporate management, regulation, decentralisation and political control” (p. 152). Each of these characteristics may form a dimension to explore inclusion/exclusion (for a feminist approach to marketisation in education, see Kenway and Epstein, 1996. For a discussion of recent educational reforms in England and Greece, see Chapter Nine).

language of inclusion. This also means that 'inclusion as language' is understood mainly in relation to the English/British language of inclusion. To give an example, in the English (British) context the disability movement and the social model of Disability has influenced the development of inclusion (see Chapter Six). If this study was conducted solely in the context of the Greek inclusive discourse, it is not certain that the disability discourse would have had the same position that it has in this framework. The Greek disability movement historically has been very active in the struggle for education for disabled people responding to the realities of the Greek educational system. However, the Greek disability movement responds to the specific 'needs' and political demands of Greek disabled people in the context of the Greek 'reality'. This does not mean that it is an isolated movement, without links with other movements or an international dimension. It means however, that it has to be seen firstly in its own terms and in relation to its own context. As Shakespeare and Watson (1997) argue

In passing, it is important to note that this ideological position should be properly located in British disability politics: the movements in other countries, while adopting a social or minority group approach, have not built their campaign and self-definition around the social model.

(Shakespeare and Watson, 1997, p. 263)

Yet, no representation, no map can be constructed in a 'vacuum' or by a 'neutral' language. Therefore, ways of avoiding the simple 'translation' of all the 'units', to the 'unit' that provided the 'foundations' for the construction of the representation should be found. The assumptions underlining the selection of the above discourses and the ways to overcome as far as possible comparisons that reinforce dominant representations are discussed in Chapter Eight, in which this

comparative framework is used to describe England and Greece as the contexts of this research study.

Conclusion or inclusion as a terra incognita

In this chapter an overview of the comparative special/inclusive education and an alternative comparative framework were discussed. The epistemological/theoretical discussion of the nature and the process of comparison in the field of comparative education, and the research interests of comparative special/inclusive education formed the basis of this framework.

The metaphor of 'mapping' was used in the previous chapter to describe the projects of comparative education. In this chapter the 'method' of social cartography is used to create a comparative framework of inclusion, which at the same time is a comparative inclusive framework. However, in this study/text the production of knowledge is understood as 'imperfect'.

This comparative framework, then, can be perceived as 'inclusive' and at the same time as 'exclusive'. It cannot represent the social world in a one-to-one scale and it is constructed in accordance with a number of assumptions about the topic/inclusion, the aims of the representation, and the nature and aims of the knowledge produced. This dual character (inclusive/exclusive) of the framework has similarities with the construction of inclusion in relation and in comparison to exclusion.

Therefore, in this framework a further element of inclusion is added, that of inclusion as a *terra incognita*. Firstly, inclusion is a *terra incognita* because a part

of it is still unexplored. The definitions of inclusion and the comparative understandings of inclusion are based upon a small number of inclusive 'experiences' across and within educational systems. Therefore, inclusion as a terra incognita can be seen as anything that it is located in the contours and outside of the existing representations of inclusion.

Secondly, in the comparative framework -the representation of inclusion in this study- inclusion as a terra incognita is perceived as everything that the framework is not able to incorporate. In this case, each part of the visual representations constructed with this framework includes a part that is 'unknown' and 'unexplored'.

Finally, inclusion is a terra incognita because its exploration and examination is 'spatially' and 'temporarily' restricted. A terra incognita for this study is, for example, what happened in the schools after the end of the fieldwork or how these schools will be in ten years time.

However, in social cartography terms, terra incognita is not a blank area in the same way that the 'known', 'explored' areas are not completely mapped. Sibley (1997) argues that "mapping provided security: the cartographer was in control and would not be disturbed by other people's map's or alternative world-views" (p. 185). By incorporating terra incognita in the main representation and not outside the boundaries of it, it may be possible to incorporate alternative views on inclusion in the representation, even though these views may be 'known' to the social cartographer.

Part two: Constructing the Research Study

Chapter Five

Introduction to the Messiness of the Methodology

Introduction: Defining Methodology

This part aims to present the ‘methodology’ of the research study. As it has been argued throughout this text the process of ‘researching’ –as well as the process of writing about research- is a messy, complex one. In order to describe the ‘messiness’ of the research process, the following discussion defines methodology as having three interconnected aspects.

Firstly, methodology is seen as each and every decision taken throughout the research process. These decisions can be theoretical, epistemological, methodological, personal, practical, significant (or not), conscious (or not), and so on. All these decisions affect how the topic is understood/researched and the final interpretation/representation given (see Gurney, 1991; Kloos, 1988).

Secondly, methodology is an attempt to formalise how the world is understood according to generally accepted criteria about the nature of the world and the nature/purposes of 'scientific knowledge' (see Bogdan and Taylor, 1975). In that sense, methodology produces criteria to make decisions and justify them according to the aims of research, research methods and procedures, the type and nature of data and the position and role of the researcher. Depending on the particular methodological approach used, some of the numerous decisions that the researcher is faced with become more significant and prominent.

Finally, methodology is a process that at the same time both limits and expands the phenomena under study. It is a limiting process since through the methodology specific expressions of phenomena in specific places and times are examined. It is an 'expanding' process because by focusing upon specific contexts, these contexts gain a new centrality to the relevant disciplines/discourses. Elements of the 'everyday' and 'natural' become subjects of scrutiny and they are analysed, typified, and categorised. Descriptions are made of them and generalisations/theories are connected to them, and finally they become written 'accounts' of specific fields of knowledge.

Using these three parameters to define methodology provides the opportunity to move away from the dichotomy between methodology as a perspective/approach, and as research process, which is found in the literature. In this dichotomy methodological approaches are seen as the 'ideal' of what should happen and the research process as the 'reality' of what happens. Trying to go beyond this division –even in the symbolic separation of chapters- may be necessary because

by ‘contaminating’ the ‘ideal’ of any methodological approach with the ‘reality’ of the research process, it is possible not only to be critical of the former, but also to locate it where it really belongs; in the research process.

Walford (1998) argues that

I find navel-gazing accounts from doctoral students that record every detail of their own learning process very boring to read [...]. For doctoral students, the reflexive account should certainly include consideration of the importance of the researcher within the research and a discussion of personal influences on the research process, but the essence of the account is to show that a successful piece of research has been conducted, and to explain where justifiable decisions were made.

(Walford, 1998, p. 5)

This understanding of doctoral students’ research accounts is interesting, especially since most of the early research accounts –before this exercise become fashionable- were based on doctoral research (see for instance, Burgess, 1984a; 1988; 1990; 1994). The main problem, however, with the above extract is the argument that doctoral students should prove that they conducted a ‘successful’ piece of research. As it will be argued in this chapter, what a ‘successful’ piece of research is cannot be separated from assumptions about the nature and purposes of research, and of course from the readers’ viewpoint. Thus the degree of ‘success’ of any study is relative and open to change.

These three aspects of defining methodology acknowledge also that any presentation/description of the methodology of a study is to some extent a ‘partial’, constructed narrative (see Bruner, 1987). Methodological accounts are selective, demanding a re-organisation of the actual ‘time’ and ‘space’ of the research and a narrative logic that define them as texts that can stand alone.

The account of this research that follows in this and the next two chapters does not present the research process as a linear one. Each of the three methodological chapters revisits the same issues, trying to answer the question: '*What is the research process and what happens during it?*' However, each chapter focuses more specifically on one of the three interconnected aspects of methodology presented above. Thus, this chapter discusses decision-making, the next one discusses how this research constructs knowledge within the context of a research paradigm, and the final chapter presents research as a limiting/expanding process. Therefore, the rest of this chapter does not follow the research process from the beginning to the end, but rather it focuses on specific critical incidents/decisions that –in retrospective- can be seen as very significant for the research and the evolution and change of the methodology of the study. Two such 'critical incidents' of the research study are used, and alternative readings of them are given.

Woods (1996) describes critical events in educational settings as “exceptional kinds of activity that occur from time to time in schools and that bring radical change in pupils and sometimes teachers” (p. 118). The importance of 'critical incidents' is not always apparent at the time when they happened. In a sense, critical incidents are events that become significant later because of their 'reflective' potential (see also Woods, 1998, and Carspecken and MacGillivray, 1998). They give the opportunity to the participants to reflect both upon the events and upon their own role in them.

The first incident is the first day of the empirical study in the English school and the second one is the process of gaining access for conducting research in Greece.

I will use these two incidents as the starting point to discuss the methodology of the study, and especially the comparative and ethnographic aspects of it and the role of the researcher.

Two critical incidents of the research

First critical incident

I had been in the school twice before to meet the SENCO and one of the senior teachers in order to arrange access and organise with them my role in the school. I had also been introduced to the head teacher. The plan was to follow initially two forms (year seven and eight) and later to add a year nine form, in a range of lessons, starting with a provisional timetable for the first few weeks, until I had decided what exactly I wanted to do. In the first two weeks it was decided to concentrate only on 'observations', and later I would be able to help/support in lessons and participate/interact more in that role. What follows is an extract from the fieldnotes of the first day at school.

"First day at school. I arrived there too early. I was told to be there before nine o'clock, but I miscalculated the journey and I was there five minutes after eight. On the bus there were four or five pupils from the school. I recognised them from the school uniform. I could not find a place to wait outside the school, so I went in. I had this 'embarrassing' experience waiting outside the Office for some minutes. I explained to someone (I assumed she was one of the administration staff) why I was there.

“After a while one of the special needs assistants came and introduced herself. [...] She told me that I was to be in some lessons with her and asked about the proficiency of my English [...]. We went in the staff-room (later I found that there are three staff-rooms) and she introduced me to the people that were there, saying that I was going to work with the “special needs team”. From what she said I understood that the special needs assistants sit together in the staff-room [...].

“After a while the person responsible for my stay at school came into the staff-room and we went to his office. He gave me all the information that I wanted (special needs policy, the form and SEN register of students of the forms that I was going to follow, and my provisional timetable). Someone entered the room (I thought that he is one of the senior teachers) and he said that he saw me waiting outside the head teacher’s office and “that is not good”. I did not understand the joke and the SENCO realised that I did not understand what he meant and he explained to me that usually people [does that mean mainly students?] are outside the head-teacher’s office for doing something bad. He continued that sometimes they are there for good reasons, but this is rare [...].

“The same special needs assistant collected me for my first lesson. I was already confused with the layout of the school and I had no idea where the classrooms are and where I had to go [organisation of space is different from Greece where students stay in the same classroom for most lessons]. While we were walking to the other building she gave me some information about the children in that form and especially the ones with ‘special needs’ [...].

“The first lesson was English. We entered the classroom and the teacher was already there, talking to the students. I have met her before. She took the register and introduced me to the students saying that I was from Greece and I was going to stay for some time to see how the school works. She used my surname but I think that the students found it difficult. Then she and the special needs assistant distributed the books and I helped with that.

“I had no idea whether I could sit down or stand and where. I tried to be close to the special needs assistant without being in her way, but I did not know whether to take out my notebook, and whether my ‘position’ in the classroom was mine, or the teacher’s decision [...].

“Meanwhile the teacher started the lesson. She read a text [I understood that this was a new text and there was no ‘examination’ of the last lesson. The structure of the lesson seemed ‘different’ from the outset from lessons in Greek schools] and set them the task to answer some questions about the text. The special needs assistant (she was standing up to this point) went to help some students. One of them asked her for help, another one looked in her direction, and another one did not ask for help but she approached him nevertheless.

“The teacher, on her way to help some students, gave me a sign to go and help a girl sitting alone at the back of the second row of desks. Although the arrangement was for me only to observe in the first two weeks and I had no idea what ‘help’ I had to give (or I was able to), I went. The girl had her textbook and exercise book open but had not started answering the questions. I asked her name and I said my name to her. I said to her to read the first question. Then, she told me “I can’t read”.

“This was the second big surprise for me in five minutes and I had no idea how to react. I tried to remember whether I read her name in the special needs register and at the same time I was trying to find out what “I can’t read” meant. I started thinking like a teacher trying to assess the knowledge and skills of a student while I had to help her with the task without knowing what kind of ‘help’ I should provide. Although I hate reading aloud in English and I do not like my broad, foreign accent, my ‘silent’ period as a not very competent ‘bilingual’ was over. I felt that I had to ‘help’ that girl and to prove, of course, to myself and to the people in the school that I can ‘participate’ in, and ‘research’ the school.

[...]

Issues to reflect upon for future observations:

- I don’t understand everything that is said. The accent of some of the students and when people speak at the same time are two problems. To what degree will this affect the accuracy of the field notes?
- I don’t know whether I will be able to keep notes during lessons since from the first day I started helping.
- I am not sure how it is possible to ‘evaluate’ what I observe. When I think that this was a good lesson or a well-planned one, or that this teacher seems ‘strict’, I don’t know whether my understanding is similar to the shared experiences of the participants.
- I don’t know whether I did or said something wrong or inappropriate [...].”

Second critical incident

The second critical incident is of a different kind. What follows is a description of what happened in Greece when I tried to gain access for conducting the second part of the study. This description is an edited version of a report that I wrote after I returned to England.

“In September 1998 I went to Greece to conduct the second part of the ethnographic/comparative study. I had completed a nine-month research in the English school and I had conducted interviews with students and teachers.

“I knew that it was not possible to use exactly the same ethnographic methodology in Greece because of the structural differences of the two educational systems. For instance, it was not possible to be a ‘participant’ in the Greek school, since provision/legislation for the presence of a second adult/teacher with teaching or other related responsibilities does not exist. I was prepared to ‘adjust’ the research design to the structure of the Greek educational system, but at the same time I wanted to have as ‘equivalent’ a methodology as possible and to explore the ‘ethnographic methodology’ in a Greek secondary school.

“I was also fully aware that gaining access and being accepted in a Greek school was much more difficult than it had been for me in England. In fact, gaining access and being accepted are two different things. The Ministry of Education in collaboration with the Pedagogic Institute gives official permission for research in schools and other educational institutions, but then, it is left to the discretion of the head teacher and the individual teachers to accept and support the research.

“I started the procedure of gaining access the previous May in order to have the permission by September. However, returning to Greece I found out that the application never left the desk of the person where it was submitted because it was considered to be ‘incomplete’. No one had contacted me asking for corrections [...].

“In order to speed up things, I tried to overcome ‘Greek bureaucracy’ by arranging to meet someone in the Pedagogic Institute and gain an unofficial permission before the official one. This attempt failed because of the nature of the methodology. The person that I met that day said that, if I had wanted to give out some questionnaires it would have been easy and straightforward, but he could not give me unofficial permission for a long stay in a school. I wrote a new application, which explained more about the selected methodology. The waiting time for the application to be processed was one to two months and I hoped to start the research by December [...].

“In the meantime in Greece a big debate about the recent Education Reform was in progress. This debate had resulted the previous year in a two-month strike of teachers, and a general dissatisfaction among teachers and students in schools and universities. It was clear that an outbreak of student activism was very possible and by the middle of October students in some schools decided to ‘close their schools down’. This unrest started in Athens where I had planned to do the research and other cities followed. To give an idea of the extent of the students’ movement, before Christmas the number of closed schools was approximately

2000 out of the 3534 compulsory and non-compulsory secondary schools and 80% of Athens schools were closed.

“The closure of schools not only delayed the research but it had implications for the kind of ‘access’ that I could get. On the one hand, I wanted to arrange access in a school where the head teacher and staff would have some interest in the research. On the other hand, I knew that it would be very difficult to persuade a head teacher to accept my staying for a long period of time in the school without having the official permission by the Ministry of Education [...].

“The person responsible for my application called me at some point during the process and asked me whether I had already contacted any school and when I answered that I could not do that without having the permission for the research, he said, “Here it is not England”. This meant that I should be prepared to do things without following the right procedure and that I had to familiarise my self with the ‘Greek way’ of doing things. I found this comment very ‘amusing’ since I had lived almost all my life in Greece and I had been part of the educational system both as a student, university student, and teacher. I considered myself as having the necessary knowledge and skills to understand what I had to do in different situations.

“Finally, I got the official permission at the end of February, the same time that the students decided to re-open the schools. I arranged a meeting with the head teacher of an almost ‘arbitrarily’ selected school in the area that I planned to research, but he was not there when I went for the appointment and I finally met him at the beginning of March. There were ten weeks of lessons left before the end of the school year and I knew that it was impossible to follow the plan of the

research. In the particular school they had decided to cover for the missing lessons on Saturdays and this was an additional problem because I understood that it would have been extremely difficult to negotiate interviews with the teachers.

“I was prepared to answer all the possible questions that the head teacher may have had and I thought that it would have been very difficult to persuade him to co-operate. However, he did not ask any questions and in fact he said that I could do whatever I wanted in the school as long as the teachers were happy with it. The meeting lasted approximately ten minutes and at the end of it he introduced me to a teacher who by chance entered his office and he asked her to help me. In fact, he said that I had to arrange everything with the teachers because it is not his job since he was only responsible for the “administration of the school”.

“Neither he nor any other person in the school had read my research proposal or the shorter version in ‘plain’ Greek that I was asked to write by the person responsible for my application in the Ministry of Education.

“That first day I arranged three observations in three different forms with the teacher that I met in the head teacher’s office. She asked the teachers to accept me in their lessons as an observer (one of them refused due to the disruption that the presence of a new person may have caused in the class. This lesson was replaced with a different one). The day that I went for the observations I also gave out the parental consent letters for the students to take home. However, without a proper introduction to the staff and without the necessary information to know which people I could approach, I felt that I didn’t belong to that place.

The head teacher gave me access to the staff room and I was spending the breaks there trying to inform teachers of the reasons I was there.

“After these initial contacts I started the interviews with the students and although I had problems with sorting out difficulties such as the place of the interviews and gaining permission from teachers to take students out of lessons, I felt that the interviews gave me good information about ‘inclusion’. In fact the students had accepted me very easily and they were willing to participate in the interviews.

“I was trying to make the most of the time that I had, but I was feeling that what I was doing was not what I had planned. I thought that maybe the compromises that I had made in order to collect a minimum amount of data were greater than the ones that I had been prepared to make beforehand. In general I was very happy with the interviews but that was my only involvement in the school and I felt that I could not negotiate that.

“This was not only the result of lack of co-operation and help from the head teacher but my personal inability to deal at that specific time with these difficulties. On the one hand, I felt that everything had gone wrong and I was tired of sorting out problems. On the other hand, I had a number of personal and health problems to deal with at the same time. Especially after the Easter holidays, I was very negative about going to the school and on two occasions I went up to the gate and then left. I tried to overcome this by sleeping in friends’ houses so they could wake me up and drive me there but it didn’t help. I was not thinking about the research and how to improve it, but how I could avoid it.

Finally, in the middle of June I decided to stop the research, return to England and give myself some time to reflect upon it [...]"

Possible readings of the two critical incidents

These two incidents can be read in many ways. Firstly, as texts based on fieldnotes they have what Jackson (1995) describes as the 'liminal qualities of fieldnotes'. For Jackson, field notes are "both *déjà entendu* because they are so linked to the anthropologist, who created them and evidence of just how mysterious and *jamaïs entendu* "the field" can be" (p. 72). The narrative of the two incidents captures part of the 'reality' in the field as the researcher experienced and interpreted it (Abbs, 1974). Fieldnotes are both 'scientific' and autobiographical texts and in this dual role they are 'loci of knowledge' (Corradi, 1991) challenging claims of objective knowledge (Söderquist, 1992) (see also Harrison and Lyon, 1993; Stanley, 1991).

Another reading can be based upon how 'successful' the researcher/I was in negotiating 'access', following the research design, and responding to different situations. In fact, both these incidents were recorded according to this kind of approach to research. The account of the first incident gives information about the experiences that I found difficult, problematic, and new/strange and it records my anxieties for the future of the study. The second incident is reported as a series of dead-ends and failures. Both accounts assume a standard of successful research that I was striving to reach.

A third way of reading the two incidents, closely related to the previous one, is by using the metaphors of 'rite of passage', and/or 'struggle'. These metaphors incorporate a notion of research as a '(difficult) learning process' during which the researcher is faced with new/unknown situations and can respond to them in different ways, having a number of positive and negative feelings and emotions. The metaphor of 'struggle' –Delamont (1984) uses also the metaphor of 'young warriors' (p. 17)- can be used not only for ethnography and fieldwork but also for any kind of research and at any stage of the research process. For instance, Woods (1999) argues that researchers as writers should aim for "a kind of controlled madness" (p. 10) and that "pain is an indispensable accompaniment in the process of data analysis" (p. 11).

A criticism of these metaphors comes from Clough (1992) who argues that the struggles of the 'heroic' ethnographer and subjects of research "appear at the surface of the text only as the manifest or screened content of another struggle, the struggle of authorial desire" (p. 19). Although the research process can be seen as a 'rite of passage', what is missing from this understanding is what it is at the end of this process. For some researchers, central to this process is the 'fear of being an incompetent field researcher' (Kleinman, 1991). As Lareau and Shultz (1996) argue, one of the reasons for omitting to include in research accounts the researcher's self, and anything that happened during fieldwork that may have jeopardised the integrity of the study, is fear.

The teleological character of the 'rite of passage' metaphor is very important. The (happy) end of the whole experience defines it, the fact that the researcher

completes their transition to full-membership of the academic community (for a discussion of disability as a liminal condition, see Willett and Deegan, 2001). This process is spatially and temporally specific; the starting and ending point is the same. As Okely (1996) argues

S/he [the anthropologist] is said to undergo a painful and isolating experience in a liminal area before he or she returns as a full member of the academic club. This criticism thus disposes of the experience. The anthropologist is then said to enter the field in order to return, he or she is not said to be in anthropology in order to enter the field.

(Okely, 1996, p. 41)

A fourth way that these critical incidents can be read is as an exploration of what a comparative ethnographic study can be. In this case, the 'methodology' of the study is not seen as static and pre-defined, but as emerging from, and evolving during the research process. In order to explore the evolution of the methodology of the study, it is necessary to reflect on these two critical incidents as I understand them now, after 'leaving the field', and to explore what is hidden in them and what is missing.

Comparative and ethnographic methodology/research process

Going back to the initial conceptualisation of the study, the comparative ethnographic approach was selected because it could produce detailed information about what inclusion is and how it is defined in the two contexts (see Vulliamy et al., 1997), and in a way that (hopefully) could lead to 'sound' comparisons.

However, at that time I was unsure whether I was able to make 'sound' comparisons. One reason for my lack of confidence and insecurity was the fact that the conceptualisation of inclusion presented in the previous chapters, is not based on the assumption of an explicit conceptual 'equivalence'. 'The theoretical equivalence' of this conceptualisation is based on the argument that the underlying meaning of inclusion –struggle for participation and citizenship- is similar in different contexts. However, the expression of this can take different forms in different contexts. This conceptualisation is methodologically problematic since it does not focus the topic on specific expressions of inclusion, nor does it give indications of what exactly inclusion is and where it can be found and researched.

To 'compensate' for the lack of theoretical equivalence, I attempted to design this study with a degree of methodological/sampling equivalence. This meant that the ethnographic studies in the two countries would have followed the methodological tradition of 'school ethnography' (Hammersley, 1990b; Burgess, 1984a; Ball, 1981), with the ultimate aim to produce 'comparative data'.

This approach proved problematic from the start, since it attempted to keep 'ethnographic' and 'comparative' methodologies separated and 'immune' from each other and from the theoretical framework of the study. In addition, the comparative aspect of the methodology 'dominated' the ethnographic aspect, which was seen mainly as the method/technique for collecting the data.

A further reason for my insecurity is evident in the account of the first incident, in which my main concern was that I was not sure what I was observing and how I could interpret what I was observing, since I did not have any previous

experience of English compulsory education. By trying to achieve a 'methodological equivalence', I hoped that the comparisons would emerge from the data and that they would provide validity and legitimacy to the research.

The assumption was that it is more appropriate, desirable, or easier to compare 'similar' or 'equivalent' contexts, schools, concepts, and phenomena, and that all the above become more 'similar' or 'equivalent' when more 'factors' are 'controlled', including the methods of collecting data. This assumption however contradicts the theoretical conceptualisation of inclusion.

The tension between 'qualitative/ethnographic' and 'comparative' methodologies had also a number of implications for the design of the research as far as the 'successful' application of the two methodologies was concerned. The question was whether two schools constituted a sufficient 'sample' for making comparisons and generalisations and whether it was possible to conduct a detailed ethnography in two schools within the time limits of the research. I had the impression that combining the methodological/research approaches had resulted in compromising them.

In order to avoid seeing the methodology of the study as an inevitable 'compromise' between the 'ideals' of the two methodological approaches, I tried to move away from dichotomies such as quantity/quality, breadth/width of research, and micro/macro levels of analysis and theorising. This process of re-defining the methodology started during the first stage of fieldwork in the English school and was mainly due to the experience of fieldwork.

At first, I tried to explore whether the tension between comparative and ethnographic methodologies occurred because they are different ways of knowledge construction demanding different views of the world. The ways then, that the social world is examined/researched, affect the kind of 'knowledge' recorded and generated. This does not mean that different methodologies record different 'worlds', but rather that they record different expressions of the world, possibly in a different 'language'. Of course, comparative and qualitative methodologies comprise different approaches to exploring different 'worlds', and as Cowen (2000) argues,

We are coming out of a world of multiple comparative educations [...]. However, these comparative educations were not only reading different worlds –it is crucial to remember they were in different worlds.

(Cowen, 2000, p. 335)

Therefore, different methodologies perceive in different ways the relations between the world, the production of knowledge and the role of the researcher. For example, Comaroff and Comaroff (1992) describe ethnography as following:

Ethnography does not have to respect a binary world-map, let alone the axes of typological difference. As a mode of observation, it need not be tied either to face-to-face scenes or to a specific sort of social subject.

(Comaroff and Comaroff, 1992, p. 32)

A similar understanding of comparative education is very difficult to be found because of the tradition of the field and its role in the modernity project.

The presentation of comparative education in Chapter Three is informed to some extent by this argument. Although this argument is of some help and gives some answers to the problems of this research, it does not provide the means to

'combine' the two methodologies, and again focuses on the 'methods' of the two methodologies.

Limiting ethnographic and comparative methodologies to their 'methods' is misleading because the application of specific 'methods' is culturally defined. 'Methods' are usually presented as a-cultural and as being applicable more or less to any context. The second incident highlights how 'school ethnography' was affected by the organisational and cultural conditions of the Greek context. At first glance, the difficulties of applying 'school ethnography' in Greek schools may seem to be a practical issue of access. However, what appears from the outset as an access problem, relates to how schools are organised and how teachers' autonomy is defined. In addition, it relates to the role of research in Greece (from schools, to universities and the Ministry of Education), and the status of researchers.

One way to develop this argument further is to see the tension of qualitative and comparative methodologies not simply as an issue of 'knowledge construction', but more specifically as an issue of 'scientific' knowledge construction. The question is not any more the different 'methods' used but rather how each methodology moves from the 'knowledge' found in the world, to 'knowledge' defined as 'scientific', knowledge that can be part of a (social) science discourse.

As Carr (1997) argues:

The notion of 'method' now shapes the self-understanding in terms of which educational researchers make sense of what they are doing, define their cultural identities, and legitimise their social role.

(Carr, 1997, p. 204)

It can be argued that qualitative and comparative methodologies are not in conflict because they are 'different', but because they 'emphasise' and keep 'hidden' different aspects of the process through which knowledge is constructed and legitimated.

The request for 'equivalence' can be seen as one of the 'methods/strategies' of comparative research in order to 'control' and make 'scientific' the research process¹⁵. A similar example in qualitative/ethnographic research can be the 'interview', which is one of the most commonly discussed methods (see Chapter Seven). The problem is that 'equivalence' imposes a particular notion of comparison, and hence criteria about what can and cannot be compared. Seeing equivalence in such a way does not imply that it is not a 'useful' concept for this research study, but rather that the methodology of the study is cautious of the theoretical and methodological 'equivalence' that may be 'imposed' on the phenomena and contexts observed.

Final reading of the two incidents

Thus the final reading of the two incidents attempts to portray an alternative way that methodology can be understood. In this reading 'equivalence' is seen neither as the means nor as the desirable outcome of the research, but as one of the concepts that can be used to make sense of what happened during the research.

In this reading of the two incidents the comparative and qualitative aspects of the research are seen as a unity –as part of the 'methodology' of the study- and as

¹⁵ See also Carr, 1995, for a discussion of the relation between philosophical theory and method; Lloyd, 1995, for a discussion of ontological tyranny and methodological objectivity.

inseparable from the theoretical conceptualisation of inclusion. In addition, this final reading attempts to give an alternative 'narrative' of the two incidents, in which theory, methodology, the participants in the research and the researcher are seen together. This reading uses two themes that are extracted from the incidents and which are theoretical, methodological and analytical ones.

The first theme is this of *close/open spaces and ownership*. Inclusion/exclusion may be perceived as the right to be/participate in specific settings/places, at the same time as the right of 'owning'/having a say about these settings/places. Inclusion is not a 'passive' right that is 'given' to individuals and groups. On the contrary, it is an 'active' right requiring the constant negotiation of its meaning by all involved in the process of inclusion.

The two incidents give some indication of my inclusion/exclusion as a researcher in the two educational systems/schools and of what inclusion is, and who control/'owns' access to it. The two incidents also give glimpses of other instances of inclusion/exclusion.

Starting from the two educational systems, they can be seen as having different degrees of openness/closed-ness and allowing different access/participation to specific settings/contexts. One way to describe these differences is to see them as examples of a centralised (Greek) and a decentralised (English) educational system. This dichotomy is not very useful because it cannot encompass the complexities of openness/closed-ness and the changes that the systems may undergo.

For instance, arranging access for research in Greece is controlled centrally and involves a procedure starting from the top (Ministry of Education) and ending at

the school. The system as a whole gives the impression of a closed one where decision-making/‘ownership’ comes from ‘above’. However, the ‘school’ –the head teacher or the teachers as a group or individuals- may accept (or not), or give their own interpretation to the central decision, and can therefore choose whether to ‘close’ and ‘open’ the school to the researcher. The head teacher, who proposed to arrange access with individual teachers for me, may have done so because he was ‘indifferent’ or ‘unwilling’ to take responsibility for a decision already made by the Ministry of Education. He may also have considered it appropriate to gain teachers’ consent (see Pigiaki, 1988 for a similar incident). However, he refused me the opportunity to gain a ‘collaborative agreement’ (Farish et. al, 1995) from the teachers’ committee.

In addition, the specific position/role that individuals have affect their ‘access’ to the school. When the special needs assistant introduced me as someone who was going to work with the ‘special needs group’ she opened a specific role/space for me in the school and at the same time affected my role as a ‘researcher’ and how the research was understood in the school.

Closed/open spaces and ownership can also be literal ones (see F. Armstrong, 1999). Waiting outside the ‘office’ –a closed space with specific connotations- or going up to the gate and not entering the school are two examples of that. The fact that I could identify the students of the English school on the bus from their uniforms is an example of how the ‘school space’ is extended outside the school grounds. Finally, the closure of schools by the students is an example of change of ‘ownership’ of school space and reversal of control of the openness/closed-

ness. In this particular case 'ownership' is connected explicitly to notions of citizenship (see Chapter Ten).

Furthermore, the fact that I tried to keep the two methodologies separate from each other and, is an attempt to create distinctive, and manageable 'spaces' for them, even though this was not working in practice. For instance, while I was waiting for the official permission to conduct research in Greece, I closely followed the students' unrest by participating in demonstrations, collecting newspaper cuttings and talking to people involved. For example, at that time I worked part-time as a research assistant in an in-service teachers training programme at the University of Athens and I had the opportunity to talk about inclusion with teachers from different parts of Greece. At that time, I did not consider this as 'fieldwork' since it was not compatible with the research design and it did not fit into my definition of 'school ethnography'.

The second theme is that of *knowledge construction*. In the first incident knowledge construction is apparent in the description of the lesson, or better in my inability to describe the lesson without comparing it and starting from my own experiences. While the teaching/learning methods, the pedagogy underlying the lesson, and the curriculum were not clear to me because of my professional and cultural experiences I could recognise what was happening as known and familiar (see for instance, Schwandt, 1999, for a discussion of the difference between knowledge and understanding).

Burgess (1984) argues that, "of all social institutions, schools are highly familiar settings" (p. 26). The two incidents give indications of how a comparative

ethnographic methodology can highlight the degree that the familiar/strange are not concrete and given, and the preconceptions that underpin them. In addition, the 'different' lesson structure, teaching and learning methods and pedagogy are crucial in identifying what 'inclusion' is in the two educational systems and whether or not inclusion is restricted by them.

The ways that knowledge is constructed in the research process and how the positioning of the researcher affects this knowledge are also evident in the two incidents. The first account is written from the viewpoint of someone who does not 'know' and who is an 'outsider' in the culture of the specific context. The second one, although it describes a chain of problems, is written from the perspective of an 'insider'. In practice, in the first case I was an insider feeling an outsider and in the second case I remained mainly an outsider perceiving myself as an insider (see Oliver, 2000, and next chapter).

Finally, knowledge construction is related to notions of competence/incompetence. When the girl in the English lesson said "I can't read" or when I wrote, "I don't like to read aloud in English" we both defined our 'competence' in a specific context. The ways that 'competence' is understood is connected to inclusion in and exclusion from educational settings. Whether I have been a 'competent researcher' and whether this text can prove that, and finally what a 'competent researcher' is and who defines it is as much a question of this text, as the question of how a 'competent student' is defined in schools.

A final element of 'competence/incompetence' in the two accounts is 'special educational needs'. In the second account there is no mention of the term, though it is mentioned several times in the first one to define specific students,

roles/positions of members of staff in the school, and my position as a researcher. This again is connected both to the meanings of inclusion and the conceptual equivalence of the research study, and how different 'special needs' discourses affect what is considered as inclusion/exclusion in mainstream schools.

Conclusion: the three stages of the research

Before closing this chapter, the three stages of the research are presented. What follows is a short description of what happened after I stopped the Greek fieldwork, and an overview of the three stages of the research and the main methods used in each of them.

I went to Greece again in the autumn of 1999 in order to collect additional data. This time, I had abandoned the idea of conducting a 'school ethnography' similar to the one conducted in England, since I did not have enough time (practical problem) and I thought that trying to achieve this level of methodological equivalence was problematic (methodological issue). On the other hand I felt that the twenty-two interviews that I had conducted with students were not enough and that I did not have any kind of 'data' about the teachers' perceptions, and most importantly I felt that I wanted to try again. I decided to develop the methodology around the two notions mentioned above. Thus, I was prepared to accept –to some extent at least- definitions of access and appropriateness of the research methodology given by the gatekeepers in the school.

This time I contacted a different school and with the help of a teacher who was working there attempted to initiate the process of access from the inside. The head teacher was willing to give me access to the school providing that I had the official permission from the Ministry of Education. I started the process of extending the previous permission and changing the named school. Again there were concerns that some schools would close due to students' activism and I had to hurry before this happened. Finally, I decided to ask help from someone who knew people in different positions in the Government to help me to speed the whole process. With the help of that person, it took less than one week to get the revised permission.

When I met the head teacher I asked to conduct interviews with students and distribute a questionnaire to the teachers. I also asked to stay in the school for three weeks, planning to conduct the interviews first, distribute the questionnaire and then arrange some observations of lessons, if I thought that I had managed to create some kind of 'relationship' with teachers.

However, the head teacher thought that I would be able to conduct the interviews I needed in three days and finally we agreed on a maximum stay of one week. The head teacher took the responsibility of informing the teachers and students, and of distributing the letters for parental consent. He proposed that the teachers send students to the room where the interviews would take place one after the other, regardless of the lesson that they had, and that I could even use break times.

Therefore the three stages of the research are as follows:

English school: The access to the school had been arranged at the end of the previous year. In the English school I stayed for nine months (September 1997-beginning of June 1998) for three days a week. One form was selected from each year of the lower school as the main sample of the research. All of the forms included a number of students with statements of special educational needs and support staff was present in most of the lessons. In the subjects where these forms were in settings, I observed the lower sets. I observed a variety of subjects: English, maths, science, IT, French, geography, art, music as well as year assemblies and tutor time, but I did not observe any lessons in technology, RE, history or PE. Hammersley (1984) describes how he dismissed 'systematic sampling' in his school ethnography because it would have meant "observing games, woodwork, metalwork and PE lessons and I didn't count these as part of the 'serious' business of the school" (p. 50). However, in this study the omission of some lessons was the result of deciding to keep the initial/provisional timetable throughout the study. This was due to the fact that continuity was seen as more important than covering all lessons.

The 85 pupils from the three forms (covering the three years of the lower school) constituted the main sample of the research (see Appendix I) but the number of the pupils observed on a regular basis was around 160 from the 750 students of the school. Interviews were conducted with 59 of the 88 pupils from the three forms and 19 members of staff.

The members of staff interviewed were involved with one or more of the forms. The head teacher, special needs' coordinator, two teaching members of the SEN department, five child care assistants, ten subject teachers, including one form

tutor and two members of the Senior Management Team of the school were interviewed¹⁶. Finally, a number of documents were examined such as documents about the organisation of the school, pupils' files from the special needs department, records from one of the tutor groups, and records concerned with discipline.

First Greek school: Arrangements for access started in May 1998. The second application was submitted in September and official permission was given in February of 1999. The research in the school started in March and I went to the school for fifteen days up to June. Three forms were selected (one from each year) and one observation was conducted in each form during which I also presented the research to the students and gave them the letters of consent. Interviews were conducted with twenty-two students from these forms. The selection of the forms was based upon the opinion of one teacher and the head teacher that they were 'challenging'. No documents were examined since the Ministry of Education did not give me access to the students' files.

In the period between October and February a number of documents were collected relating to the students' activism, and casual observations were made of demonstrations and other organised activities such as public rock concerts in support of the students' movement, and incidents of road closure.

¹⁶ The majority of the staff interviewees were women (16 out of the 19). This gendered imbalance was to some extent due to the almost random construction of the timetable for the observations. It also relates to the inclusion of a big number of members of the SEN department –including child care assistants who tend to be women.

Second Greek school: Access was arranged from November 1999 until the beginning of January 2000 and the fieldwork took place in February 2000. Three forms were selected, one from each year, and thirty-seven interviews were conducted with students from these forms. The selection of the forms was almost arbitrary. One form was selected based upon the opinion of the head teacher and another teacher that it was a 'difficult' form and the other two were selected as 'typical' of the school. Nineteen out of the twenty-nine of the teachers completed a questionnaire¹⁷. Thirty-seven interviews with students were conducted in four days.

To sum up, in this chapter the methodology of the study has been presented in its raw form. This presentation has followed three aspects of methodology: decision-making, methodology as a discourse of knowledge construction, and methodology as a limiting and expanding process. Two critical incidents were used as the starting points in order to move back and forward and to demonstrate some aspects of change and development of the methodology. However, this chapter did not attempt to explain everything that happened or to answer all the problems/questions that were raised during the research process. Some of these questions will be revisited in the following chapters and their partial answers can be found in how they are problematised throughout this text.

¹⁷ The nineteen teachers that completed the questionnaire cover the majority of subjects taught in the school. In similar vein with the English school, fourteen out of the nineteen teachers were women, four were men, and in one questionnaire gender (as well any information that could be used for identification) was not filled in. The only explanation for this gender difference that I can think is that women returned their questionnaires, while men did not. Since I stayed only for four days in the school, which was not sufficient time for all the teachers to be approached by me, it was decided to distribute the questionnaire centrally, and for the teachers to return them in the school office in sealed envelopes.

Chapter Six

Putting Methodology into Context: the Elusiveness of an inclusive Methodology

I.S.: Is there something else that you want to say about school?

Boy: Only...Could you tell something to the head teacher?

I.S.: About what?

Boy: Not to talk [to us] so harshly, because all the children are afraid of him.

(Boy, year A', 2nd Greek school)

Introduction: Methodology as a knowledge construction discourse

In the previous chapter the methodology of this study was presented as an integral part of theorising and analysing inclusion. In this way the two themes of this text, as they were presented in Chapter One, the research process in the two contexts, the tension between qualitative and comparative research, and the role of the researcher in undertaking and making sense of the 'everyday act of research' were brought together. It is important to reiterate that this presentation was a partial, incomplete and selective one –both in terms of what was discussed and what was omitted.

In this chapter the same issues are explored further by using the concept of *the elusiveness of an inclusive methodology*. This concept is used in order to discuss methodology as a knowledge construction discourse, which corresponds to the second aspect of the methodology presented in the previous chapter. Research as a knowledge discourse examines and interprets social reality, and at the same time constructs a framework within which social reality can be interpreted. As it has already been argued, the aims and purposes of research and its theoretical and methodological approach define the way that knowledge about the world is created.

Inclusive methodology is neither a distinct type of research nor a new add-in to the existing ways of conducting qualitative/comparative research. It is rather a concept that I find helpful in order to make sense of the research I have conducted and of my uncertainty and uneasiness towards it. Inclusive methodology brings together the topic of the research with the principles and assumptions underlying it. In this way, inclusive methodology explores how this research relates to current perspectives and debates in social science research, and becomes part of a knowledge construction discourse.

This study follows a paradigm of research that understands research as a discourse that exists and operates amongst other discourses, and which creates interpretations of social phenomena. In this paradigm research is perceived as producing knowledge about the social world, which legitimises (or not) specific expressions of social phenomena. For many researchers from different but interconnected perspectives, such as critical, feminist and disability perspectives

-to name the ones that most influenced this study- research is a political and therefore ideological act, which should produce knowledge that highlights the structures (and/or discourses) of social inequality and oppression. At the same time, research should empower oppressed groups in their struggle for social change.

In order to achieve this, researchers need to see critically their role as 'producers of knowledge' and the means (theories, methodologies, research methods) they use. Thus, researchers should be reflective of their knowledge/power position, and 'accountable' not only to themselves and their peers, but also to the subjects of their research. This understanding of the purposes and process of research brings epistemology, ontology and methodology together and each of them informs the others, and the same assumptions underpinning the examination of the social world are applied to the research process and the role of the researcher.

This is a sketchy overview of a very broad research paradigm. Over-simplified descriptions of any paradigm may leave its core assumptions open to criticism. For example, Hammersley (2000) presents an overview of the 'critical approach' (pp. 134-135), which has similarities with the one presented above. He continues with a critique of the critical approach from the viewpoint of an 'analytic approach' arguing that the critical approach is

...insufficiently critical: as placing excessive reliance on prior assumptions about the nature of the social totality, assumptions that are neither common-sense nor well-established on the basis of empirical research.

(Hammersley, 2000, p. 136)

He focuses his critique on the ‘concept of ideology’ and the ‘functionalist mode of argument’ and how these “argumentative devices are self-serving”, leaving critical research and the knowledge it produces open to the danger of becoming a ‘form of dogmatism’ (p. 137) (see also Foster, Gomm, and Hammersley, 2000).

A problem with Hammersley’s argument is that it assumes that there is *one* critical approach and that this approach is more or less static. However, reading the literature of critical, feminist and disability research, it becomes apparent that these are not clear-cut approaches and that the boundaries between and amongst them are not distinct.

What brings these approaches together is that they share common assumptions about the nature and purpose of the knowledge they produce. This is acknowledged within each of these approaches; for example, many feminist writers are using feminism in plural in order to make explicit that there are different feminist epistemologies and therefore a number of feminisms (see for instance Weiner, 1994; Stanley and Wise, 1993; Gunew, 1990; Ramazanoglu, 1989).

Some of the most passionate debates¹⁸ within and amongst these approaches, such as the debate about the role of methodology and the qualitative/quantitative

¹⁸ The following footnotes do not attempt to give a complete overview of these debates but rather some indications about their content.

dichotomy¹⁹, the concept of 'voice' and 'empowerment'²⁰, and the debate around post-structuralist and post-modern theories²¹, can be read in this way. By engaging in these and other debates researchers are constantly 'critical' of their theories and methodologies, and of their role in producing knowledge.

Hence, what is called in this study 'inclusive methodology' requires that researchers make explicit the assumptions underlining their research in relation to the knowledge they produce. In doing so theory and methodology come together to construct an account of both the topic and the research process. All decisions taken throughout the research affect what constitutes the study/text at the end. As Smyth and Shacklock (1998) argue:

The interest is to engage in a constant questioning and building up of theory and interpretations through repeated ongoing analysis until a coherent alternative reconstruction of the account is created.

(Smyth and Shacklock, 1998, p. 4)

In the rest of this chapter disability research is used as an example to explore further how the production of knowledge is seen in this study. Although this

¹⁹ From a feminist perspective, this debate was centred on how women's experiences and voices have been distorted or silenced in traditional social research (see for instance, Lloyd, 1995; Mies, 1993; Gelsthorpe, 1992; Roberts, 1990) and which methodologies/methods are appropriate in making 'the personal political' (Lather, 1995). Qualitative methodologies have been considered more appropriate to achieve these aims. Feminist researchers challenged this new 'orthodoxy' of qualitative research and have developed feminist quantitative methodologies (see for instance, Epsein Jayaratne and Stewark, 1995; Maynard, 1995; Kelly et al., 1994; Epstein Jayaratne, 1993; Oakley, 1990).

²⁰ Feminist researchers also challenged the processes of traditional qualitative methods, which distance the researcher from the participants (Finch, 1994; Oakley, 1981). Feminist researchers, as well as critical (see Giroux, 1983) and disability researchers perceive research as aiming to empower the participants of the research, and they are conscious of the power relationships of the research process (Fine, 1994; Borland, 1991; DeVault, 1990).

For a critique of the 'voice discourse' see Moore and Muller, 1999, Troyna, 1994.

²¹ A central issue in this debate is whether these theories are counter-productive in reaching the social change that this paradigm of research aims to achieve. For a critique of these theories see Cole and Hill, 1995; Kenway, 1995; Skeggs, 1991, and for how these theories can be incorporated in feminist research see, Griffiths, 1995; Kenway et al., 1994; Cain, 1993; Barrett, 1992.

study is not a 'disability study' since it does not focus specifically on disability, it is about inclusion, which is central in disability research. Two central issues in disability research are used to discuss some of the decisions taken in this study. This discussion does not try to present what an inclusive methodology is, but rather the elusiveness of such a methodology. It is about the uneasiness, uncertainty, and contradictions that are integral in each decision taken during the research process.

Defining difference: theoretical implications

Disabilities Studies emerged in a period in which disabled people, individually and collectively (Barnes and Oliver, 1995; Oliver and Barnes, 1991) challenged their position in society and the existing models that perceived disability as a 'personal tragedy' (see Oliver, 1990; Brisenden, 1986). In that respect Disability Studies as an academic field cannot be seen separately from the Disability social movement, the historical period and locality in which it emerged, and as with the Feminist, Black and Post-Colonial fields of study, it is a political one (for a discussion of Disabilities Studies see, Barnes et al. 1999; Barton and Oliver, 1997).

A central debate in Disabilities Studies is between what Oliver (1996) calls the 'social model of disability' and the 'social model of impairment' (for a different typology see, Priestley, 1998). For Oliver (1996) the social model of disability "does not deny the problem of disability but locates it squarely within society" (p.

32) (see also Oliver, 1990; Abberley, 1987). Oliver argues that the social model of disability

...is not a social theory of disability and it cannot do the work of social theory. Secondly, because it cannot explain everything, we should neither expose its inadequacies, which are more a product of the way we use it, nor abandon it before its usefulness has been fully exploited.
(Oliver, 1996, p.42)

He concludes: "Let's develop a social model of impairment to stand alongside a social model of disability" (p.42) (see also Oliver, 1996c).

However, without minimising the importance and prominence of the social model of disability, it can be argued that it was never the only perspective in Disabilities Studies. Other perspectives supporting a social model of impairment –or even of a model that brings impairment and disability together (Crow, 1996)-, and exploring the personal experiences of disabled people and the concept of 'difference' have been central in the field. For instance Begun (1992), Campling (1981), and Morris (1995; 1993a; 1993b) explore disability from a feminist perspective²² and others discuss the role of impairment in cultural constructions of disability (Allan, 1999; Corker and French, 1999; Hughes, 1999; Abberley, 1996). Furthermore, the position of people with learning disabilities in the Disability Movement and the 'inclusivity' of the social model is another area of debate (Aspis, 2002; Chappell et al., 2001).

Finding a balance between 'pluralism' and a strong common understanding within the field of Disability Studies is an on-going project (Shakespeare and Watson, 1997).

²² For other feminist work on disability see Transtadóttir and Johnson, 1998; Abu-Habib, 1997; Matthews and Thompson, 1993; Williams, 1993; Lonsdale, 1990.

How does this debate affect this study? This study is about inclusion and exclusion in schools. At no point in this text has the study been described as a disability study (or as a feminist or critical one). Inclusion and exclusion have been defined in relation to ‘*difference*’ and in turn difference has been defined as encompassing special needs/disability, gender, race, class, religion and culture amongst others. This definition of ‘difference’ is informed from the social model of disability since it perceives difference as socially constructed and defined. In this context difference is defined as the actual and perceived attributes and characteristics of individuals and groups that affect –and in some cases even determine- how individual/groups are seen in relation to an assumed ‘normal’ and/or ‘dominant’ in society.

The aim of the study is to explore how structures, practices, attitudes and perceptions are defined and interpreted as inclusive/exclusive by the participants in educational settings and how these interpretations are influenced by (and in their turn influence) the socio-economic, political and cultural context in which they take place. In this respect, difference is both ‘real’ and ‘contested’. It is real because it constitutes part of the struggle for participation and inclusion, and it is contested because its meaning can change as part of this struggle.

However, this conceptualisation of inclusion/exclusion can be problematic because it defines ‘inclusion/exclusion’ and ‘difference’ as generic terms and it may diminish the significance of them for specific groups. In other words, by trying to present an ‘inclusive’ conceptualisation of inclusion/exclusion, there is the danger of arguing that everybody is to some extent ‘oppressed’ and

‘excluded’, and therefore trivialise the exclusion that specific groups encounter in educational settings.

On the other side of the same coin, there is the labelling potential of research that can reproduce labels and perceptions of difference that are oppressive. Moore, Beazley and Maelzer (1998) argue that:

As soon as the decision is made to focus on disabled children the risk of pathologizing children with impairments comes to the fore. Arguably, the intention to classify a child as disabled launches the pathologization process, but in order to operationalize a project, we do, of course, need to select children to study. This means that researchers immediately find themselves involved in both labelling and categorizing children, and in rekindling debates about inclusion vs. exclusion, through the process of selection.

(Moore, Beazley and Maelzer, 1998, p. 73)

They continue that researchers should make clear whether and which definitions and labels they are using in their research and how these definitions are affected by the interpersonal and institutional power relations that affect the research – through the research context.

My personal decision has been to avoid, as far as possible, using labels of disability –and of difference in general- in selecting schools and individuals to participate in this study. This is also compatible with the comparative framework of the study that claims that the comparability of ‘difference’ cannot be taken for granted as having the same meaning in different contexts.

Thus the ‘reality’ of the English school (where specific policies and practices for students with ‘special needs’ –and for other groups- are present) and the Greek school (where a common provision is perceived as appropriate and adequate for the majority of students) is seen as ‘representative’ and ‘meaningful’ in their respective contexts. It was decided to avoid finding ‘comparable’ schools with

similar policies, because it would have meant that in each context such schools would have been 'exceptional'.

In the same way, the composition of the school population was not a criterion for selection or of sampling equivalence (see Chapter Eight for a description of the schools). This does not imply a complete lack of sampling decisions. For example all schools are 'urban' schools and in the English school the three years of the lower school were selected as 'corresponding' to the three years of the Greek compulsory secondary education.

Booth et al. (1998) discuss a similar point in relation to the selection of a school for inclusive research, reporting that:

At first, we differed about whether selecting a school that included a group of students who had previously attended special schools was an advantage because it demonstrated a concern of the school with inclusive education, or a disadvantage because it might distract us from examining critically inclusion and exclusion at the school and the processes of inclusion and exclusion affecting all students.

(Booth et al., 1998, p. 194)

How decisions about difference are translated into practice is also important. Since research takes place in specific contexts and aims to explore these contexts, it is not possible to ignore the power relations and definitions used in them, and the way in which difference is defined. For research studies like this, that aim to explore the definitions and constructions used, engaging with them is essential. At the same time, engaging with existing/dominant constructions of difference may legitimise them, and may restrict the possibilities for alternative constructions.

To give an example of the ways that the context has impacted on the research; when I submitted the research proposal for gaining access in Greece, an issue was whether the application should be sent to the 'Special Needs Department' or the 'Secondary Education Department' of the Ministry of Education. The former is responsible only for Special schools and Special classes and therefore could not be involved in permitting access in mainstream schools. When I submitted it on the latter there was confusion since the research was about 'ένταξη' (see Chapter Two for discussion of the term) and therefore about 'special education and students with special education needs', a responsibility of the Special Education Department.

This is not only a bureaucratic issue, reflecting how the fragmentation existing at the higher level of the Ministry of Education affects the conceptualisation of inclusion, but it was also evident in mainstream schools where it contradicts the legislative framework, and has implications about which children are considered to be 'eligible' for mainstream education. In the English context, as I have argued in the previous chapter, my role in the school (working closely with the special needs team and 'helping' in lessons) influenced how the research was understood.

When dominant constructions of difference were challenged during the research practice, there was the possibility of misunderstanding and conflict. The reasons for interviewing almost randomly selected students in the schools, regardless more or less of their 'special needs', 'ability' or 'behaviour', were not easily apparent to the different gatekeepers who interpreted a study on inclusion in different ways. 'Misunderstanding' was more common than conflict. In general

my sampling criteria (or lack of them) were 'accepted' from the different gatekeepers, but this meant a degree of disconnection of the research from its topic of inclusion/ένταξη.

Finally, as a researcher I brought to the field my own assumptions, definitions, and 'labels'. These have been informed by my previous experiences, assumptions and ideological beliefs in a number of different roles (e.g. student, teacher, researcher).

To give an example from the research, when I started the fieldwork in the English school I met the Year Seven and Eight forms knowing which students were on the special needs register, for what reason and at which stage. Throughout the fieldwork a part of me was questioning whether the majority (but not all) of these students really 'had' these –or any- special needs. When a Year-Nine form was later added to the sample, I avoided checking the special needs register for the first two weeks of observation and participation in this class in order to explore how 'not knowing' affected my understanding.

To some extent my professional training as a teacher in a specific educational, ideological and political context influenced my understanding of what may be seen as 'normal' in a mainstream classroom. In my (Greek) professional-cultural language some of the students that in the English school were perceived as having 'moderate learning difficulties', 'emotional and behavioural difficulties' or 'specific learning difficulties', would have been perceived as 'simply' having 'gaps' in their school learning, having a 'bad' (or anti-) school attitude, coming from a socio-economic, or cultural background that may relate to different ways

of learning and value different types of knowledge than the ones provided in schools, and so on.

Although none of the above may give a 'fixed' label to the students concerned, they still compare students with something defined as 'normal', and perceive them as deviating from it and as having a 'problem' according to an individualistic model. In addition, the rationale behind different 'labelling' approaches –both as concepts of description and differentiation and as practices– are cultural, historical, and socio-economic. What is considered 'normal' in schools is related to the overall question of what the aim of education is in a specific context. 'Labelling' is acknowledgement –acknowledgement of 'difference' and/or 'need' that has to be catered for. As it will be argued in later chapters, 'soft' labelling processes –like the one used in the Greek educational system– 'justify' (individual) failure, without the need for allocating resources or changing practice. In addition, these labelling processes take place in a specific socio-political and historical context in which 'differentiation' of provision is seen as problematic and as contradicting 'equal opportunities'.

Therefore, questioning one's use of different 'labels' –and of understanding of 'difference' in different roles, contexts, and situations– can give an insight into conceptualising how disability, and difference in general, is constructed in different contexts. In that respect, there is not only the issue of how the social model of disability and a (social) model of impairment can be brought together, but also to what extent these models can encompass and be enriched by the experiences of different cultures. Stone (1997) argues that

In short, caution is vital when a researcher moves across cultures with a theoretical guidebook that was written by and for another country, another people, another set of social, cultural and economic structures. In my opinion, this means that any outside theoretical or practical approach, the social model included, must be critically explored rather than reified.

(Stone, 1997, p. 224)

The above discussion has presented some of the problems in supporting and developing a discourse of knowledge construction that defines and researches inclusion/exclusion in a way that promotes a generic understanding of 'difference'. Trying to challenge my own assumptions, as well as the assumptions that underpin the 'reality' of the research contexts was a difficult experience. Robinson (1994) argues that being changed during the research is unsettling because there is no 'stasis' or 'stability' for providing reliability to descriptions. 'Understanding' however, does not mean 'accepting' or resolution of all conflict.

The role of the researcher: methodological implications

The second big debate within Disability Studies is concerned with the transformation of 'social and material relations of research production' (Zarb, 1992). This debate derives from a critique of traditional social research, conducted predominantly by able-bodied researchers, as oppressive (for a critique of specific studies, see for example, Steward et al, 1998; Newell, 1997; Abberley, 1992. See also Oliver, 1992; Booth, 1991; and Söder, 1989 for Special Educational Needs). Barnes (1996) argues that "there is no independent haven or middle ground when researching oppression; academics and researchers can only be with the oppressors or with the oppressed" (p. 110) (For 'replies' to Barnes's

article see Bury, 1996, and Shakespeare, 1996. For a discussion of approaches to disability research that do not follow the social model, see for instance, Clear, 1999, and Ballard, 1997). In this respect, a research project should be explicitly political promoting the struggle of disabled people for social change (Barnes, 2001).

Two models of research are found within this type of research: participatory and emancipatory research (for a discussion see Moore, Beazley and Maelzer, 1998; Barnes and Mercer, 1997, and more specifically about education and Special Educational Needs, Clough and Barton, 1995). Participatory research aims to challenge social divisions and the power relationship of researcher-researched, and give the participants of the research a 'voice'. This type of research has the "potential to empower the people about whom we write and with whom we research" (Atkinson and P. Shakespeare, 1993, p. 6. See also Kitchin, 2001; Chappell, 2000). Participatory research is seen as "compatible with the social model of disability but not dependent on it" (Finkelstein, 1999, p. 863) and as not *changing* the social and material relations of research.

This is the ultimate role and aim of emancipatory research. In emancipatory research the researcher devolves his/her control to disabled people throughout the research process including the stages of research design, collection of data, analysis and dissemination. As Stone and Priestley (1996) argue, the emancipatory model "requires full ownership of the means of research production –ownership by the research participants, not the researcher" (p. 709).

An aspect of emancipatory research is that it cannot really be defined. Oliver (1997) argues that:

The question of doing emancipatory research is a false one, rather the issue is the role of research in the process of emancipation. Inevitably this means that research can only be judged emancipatory after the event; one cannot 'do' emancipatory research (nor write methodology cookbooks on how to do it), one can only engage as a researcher with those seeking to emancipate themselves.

(Oliver, 1997, p. 25)

Almost all the 'traditional' criteria –with the exception of 'scientific objectivity' and the perception of researcher as 'expert'- of evaluating a research study (e.g. the role of the researcher, appropriate research questions, vigorous methodological design, in depth analysis, and so on) are used in emancipatory research. The point of reference, however, is not the research community or funding bodies, but the disabled people that are 'co-owners' of the study.

How does this debate relate to this study? The majority of the subjects/participants of this study are young people. Some of them are boys, some girls, some are labelled as having special educational needs, some are disabled, and some are from different ethnic and religious backgrounds. These young people belong to different social classes according to the classifications used in the countries where the research took place. In addition, interpretations of gender, class, race, ability, religion, and culture in the two contexts may differ, and finally, the views and interpretations of these young people about their school experiences are characterised by diversity.

The research study was conducted by me, an adult, able-bodied, middle-class, Greek woman, and in some cases my experiences and interpretations of 'education' were 'different' from those of the participants of the study. This raises four methodological questions:

- What gives me the ‘right’ to conduct research with these young people?
- To what extent can I understand their diverse experiences?
- What give me the right to make claims about their interpretations of inclusion/exclusion?
- Is it possible to construct a common political agenda from these diverse experiences?

These questions are slightly different from the ones asked in an emancipatory study. They are concerned with the researcher’s political and moral obligation when undertaking research, and the relevance of the research to the researched context. However, in these questions it is assumed that the researcher more or less ‘owns’ the research since he/she is the one taking most of the decisions about the study.

This study has not been designed as an emancipatory study. None of the students participating in the study –or any other student- was involved in the design of the study in an explicit way. Thus, the issues explored in this study may or may not be important for the students. Their school lives have not been changed due to the study, and generally students have had no ‘control’ over the study –following the emancipatory research definition given above. The same, more or less, applies to the teachers participating in the study (e.g. only two people in the English school participated in the process of designing the interview questions and in Greece this happened at the level of the Pedagogic Institute).

It was a conscious decision not to see and design the study as an emancipatory research. This study was developed from my previous research experience. My most recent research experience was of doing a 'participatory' research with disabled students in Greek Universities as part of my Masters Degree. Although that study was located within the education system (higher education), the participants in the study were approached through friends and word of mouth. In that study a number of methods/techniques were used for collecting the data –e.g. individual and pair interviews, use of interpreter, tape-recording or note keeping depending on the preferences of the disabled students. In addition the interviews were very open –based loosely on a life-history approach- including a number of 'topics' rather than questions. Finally, some students took up the offer to read and comment on the transcribed interviews, and students decided whether to use their real names or pseudonyms in the final text (Spandagou, 1999).

In this research process I learned a lot about the possibilities and the difficulties of participatory research as well as about myself as a researcher and what this 'role' means to me. I found out that living and studying –more or less by choice- in a different country and reporting back research conducted in my own country raised for me –as a researcher- a number of issues about the ways that educational systems or groups of individuals are presented in this process (see also Chapter Two). What I found in the Greek literature –designed to be read within and outside Greece- was that there is almost always an implicit (and sometimes) explicit comparison with other (most of the times non-defined) educational systems, in which the Greek educational system is presented as less than 'successful' (independently of how 'success' was defined).

Presenting the experiences of the disabled students that participated in that study in this kind of implicit comparative framework, I believed that it would have been disempowering, since their experiences could form simple testaments of the comparative framework²³. Trying to find alternative ways of presenting experience in different social contexts was a question that I felt that I wanted to explore further. Finkelstein (1999) poses the question

Is the social model of disability a tool for focusing a microscope on the inner workings of the disabling society or merely a frame holding a magnifying glass for exaggerating the social experiences of disabled people living in the disabling society?

(Finkelstein, 1999, p. 861)

Thus the main theoretical and methodological question when I started designing this study was whether it is possible to make comparisons without assuming that one state of affairs (in this case an educational system) is 'better' but rather by exploring what assumptions underpin the comparisons made.

Is this theoretical question important for disabled, minority, or any other students in schools? Is it going to make any difference to their lives? Is it an important question to be explored? I don't really know, but I consider this question to be a political one, questioning the ways that success and failure, discrimination and

²³ An example of the implications of the implicit comparative framework is the following. Pasmazoglou (sic) (1992) referring to Greek Higher education (see also Pasmazoglu, 1994) argues that

What is more to the point is that with no effective criteria and models for evaluating teaching staff, undergraduates and faculty competence, with no institutionalized research or really structured postgraduate courses, with professors –considering, of necessity or not, their jobs as subsidiary –and 'undergraduates' as a rule (70-90 per cent) never seen in class, it is doubtful if one can really speak of a 'university' at all. To be even more precise, within the European context, most of the major issues in the ongoing debate on university and/or higher education, irrespective of its content and orientation, are non-issues in Greece.

(Pasmazoglou, 1992, p. 23)

The everyday struggle of disabled students for integration and knowledge in Greek universities is almost 'refuted' in such a context and becomes a non-struggle. The issue is not to question the validity of the claims of the above extract; it rather is to question the way that these claims are validated within an implicit framework.

oppression and ultimately possibilities for change are constrained by the values and assumptions that underline 'comparisons' within and outside educational systems.

At a more general level, I am to some extent ambivalent about emancipatory research. My uneasiness in relation to some of the assumptions of emancipatory research centred in the way that both research, politics, and the 'self' are defined in relation to a specific attribute, that of disability. In a simplistic way the 'self' – of the researcher and participants in the research- are perceived either as 'oppressed' or 'oppressor'. When disability is located in the wider context of 'difference', being 'oppressed' also can have 'quantitative' differences, with groups making claims of 'dual' or 'simultaneous' oppression.

I have been asked a few times the questions: 'what gives me the right to do research with disabled children or children with special needs?' or 'how do I see my role as an able-bodied researcher?' mainly by able-bodied academics. I find both these questions problematic because they assume an absence of 'oppression', and oppression is essentialised, and it is perceived as demonstrable, and related to specific 'personal' characteristics. Stanley and Wise (1993) argue that

Our view is that there are *no* foundational grounds for judging the *a priori* superiority of the epistemologies of the oppressed, nor of any one group of the oppressed, in relation to the production of 'knowledge' and the settling of its problematics, other than by comparing and judging the ontological bases of these epistemologies; and such a comparison and judgement is, as we have noted, ethically objectionable.

(Stanley and Wise, 1993, pp. 227-228)

They continue that there are however, 'moral and political' grounds for accepting a specific epistemology as 'preferable', according to specific ontological experiences. Throughout the research and especially in writing this text I was considering whether it was necessary to revise the description of myself as 'an adult, able-bodied, middle-class, Greek, woman' and uncover my personal experiences of 'oppression', if any. Although this may have been both interesting and relevant to the research –by making the personal political- it does not justify undertaking this research or prove that I am a 'good researcher', and of course it does not give me a better ontological standpoint to understand young people's diverse experiences. In this text I chose to 'silence' my personal experience. Large parts of this text are written from my position as a 'researcher' and the 'self' is limited more or less to that role. I am still uneasy about this decision because it distances the 'self' from the text. Hopefully, however, my ontological and theoretical position and the political significance of the study have been part of the research praxis and are evident in this text.

In addition 'being a researcher' is a complex position/role. In the emancipatory model, it is assumed that the researcher is in a relative position of 'power' and it is necessary to devolve this power to the participants of the study. Although this is mostly the case, the dynamics of the researcher's 'power' are complex and dependent on the situation. The previous chapter discussed how the experience of fieldwork could be perceived as a struggle –a struggle for knowledge and power. 'Power' is always evident in the research process –but it is not one-directional, or one-dimensional. The extract at the beginning of this chapter is an example of the

researcher's perceived power. The boy in that interview assumed that I –in my role as a researcher- had the 'power' to talk to the head-teacher, to initiate change²⁴.

On the other hand, I was seeing myself –and other participants saw me in the same way- more in a position of relative disempowerment. A large part of my disempowerment was due to the structures and constraints of the educational institutions in which the research took place (see David et al., 2001).

It is at the empirical stage of the research study that the researcher's 'power' position in constructing knowledge is contested by the participants in the study.

On the other hand, at the writing stage the researcher can exercise his/her 'power' to a greater extent. In this stage the researcher has control over the data – including others people's actions, words and ideas- and the text. How to exercise this 'power' becomes the political and moral responsibility of the researcher.

Denzin (1997) discussing ethnographic texts as 'moral tales', argues that:

The ethnographer's tale is always allegorical, a symbolic tale, and a parable that is not just a record of human experience. This tale is a means of experience and a method of empowerment for the readers.

(Denzin, 1997, p. 284)

The question then is not so much about how research can change the world, but how it can keep alive the possibilities for change.

²⁴ It is very important to note that not all students assumed that the researcher's role is a 'powerful' role. For some students in the English school, my role was closer to a 'student-teacher' one. In that way, I needed their cooperation, and even their 'help' to write my 'report'. The same was the case in Greece, as well, where students perceived me as a 'student' that they could help. Other students emphasised the 'teacher' role and only a minority –especially in the Greek school- emphasised the researcher's role (as a powerful one).

Bringing the two debates together: research as practice

In order to bring the two debates together, I am going to use an example from the research to give an indication of how knowledge as social interaction was produced during the research practice. In the first Greek school, one of the first interviews conducted was with a girl that her teacher described as being the 'best student' in the class and the 'register-keeper'²⁵. I started the interview by asking about parental consent and her consent and explaining the research. Then I moved to test the tape-recorder and I asked her to say her name and surname and date of birth. Then I played back the tape to test the quality of recording and familiarise the students with the equipment. That was how most interviews started in this research. Pre-occupied with the tape-recorder, I did not hear her surname and I asked her to repeat it. She did so and made a comment about having an unusual surname. After that we continued with the interview.

A couple of interviews later, I interviewed another girl from the same class. I had noticed her before because she was very eager to participate in the research. In fact, when I gave out the letters for parental consent to the class, she asked me what would happen if parents do not wish the students to participate in the study, but the students themselves want to. From the minimum contact that I had prior to the interview with her, I got the impression that she had some interesting views about school.

During the interview, when I asked her if she ever had any problems with other students in the school, she said that she had had an argument with the girl that I mentioned before:

²⁵ In Greek schools the student in each form with the highest average grade is responsible for filling in the class register.

I.S: Did you argue about something specific?

Girl: I despise Albanians. I hate them. She, without a reason, recorded me as absent, even though I was present. Then we had to argue, because I was present and she put me down as absent. Twice.

I.S.: What has that to do with Albanians?

Girl: She is Albanian and this makes it worse for me.

I.S.: The girl who is register-keeper now?

Girl: Yes. Isn't it obvious? She is. Unfortunately. And we are in the same class since year six [last year of primary school] and we argue all the time.

I.S: Do you have problem with Albanian people in general or with specific ones?

Girl: In general.

I.S: Did you talk to any of your teachers about the argument?

Girl: Yes, she [the register-keeper] told the head-teacher but he didn't say anything, really.

(Girl, Year C', 1st Greek School)

Starting from the first interview the girl did not mention that she was Albanian. The only possible indication was that her surname was 'unusual' (as she said), which I did not notice at the time and I considered significant only after the event.

A research aim of this study was to explore how young people present themselves as 'students' in the interview context and which parts of their 'student identity' and school 'reality' they consider important, having the 'freedom' to omit or avoid discussions of aspects that they did not want to. The interview questions were presented in such a way that specific school processes (such as discipline and rules) and elements (lessons, break time) were discussed and the students could position themselves towards them, and give their interpretations of them (see next chapter). In addition, the interview questions were constructed in such a way that the students could present themselves and their 'student identities' in any way that they wanted. Therefore, even if I knew that this girl was Albanian

from other sources, I would not have asked her about that unless she mentioned it first.

This approach does not deny 'difference' and the importance of it in the experiences of students. Although the perceived and actual differences of the students are central in the study, it is not taken for granted that the researcher has the 'right' to explore these differences, when the participants are not prepared to do so. The researcher should not reproduce the differentiated processes used by schools and by the participants in them, when this is possible. In the same way that I (the researcher) have had the right to decide what to disclose or not in the text about myself, the interviews allowed the students to make similar decisions.

To return to the above incident, I have no way of knowing why the first girl did not mention her ethnicity in the interview. It may be that for her this was not an important part of her student identity in the interview context, or it was an act of 'assimilation'. She might even assume that I knew or 'guessed' her ethnic background²⁶. It is interesting that in the second interview, the girl questioned my failure to detect that the first interviewee was Albanian. When I was trying to make sense of this incident, I started doubting my 'observation' skills, my ability to detect 'difference'. On the other hand, the question is whose criteria/assumptions are used in defining 'difference' and how it becomes observable.

A further issue is whether all the unanswered questions and ambiguities in the above interview affect the 'validity' of it. If the 'missing' information is seen

²⁶ The contrast between the fieldwork in the English school where interviews took place after a long period of fieldwork and in the Greek schools, where prior to interviews contact was at best minimal, is obvious. Both cases have advantages and disadvantages.

simply as data, then what is missing is important (see next chapter). On the other hand, if the focus is on the interview as a social interaction, then it is more important that this girl had the opportunity to create her own ‘story’, and to have –to some extent- control over the interview process.

In the second interview, the girl made some remarks that I perceived as explicitly ‘racist’. Over the last ten years or so, Greek schools have changed from almost mono-cultural with a relatively homogenous ethnic and religious body of students and teachers, to ones where students (but not teachers) from different ethnic and religious backgrounds are represented.

Most of my previous experiences were of ‘homogenous’ Greek educational settings, I expected however that the ‘racist tensions’ that are evident in Greek society, would be also found in schools, possibly affecting inclusion/exclusion. However, I did not expect overtly ‘racist’ comments and in fact this was the only interview in which this happened. As it is clear from the above extract, I did not challenge these remarks, or explore them further. I do not know why this girl “hates Albanians”, what that means for her in her everyday school life and how this may affect the school lives of other students.

This is not one of the countless missed opportunities of asking an interesting question in an interview. The reason for not asking these questions was because I wanted to protect myself –more than the interviewee- from discussing something that at that given point I found a difficult and sensitive topic. I made the conscious decision during the interview that no matter how flippant her

comments were or how trivial or serious the reasons for her 'hating Albanians', I would not ask further.

There are a number of possible reasons for that. It might be because I had not been long in the school, or because I did not know the students well, or because I was taken by surprise since my first impression of that girl had not prepared me for this topic. At a more practical level, this was an interview that was not going as I had expected it to go. The interview started in the staff-room, as that was the only empty room at that time. We had to move out during the interview when a teacher came in. We moved to the office next to the head teacher's office. The two offices were divided by a panel-wall and I was conscious that people in the next office could hear what was being said. I was also worried that the background noise would affect the quality of the recording. Finally, I was concerned that the lack of space, which appeared to be an ongoing issue, would affect the co-operation of the head-teacher and teachers and even be used as an excuse to terminate the research. All the above may have affected my decision not to ask further questions.

With this example I tried to illustrate how research practice 'happens'. The knowledge construction framework defines the content of research, and the practice of research is where this framework –its possibilities and limits- is 'tested'. As Schratz and Walker (1992) argue "theory extends our capacity to see alternatives, reminding us of the lost opportunities we create with every action we take and every word we speak" (p. 125).

This is neither a straightforward process nor a pre-defined one. In this context, exploring 'difference' is not an easy or a comfortable task and it space is needed for tensions and contradictions to be acknowledged and reflected upon. The two girls mentioned above cannot be seen simply as, on the one hand, someone who did not report her ethnic background, and on the other, someone who made 'racist' remarks. In their interviews and representations of themselves as students, a number of other themes in respect of their identities as students were presented. The role of the researcher is to bring as many as possible of them into the discussion and to allow for contradictions, tensions and omissions to be part of the texts (see Hollway, 1989, p. 43). In addition, the role of researcher in constructing –as a participant in the process of interviews- the final accounts of the interviews, has to be recognised.

What then is an inclusive methodology?

A possible criticism of the above presentation may be that there was no apparent reason for discussing this study in relation to Disability Studies since it is neither a disability nor an emancipatory study. This misses exactly the point of that presentation. This chapter aimed to present how the study developed in the context of Disability Studies, which has been extremely influential in defining what the study is about. The paradigm described at the beginning of the chapter is the framework in which the study can be read, made sense of, and criticised. Some of the decisions discussed above may be 'unimportant' or have a different meaning in a different framework of understanding inclusion/exclusion. For

instance, in research following a psychological/educational framework, the issues of selecting individuals for the research and that of 'labelling' will probably be defined and understood in a different way.

Engaging with the issues discussed above has been a long-term process. The decision about whether or not to do emancipatory research was taken early on in the study. However, the ways in which this decision affected this study and the ways in which the study still relates to the emancipatory model of research are questions that are still part of the methodology.

An inclusive methodology then is a methodology in which the assumptions and values underpinning the research and selection of methodology are explicit and open to reflection, debate and criticism. This methodology is not presented *a priori* as appropriate for the particular topic, or as an orthodoxy that can produce better knowledge. On the contrary, the influence of the methodology on the data produced, the analysis, and the final representation as well as the possible limitations of the methodology, are acknowledged. This chapter gives an indication of the kind of information/data this study produced, how it can be used, and its limitations. Overall, an inclusive methodology is not a 'neutral' one. It is a methodology that explores the social world in relation to a specific epistemological understanding of what social reality is.

An inclusive methodology is not only about the research study as it is. It is also about the development of that study, about all the things that never became part of the study, and even about the possible alternative studies in the same topic. An

inclusive methodology is about accepting that research is never final and never totally 'right'.

Inclusive research questions the assumption that 'inclusivity' can be imposed on a social context. The 'good intentions' of the researcher in designing a study are not sufficient. What is important is a common understanding and dialogue about the meaning of the study amongst participants during the research interaction. The inclusivity of the study is contested during the research interaction.

To give an example, in this study a methodology that allowed students to express their views about their school experiences and student identity was used. It was made clear to students that they could challenge the questions, interpret them in a number of ways and withdraw their consent at any point. A large number of students understood their participation in the research in these terms. Some others, however, felt that they had to do the interview in the same way that they have to do a number of things in their everyday life in schools, or as a way out of a lesson. Some students may have considered the interview situation an 'empowering' experience giving them the opportunity to express their views. Some students may have found it a 'boring' experience or even an uncomfortable one. The students' diverse definitions and understandings of the methodology and research process have informed the analysis of the data, and the critical reflection on the methodology. Thus, the researcher is not seen as the only person having 'ownership' of the methodology. The influence of others such as previous researchers or gatekeepers, and especially the participants in the research process, is acknowledged.

In addition, trying to include all these different aspects of the methodology and accepting contradictions, conflict and unresolved decisions means that the methodology is presented as 'honestly' as possible. This does not make the study 'weaker'. Since research is seen as 'less than perfect' then the issue is not the extent of 'success' or 'perfection' of a study, but the extent that it achieves consistency in its decisions and aims. Conflicts, contradictions, unsolved methodological dilemmas, practical problems, and uncertainty are part of it. They are seen as an integral part of the research process and of the generation of knowledge, and as 'critical incidents', or turning points' that can lead to a better understanding of the assumptions underlying the theoretical conceptualisation and methodological decisions of the research.

Finally, returning to the conceptualisation of inclusion, it is important to acknowledge that the struggle for greater participation by individual students and groups of students in schools may create tensions and contradictions. It is the responsibility of researchers to explore the implications of these tensions and contradictions for a political agenda for change (Giroux, 1984).

Conclusion: was this study successful in following an inclusive methodology?

One way to locate this study in relation to the notion of the elusiveness of an inclusive methodology is to try to see the extent that this study was able to apply an 'inclusive methodology'. On the one hand, to use an inclusive methodology

has been one of the aims of the study. This aim cannot be seen in isolation from the other aims of the study and their methodological implications. To give an example, in the previous chapter the tension between comparative and qualitative methodologies was discussed. This tension has had implications for the nature (and the extent) to which the methodology could become 'inclusive'. For instance, only one interview was conducted with each of the students (in all three schools and with teachers in the English schools) due to practical and time constraints derived from the design of the study and the restrictions posed from the contexts of the research. This meant that the opportunity to revisit their narrative was not given to students/teachers. It is not possible to know how many of the students/teachers would have wanted and used this option and what it would have added to the data. I do not know also whether a second interview would have made the methodology more 'inclusive'.

In conclusion, this chapter has tried to engage with the concept of methodological 'inclusivity'. An inclusive methodology affects all decisions of the study, from the selection and conceptualisation of the topic to the social interaction in the field and the writing of the text. Thus, the research study relates to a specific knowledge construction discourse. In this chapter different 'decisions' were discussed; decisions were taken outside and inside the field; some of them were taken solely by the researcher, in some others were also involved; and in some cases, the significance of the 'decision' was not apparent at the time.

This chapter aimed to explore how research decisions may be inclusive, exclusive, or both at the same time. However, inclusive methodology

acknowledges that the research is never final but its 'inclusivity' can be seen in its totality only after the end of the research. For that reason, inclusive research is elusive, ever changing and open to new definitions.

Chapter Seven

The Unassuming Aspect of Methodology: Mapping the Journey from the Field to the Data and finally to the Text

Introduction: the unassuming aspect of methodology

Wolcott (1992) argues that the techniques of qualitative research can be summed up as the activities of ‘watching’, ‘asking’, and ‘reviewing’, which correspond to these of ‘observing’, ‘interviewing’, and ‘archival research’ and that

These techniques are so basic –and so unassuming- that when we employ any of them as our sole research strategy we feel compelled to gussy it up in more esoteric language.

(Wolcott, 1992, p. 19)

In the previous two chapters an attempt was made to present the methodology in its complexity and messiness. This presentation has also been ‘messy’, introducing simultaneously a number of issues, giving fragmented glances of information, data and events and leaving unanswered questions. Schratz and Walker (1995) argue in favour of academic writing

..turning the text into a display; developing narrative rather than narration; allowing interaction among perspectives, and presenting material rich enough to bear re-analysis in different ways.

(Schatz and Walker, 1995, p. 136)

This type of writing both allows and requires the reader to ‘test’ the validity of the text against his/her experiences and to question “*blind spots* in the researcher’s conceptualisation” (p. 136). In that sense, this presentation has been based on a conceptualisation of methodology and research study as a complex, messy, selective, and contradictory process. One of the aims of this type of presentation is to demystify research as a ‘scientific’ endeavour and the way it produces knowledge. In describing research either in contrast or in relation to its ‘scientific’ attributes, it is easy to forget that qualitative research is mainly an ‘unassuming’ everyday social activity; an activity that tries to make sense of the social world by doing what people do in the social world.

The assumed conflict between the scientific and unassuming aspects of methodology will be discussed in this chapter in relation to the interconnectedness of research methods and analysis in this study. As far as the research methods are concerned, there is the epistemological question of whether and to what extent research should/can be ‘natural’, ‘imitate’ life, or be a ‘distinct’ expression of natural activities. On the one hand, qualitative methods become more ‘scientific’ when they are applied in as controlled and systematic manner as possible, thus losing their ‘resemblance’ to natural activities. On the other hand, the more research methods are *like* social life, the more authentic they are –and consequently the representations produced are seen as more authentic.

The different ways of defining interviews –e.g. as an artificial social event, a power-relation situation, an informal conversation, or a social interaction (see

Holstein and Gubrium, 1995, Bryman, 1988; Silverman, 1985)- and the essence of participant observations –e.g. the extent, intensity, and content of the experience of acting as a participant/researcher in a social context (Adler and Adler, 1987)- are two of the most discussed examples.

Sometimes this is presented as a methodological problem. However, this is firstly and mostly an epistemological issue, since, as argued in the previous two chapters, how methods are understood and applied relate to how the social world is perceived and the knowledge that they produce about the social world.

At a more general level, many of the current debates in research in education can be seen in the context of a ‘crisis discourse’. In this discourse research is presented as being in a crisis, which is acute, original in context and distinct from previous ones²⁷. Denzin (1997) calls this the ‘triple crisis of representation, legitimisation, and praxis’ (p. 3). In the context of this crisis discourse, how methods are perceived is crucial because it defines the ‘value’ of the knowledge produced by research.

Despite the different ways that the same methods may be defined and used, they have a common aim: to collect information/data to be analysed. It is common practice to present the process of analysis as a somewhat separate stage of research, in which the researcher, using more ‘scientific’ and exact methods (than

²⁷ This ‘crisis discourse’ relates to all aspects of the research process: the role and use of research (Gorard, 1999; Rappert, 1999), its quality (Atkinson, E. 2000; Hammersley, 1997; Hargreaves, 1996, Bassey, 1992) the role of theory (Rajagopalan, 1998; Thomas, 1997), its methods and outcomes (Pirrie, 2001; Torgerson and Torgerson, 2001; Davies, 1999, Hammersley, 1992), and so on.

the ones used in the field), analyses the data and constructs the outcome of research, the text.

The independent character of the analysis stage is the result of the dominance of the data in this process. The idea is that data, being independent from the field, the participants and the researcher, allows for the same (or almost the same) analysis by different researchers (see for example, Mohr et al., 2001 and Weston et al., 2001). Again this issue is presented as a methodological one, as it is argued in this chapter, it is mainly a theoretical one.

In other words, the journey from the field to the text is legitimated by the data collected. In doing so, data are separated from the lived experience of the field and become 'objects' containing knowledge that can be extracted through the process of analysis. Despite the centrality of data in the research process, data cannot stand alone. Data are 'pieces of a puzzle', as the metaphor goes, to be put together in the text in order to create a description of the reality studied. In that sense, data is suspended between being 'live' and being 'text'.

Accepting the unassuming character of research, it does not mean that it is not a highly complex and sophisticated activity. It means however that research is first of all a social activity that is constructed in the social world. As Freeman (2000) argues

Research is a social act that is itself shaped by social and cultural conventions. Although we seek access to information that we believe to be data and represent data in ways that we consider to be the telling of data, what we are really doing is making a social and historical statement of what are to be data.

(Freeman, 2000, p. 367)

Seeing research as a social activity means that researching research – understanding what researchers do- even when one is researching ones own practice, has the same limitations as researching any other social activity.

This chapter focuses on the unassuming character of research and discusses the research methods of the study –mainly observations and interviews. In this context, research methods are seen as inseparable from the data they produce. Furthermore, data construction/selection is seen as an analytical process. Analysis is perceived as the on-going process of re-defining the phenomena and concepts under research as part of conceptualising the ‘topic’ of study.

This process starts with the selection of the topic and (provisionally) ends at the final textual representation. The process of constantly theorising and analysing (as interrelated processes), results in the third aspect of methodology presented in Chapter Five, that of the simultaneously limiting and expanding character of methodology.

Watching

Homans (1965) argues, “no one just ‘sees’ human behaviour” (p. 13). The social world is available to be seen (Ball and Smith, 1992) but what researchers describe cannot always be seen (Hammersley, 1990). In this way, observation/perception as the root metaphor of qualitative research is problematic (Carspecken, 1996; Jenks, 1995) and as Jenks (1995) argues

Theory is modified by methodology and vision by scopic regimes, both, in their different ways, demanding a uniformity or (re)presentation in the form of data or image.

(Jenks, 1995, p. 11)

Thus, methodology, in its attempt to make ethnography more 'systematic' (Hymes, 1996), distances the research even more from the reality of seeing, perceiving, and observing because it transforms these from processes to textualised data (Holliday, 2000). This is problematic even at the most basic level because seeing, perceiving and observing are not mono-sensual processes; sight is not the only sense involved and sometimes sight is not even necessary²⁸.

Denzin (1997) refers to

...a more grounded, multi sensual, multi perspectual epistemology that does not privilege sight (vision) over the other senses, including sound, touch, and taste.

(Denzin, 1997, p. 36)

This does not mean simply to include descriptions of non-visual data in ethnographic texts. References to sounds, smells, textures and so on may give a more vivid 'picture', but it is still a textualised one. It entails presenting accounts which are constructed not through an all-seeing 'eye', but through a person that experiences and feels in a number of ways, acknowledging that all of these ways are 'limited'. In addition, a multi-sensual epistemology does not imply just finding alternative ways of doing 'observations'.

Observation can be defined as the act of being in a setting –independently of the degree of participation- with the aim of creating recollections of what happens at a specific moment. These recollections take place both in the present (when they happen) and in the future (when they become permanent recollections/data and are then incorporated into the research text). In that sense 'observation' does not end at the field or after field notes have been written. In addition, during the

²⁸ An example is writing down notes of non-verbal communication after a telephone interview.

process of observation –and for that matter of interviews and archival research- researchers ‘interpret’ through their feelings, senses and assumptions what it is in front of them, and thus the outcome of the process is already ‘analysed’.

In this research a number of different ways of observing were used²⁹. Some of them were differentiated by the *content* of observation, e.g. observing a specific child, or children in turn, a teacher, boys or girls, myself, the structure of a lesson. Some others were differentiated by the *means* of observation. For example in an English lesson the teacher asked me to specifically help a boy sitting at the front. This meant that I had no visual picture of what was going in most of the room. I tried in that lesson, week after week, while helping the same boy reading *Romeo and Juliet*, to ‘observe’ what was happening outside my range of vision. Being at the front desk is not a common place for an adult in a school context and it is not a textbook observation technique. ‘Not to be able to see’ for adults in a school can be an unsettling experience since ‘seeing’ is related to having ‘control’ over a situation. At the same time being in the same position as a lot of students, can give a different insight to these observations.

A further strategy was to observe without seeing, with closed eyes. In some lessons, hidden at the back of the classroom, I could close my eyes for very short periods of time. This allowed concentrating on sounds, noises, and speech³⁰. Usually participants in schools learn to switch off the background soundtrack; the noise in the corridor during break time, the fidgeting noises that students make in

²⁹ Most of the examples of observations refer to the fieldwork in the English school, since it was the setting most structured participation took place.

³⁰ Working as a special needs teacher in the integration/ ένταξη of a six-year-old blind girl was an important part of my ‘training’ as an observer. I need to thank her for teaching me how to perceive the world in different ways.

a lesson, or noises from the next-door class, and so on. This type of observation brings what is in the background to the foreground.

In addition, the lack of visual images gives a different quality to the talk and interactions that take place. A teacher, for example, pausing in order to decide which student to ask a question, 'sounds' different when you do not know where s/he is looking.

This type of observation does not create a pre-textual observation, where speech is separated from the overall situation and is perceived as being the 'data'. On the contrary, by observing without 'seeing'³¹ one becomes aware of how perception is constructed, how neither speech nor vision are the sole means of making sense of what happens.

The above ways of 'observing' were not systematic in any way; there was not a formal schedule of observations. Since in most lessons I was participating as a helper, the main body of observations was 'keeping an eye on what was happening while I was doing something different' or 'observing the immediate vicinity', and 'observing what I was doing as a participant'³². However, my role in the school also comprised long periods of 'inaction', periods of time in which

³¹ A different type of observation –especially in the English context was to 'switch off' and to perceive any speech as background noise. Initially this happened as the result of tiredness or boredom. Trying to take in all different conversations taking place at the same time, and remember as much as possible to record later needed a degree of concentration that I was not used to, as a non-English speaker/listener. Sometimes, both in classes and especially in staff-rooms, I stopped 'listening'. The more a competent listener I become the less I was 'switching off'.

³² Due to the fact that I started 'helping' in the class from my first day in the school, I found it difficult to introduce a notepad at a later stage. Students became accustomed to asking me for help at any time and I did not want to change that by keeping notes in the lessons. I did not see that as a problem since initially I needed all my concentration to understand what was happening. I accepted that I had to rely on my memory for writing down my notes after school. Although my ability in following conversations and remembering them *verbatim* improved during the fieldwork, I preferred to concentrate on the general meaning of a conversation/interaction rather than trying to recollect it word by word.

my position was closer to that of students than of teachers. In some cases I was doing what students do, learning and following the curriculum,³³ ‘misbehaving’ by talking to students during lessons, or even staring outside of the window.

Davies (1985) argues that one of the aims of ethnography is “not so much to uncover what things *are*, but to suggest what they are *not*” (p. 81). Most school ethnographies are about what is going on in schools, about describing the complex ways that schools as organisations work. In that sense, ethnography is about action, interaction, change and time progression (see Muncey and McQuillan, 1996). In the class context –where something is always happening- it is very easy to create the impression of a unique linear account of action, which is usually initiated and controlled by teachers. This account however may not include all the levels of ‘stasis’ and ‘parallel action’ that are also present. These are the levels when participants are ‘bored’ or ‘indifferent’, when they create different centres of action, or when they divert themselves from the main action.

Deciding what and how to observe demands an exploration of what is the meaning of observation –both as a process and as outcome. Constructing recollections of what happened, reconstructing different levels of action and stasis, using different ‘perceptive’ methods, is the way that ‘observations’ happened in this study. However, above all ‘observing’ was seen as a lived experience and therefore not only being comprised of images, sounds, and speech, but also of feelings.

³³ Early in the fieldwork (in the English school) I decided to keep the initial provisional timetable for the whole fieldwork. Although this meant that many aspects of the school life and of lessons was never observed, it gave the opportunity to follow the National Curriculum for nine months in the lessons observed. In addition, a stable timetable meant that everybody knew when to expect me in the school or in lessons. This gave stability to my presence in the school.

Understanding what observations entail was important in this study. On the other hand, how to manage the everyday experience of doing research was the main preoccupation during the fieldwork. Observations as well as interviews were not simply technical exercises in collecting data, but rather part of the experience of being in the field. The intense experience of doing research in its totality is the data and “it is recorded in memory, body and all senses” (Okely, 1994, p. 21). The observations and interviews that provide the field notes and the transcripts – the textual outcomes of research- cannot be separated from the experience of doing research.

In the same way, the analysis of the data in this study is not seen as a separate stage. On the contrary, ‘analysis’ is the process of making sense of what happens at every stage of the research. The ‘data’ of this study have not been constructed outside the research process. In a way, the argument is that the ‘data’ of the study do not give legitimacy to the research. Quite the reverse is the case; the theoretical/analytical context of the study creates the framework in which the data of the study become ‘meaningful’ interpretations of the context and the topic. The theoretical and analytical framework –throughout the research process- influences what constitutes ‘data’.

From watching to asking

In Chapter Two a number of research questions were presented, based on a conceptualisation of inclusion/exclusion as multi-levelled and multi-faceted

concepts and processes having different meanings in different contexts, within and outside the educational apparatus.

When I first entered the field –in the English school- I was looking for processes and practices that could be clearly described as inclusive/exclusive and recognised by the participants as such. Often researchers are advised not to enter the field as ‘tourists’ and at the same time to avoid ‘going native’ (Silverman, 1994; Atkinson, 1984). By expecting to find in the school specific, well-defined inclusive/exclusive processes, I was acting like a tourist looking out for ‘major attractions’ such as the curriculum, special educational policy, anti-bullying practices, and formal processes (disciplinary rules) of excluding students due to their behaviour. These processes do exist and are evident in schools; however, in order to understand their operation and significance in a specific context, it is necessary to understand their meaning for the participants in the details of their everyday life in this context.

While I was working with alternative interview schedules (four months into the fieldwork), I conducted an initial analysis of the field notes from observations³⁴ to see what kind of things I was recording and what to explore further with the interviews. To give an example of this process, the few minutes between lessons –when students and some members of staff moved from one classroom to

³⁴ For the first two months of the fieldwork in the English school I kept written notes (mainly in English). After that period I tape-recorded my notes (mainly in Greek). After Christmas –when the interviews started- I stopped the systematic field-noting and kept notes under a number of headings as well as significant/critical events. Systematic field noting refers to detailed chronological descriptions of lessons, break times, and staff room conversations. Fieldnotes were written outside the school and usually the same day that events happened.

In the periods of fieldwork in Greece I kept a research diary (in Greek) in which observation entries were included.

another- gave the opportunity for a number of activities that were recorded in the field notes. In a simplistic way these activities can be categorised as followed:

- *Activities in which verbal communication is prominent:* talking (in pairs, small groups), gossiping, calling names, making jokes, telling off, bullying, interacting (or avoidance of interaction) with members of staff, flirting, interacting with people outside the school [bb]³⁵.
- *Activities in which verbal communication is less prominent:* walking (with others or alone), running, playing, throwing litter or stones [bb], pushing, fighting, smoking [bb], walking up the path on the 'wrong side' [bb], walking off the path [bb], delaying.

This list of activities may seem helpful in highlighting what was happening, but it does not explain how and why it happened or how it was recorded. For instance, in the first weeks of fieldwork, I recorded all incidents that involved pushing, and the following are the sub-categories of this activity:

- *Types of pushing:* leaving/entering the class, in settling down time, on the stairs/corridors/doors/paths, intentional (targeting specific people) /unintentional, playful, pushing as a form of bullying, in the presence or not of members of staff, involving younger/older children, involving pairs/groups, gender differences.

³⁵ The English school was a multi-site school. Most of these activities took place both when students were walking between buildings and between classes of the same building. Activities marked [bb] were restricted almost exclusively to movements between buildings. However, from staff room conversations I knew that smoking was happening inside the buildings (in the toilets), but I never observed it.

- *Consequences of pushing*: none (most common), involvement of observers (students, member of staff) aiming at stopping it, other students joining the activity, argument, accident, participant send off to the 'duty room', formal action, fighting, crying.

In addition, I recorded my reactions as a participant in these activities. Taking 'pushing' again as an example, my reactions included: sense of danger (especially in incidents on stairs where the 'domino effect' was possible), discomfort due to close physical contact, tendency to intervene and at the same time a reluctance to intervene, tendency to 'protect' younger students, incident as a questioning of my authority as an (adult) participant in the school, laughing, ignoring, annoyance, research interest/curiosity.

Although I was recording these activities, I considered most of them as important mainly for understanding the context and only indirectly connected to inclusion/exclusion (e.g. when bullying was involved, disciplinary action was taken). By analysing my fieldwork notes, I realised, however, that these activities were far more related to inclusion/exclusion than I had first thought.

These activities were important for my own 'inclusion' in the context. By being present, observing, participating, taking decisions about them as an observer and as a researcher, and trying to understand and explain them, I was becoming a member of the school in a dual insider/outsider role (Carspecken, 1996). In addition by 'knowing' when to participate or not, intervene or not, judge the extent and severity of a specific activity, guess the reaction of participants, and accept and expect specific activities to occur or not in specific places and times, I

was going 'native'; I was gaining an intuitive knowledge and constructing an 'identity' that not only allowed me to function in the context, but also to see myself as part of the context, influenced/influencing the context and reacting appropriately in it.³⁶

Before I started the fieldwork, I took the decision that I was going to 'intervene' only in situations where there was a clear possibility of 'harm'. I perceived my role in the school as being as 'neutral' as possible, aiming at a level of 'detachment' and 'independence' from both students and staff. The aim was to create a 'researcher' role and space for me in the school. However, this was only partially possible. Deciding how to react on specific situations either following my own initiative or others' request made clear that in a school it is not possible to create neutral roles and that the complexity of relations between participants, their roles, positions and obligations influence the 'flexibility' of each role³⁷.

In addition, these activities are part of what school is. They define (and are defined by) time, space, roles, rules, everyday routine (or ruptures of it), identities, alliances, resistance, behaviour, relationships and so on. Students, teachers and visitors alike witness and participate in these activities within and

³⁶ If 'going native' is seen in relation to taking an 'insider's' role in a setting, then in educational research, researchers have –in theory- a 'choice' of what role to take/adopt. Usually, this role is an adult related role. Davies (1985) argues that 'going native' in educational research 'is a fraud' because of the age/outsider factor (p. 85). However, other researchers support a 'least-adult' role (Mandell, 1991, see also Epstein, 1998) or a non-authoritarian adult role (Corsaro, 1985; Corsaro and Eder, 1990), or a 'parental' research role (Adler and Adler, 1995) and Chang (1992) describes an 'almost student role'.

³⁷ My role differed from lesson to lesson and was perceived differently by different participants. In one lesson for instance I was covering (unofficially since I was not member of a union) for a support assistant for her to attend a weekly meeting. At the other extreme, in a science lesson I was doing mostly what the students did and the teacher included me in the questions/answers of the lesson.

outside lesson times, in and around the school. As will be argued in the next chapters 'inclusion/exclusion' is defined in the everyday activities of school routine and their symbolic significance for the participants in that context.

What to ask about

Trying to construct a one-off, twenty-minute semi-structured interview that could explore both formal and informal processes of inclusion/exclusion, allow students to present and discuss their students' identities, and at the same time be meaningful and comparable in both English and Greek schools, was doomed to failure. No interview schedule that I could produce would have been able to do all these things.

Therefore, instead of attempting to create an all-encompassing interview schedule, I decided to follow the opposite approach, an interview schedule with themes and topics, related and non-related, being meaningful in the context but at the same time being fragmented expressions of the meanings and reality of the context.

Ball (1981) argues that

The reality of a social institution as large and varied as a comprehensive school is far too complex and multi-faceted to be susceptible to complete or totally adequate presentation through the relatively crude and inexact conceptual mechanisms of sociology. [...] What is offered here is an approximation to reality [...].

(Ball, 1981, p. xviii)

In fact this research aims for even less. It aims to focus on specific concepts and practices of inclusion/exclusion. However, even the selection of these concepts

and practices was not straightforward. Selecting what concepts and practices to explore in the interviews meant to decide to some extent what 'inclusion/exclusion' is.

This takes us back to the beginning of this chapter and the discussion of the unassuming aspect of methodology, where it was argued that the way that the data are constructed has implications for analysis. The argument put forward is that data is constructed *in context*: in the context of the theoretical framework of the study, the context of the methodological/analytical framework, and the context of the setting in which data is collected. Thus when researchers design their methods/techniques (in this case, the interview schedules) they have a general idea of how they are going to analyse the data of these interviews.

Going back to the designing of the interview schedule, one possible way of selecting what to include in the interview was to follow a Grounded Theory model (Strauss, 1999; Strauss and Corbin, 1990; Glaser and Strauss, 1967). To some extent the examples of activities mentioned above and how they gained centrality in the research, can be seen in relation to Grounded Theory. The principles of Grounded Theory have influenced this study because it is an approach to knowledge construction that acknowledges the importance of comparisons in the research processes of conceptualising, categorising, and constructing typologies. The central caveat of Grounded Theory is that the theory is generated from the data. As Glaser and Strauss (1967) argue

The emerging theory points to the next steps –the sociologist does not know them until he is guided by emerging gaps in his theory and by research questions suggested by previous answers.

(Glaser and Strauss, 1967, p. 47)

One of the main characteristics of Grounded Theory is that it interrelates the stages of data collection and analysis, since each stage of data collection is followed by a stage of analysis, which is followed by a stage of data collection and so on, until the concepts of the study are 'saturated', and no more data collection is needed.

One problematic aspect of this approach is, however, that it does not acknowledge the significance of values and assumptions underpinning the selection of research questions, data, and theory. 'Data' –despite being the result of an analytical process- is seen as 'neutral' and 'accurate' representations of phenomena. In addition, the researcher is seen as gaining knowledge in a linear way and becoming more 'knowledgeable' during the process of the research.

Grounded Theory is not the only approach that uses a comparative method in developing theory. Durkheim (1964) considers comparative method as the only one suitable for sociology. Durkheim's comparative method is based on the principle that "one cannot explain a social fact of any complexity except by following its complete development through all social species" (p. 139) and while they are at the same stage of their development. An important element of Durkheim's comparative method is that each effect has a single cause, and this is one of the principles of constructing categories and typologies of phenomena –by breaking down each phenomenon until one effect relates to only one cause (for his discussion of education that follows to some extent this comparative method, see Durkheim, 1956).

Weber (1949), without denying the causal character of knowledge, acknowledges the importance of 'cultural values', 'points of views' and 'evaluative ideas' in the selection of specific phenomena to be studied. Weber uses the concept of 'ideal type', an analytical construct that "In its conceptual purity, this mental construct (Gedankenbild) cannot be found empirically anywhere in reality. It is a *utopia*" (p. 90). Ideal types are compared with real phenomena allowing for "the logically *comparative* analysis of reality by ideal-types in the logical sense" (p. 98).

Finally, Popper (1965) refers to four ways of testing a theory in order to verify and provisionally accept it: testing for internal consistency, testing the logical form of the theory, testing in relation to other theories, and testing the empirical applications of the conclusions of the theory. All of these tests are based on comparisons, which aim to verify or falsify the theory beyond doubt. (Silverman, 2000, pp. 178-179, and Hedström et al., 1998, pp. 351-352). In this model however, comparisons are seen more as a testing method than the means of constructing theory and knowledge (see Chapter Three for the influence of this approach on comparative education).

All the above very sketchily presented models of using comparative methods for developing theories have a number of similarities as well as differences. One important similarity is that they perceive comparison as an accumulative, 'large-scale' process. In a sense the more comparisons are made about a theory or phenomenon, the more substantial the basis of the produced knowledge becomes. In addition, in all the above comparative approaches 'phenomena' are accepted as 'real' and this assumption is what legitimates and validates the comparisons made.

An alternative comparative method is the one used by Foucault in *The Archaeology of knowledge* (2000). According to Foucault

Archaeology is a comparative analysis that is not intended to reduce the diversity of discourses, and to outline the unity that must totalise them, but is intended to divide up the diversity into different figures. Archaeological comparison does not have a unifying, but a diversifying effect.

(Foucault, 2000, pp. 159-160)

This type of comparative analysis is 'limited and regional' aiming to explore the relationship/configuration between the selected discourses. It is limited because it does not attempt to cover all the possible discourses or map all the possible formations. Since discursive relations are neither internal nor external to discourse but rather they "are at the limit of discourse" (p. 46), then the comparisons between discourses (and even between discourses and non-discursive domains) are located at that space in which discourse becomes 'practice'.

This model of comparative analysis can be seen as 'liberating' because it accepts –at least implicitly– the limitations of comparisons; it is not possible/nor necessary to include everything in comparisons, it is not necessary to compare the 'same things' –let alone 'all things'– at the same stage of 'development' and in the same way, and causality has limited significance for understanding the formations of discourses. In addition, the intuition, interests and decisions of the person making the comparisons are not seen as affecting the 'validity' of those comparisons, since the validity of the *comparative analysis* is what is significant.

This comparative method does not aim to ‘expand’ comparisons, but rather to ‘limit’ them. It is through this ‘limiting’ process that theory is constructed.

If comparisons are seen in this way, then the ‘data’ produced from research can be seen in a similar way. Thus, it is not necessary to ask each and every possible question about inclusion/exclusion nor it is problematic to pre-define the areas of discussion, and one can include in the schedule questions that seem ‘irrelevant’ to the main topic –but at the same time are ‘meaningful’ to the participants. The important thing is that the three ‘contexts’ of the research –theoretical, methodological/analytical, and setting- do not contradict each other in the questions asked.

How to ask

This model of analysis influenced this study and especially the way the students’ interview questions were constructed³⁸. The idea for the structure of the interview schedule with students came from a type of scrapbook that was very common when I was a primary and secondary school student in Greece. In these scrapbooks a question/topic was asked at the beginning of the page and then friends of the owner of the scrapbook were invited to write their answers. The range of questions included things like ‘what is friendship?’, ‘what is a kiss?’, ‘which is your favourite actor/actress?’, ‘what is your favourite lesson?’, ‘write your best memory from school’. Although there were a number of areas covered in these scrapbooks such as school, peers, popular culture, dreams and

³⁸The interview schedule for staff does not follow explicitly this approach. The teachers’ interview schedule and questionnaire are presented in Appendix II.

expectations for the future and so on, the order of the questions was more or less irrelevant.

Young people answered in different ways: the poetic, the commonsense, the cliché, the sarcastic, the mundane, the rhetorical, the original, the dialogical, the moral and so on could be found in those scrapbooks. Young people 'played' with their personal styles and sometimes used different ones for different questions. This fragmentation is not incompatible with 'narrative'; it does not deny the possibility of 'stories'. The stories produced can allow for discontinuity and contradiction, and the text in its fragmentation presents narratives of individual and collective identities, located in a specific historical context (see Blumenthal, 1999; Hird, 1998).

This fragmented presentation of the totality of being a twelve-year old young person as it was presented in those scrapbooks, is something that is also evident in schools where space, time, activities, roles, sense of private/public, and rights/obligations are fragmented, changing and sometimes contradictory, and contribute in creating fragmented student identities.

Schools are places in which constructions of childhood, adulthood and transition from childhood to adulthood are at work. These constructions are accepted, contested, negotiated and changing as students go through the transition from childhood to young-adulthood and eventually to adulthood. These constructions of childhood are central in how inclusion and exclusion are defined. Notions of competence, rights and responsibilities, and decision-making are part of an understanding of what childhood is, and how it is defined in relation to/contrast to adulthood.

Communication –speech and language- is central in reinforcing adult/young people’s relations. The interview schedule was developed based on the experience of fieldwork in the English school. One of the characteristics of this school’s culture was a tendency for relatively limited engagement of students in ‘communication’ during lessons. That was something that was also noted in the OFSTED inspection of the school that happened before the fieldwork. Coming from an educational background in which students have to ‘perform’ in front of the class and demonstrate their ‘communication skills’, and without having any other experience of English schools, I could not judge whether this was happening more in this school than it might happen in other schools in general. My experience since then makes me more confident in saying that in that school the involvement of students in oral communication during lessons is probably less than the ‘norm’. This, however, does not mean that the students were silent during lessons but rather mainly one-word or short answers were expected as contributions in lessons. Students were vocal in non-lesson related communication during lessons time. Negotiation of ‘who dunnit’ incidents or possible punishment, or exchange of stories and jokes with teachers were very common.

On the other hand, I found myself in the opposite position. I was able to help with spelling or answering questions (formal lesson communication), but I was lacking in the everyday vocabulary to make small talk or contribute to the playful exchanges between students (and even between teachers in the staff room).

Woods (1996) argues that

As a complex and difficult activity, teaching generates a great deal of myth, mystery, and homespun, pragmatic advice to new recruits, 'Never smile until Christmas' is a common recipe for coping through one's first term.

(Woods, 1996, p. 19)

I heard this in the English school when student teachers were discussing their experiences (I am not sure if there is an equivalent in Greece, since my training as a nursery teacher was based on a child-centred approach), but I did not have the luxury to follow it. I smiled to compensate for my lack of communication skills. Smiling and listening were my 'techniques' for relating at first to students. Sometimes the lack of understanding and communication was intimidating, sometimes frustrating (a couple of times students asking me something would end their effort by saying 'never mind' and disappear, fed up with my lack of comprehension), sometimes it was a way in (when 'shy' students felt that I was approachable, or students took it upon themselves to explain things to me), and sometimes it was funny (and even surreal) when misunderstandings occurred.

My role and communication skills in the school gave me a particular position of 'otherness' that was both an obstacle to communication and allowed for 'different' or 'unexpected' things to be said. At the end of the fieldwork, I asked the Year Eight form to write something for me to take with me about the experience of having someone (a researcher) in lessons³⁹. The following is an example of how in the formal context of a letter a student responded to that:

Dear Electra [sic]

My name is Penny and I am 13 years old. This is my second year at [name of] School. My best friends are Liz and Sue. I have been abroad a lot of times but I have not yet been to Greece.

³⁹ I did not specify the form or content of the text. However, since this happened in an English lesson the teacher suggested that it could be a letter addressed to me. Not all students did the 'task' or gave a complete 'text'. The 'letters' that I got back were mainly from girls.

When I was 9, my dad left my mum, which is happening a lot with the people I know. I have now got 1 stepsister called Katie and 2 stepbrothers called Steven and Robert.

It must have been hard for you to learn fluent English but it has helped a lot of people at [name of] School. Thank you for coming and helping us do our work

Yours
Penny

This communication context affected how the interview schedule was developed. In the interview schedule, the topics discussed are defined from an adult's point of view. To some extent they are some of the things that adults ask young people about school, such as lessons, achievement, how they spend their time, interests, behaviour and so on.

For many researchers language based-research methods can be problematic when they are used with children, because of the power relations they reproduce. Alternative, 'child-centred' methods have been developed (for example, see Barter and Renold, 2000). Some researchers argue that this type of method (activities, story-telling, drawing, and so on) is more appropriate especially for children with special educational needs who might have difficulty using oral methods effectively (see for example, Begley, 2000; Costley, 2000; Alderson, 1999; Lewis, 1995).

A reason why these methods were not considered as suitable for this study is that they are based on specific, culturally defined, understandings of children and young people. For example drawing pictures in Greek secondary schools is restricted to the subjects of art and technology, and drama is not part of the curriculum. In addition, 'drawing a picture' in the English school was used in many instances as an alternative individual activity for students with special

educational needs. Sometimes I perceived that as limiting, rather than enhancing the educational opportunities of students.

To some extent the 'pedagogical' assumptions underlying these methods is not sufficiently explored (see Thomas and O'Kane, 2000, for a discussion of the similarities between research with children and social work). In cases, these methods may reproduce a pre-adulthood notion of 'childhood', instead of exploring childhood in its entirety (Christensen and James, 2000).

The main questions/topics of the interview are summarised in Table 1. This is more a 'guide' for doing the interviews and for presenting their rationale, than a 'transcription' of what exactly was asked in the interviews. Due to the fact that they were semi-structured interviews, it might be very difficult to find two interviews in which the same questions were asked in the same order.

Table 7.1: Interview questions/topics with students

Attitudes towards lessons
<p>A) Which lessons do you like, (why)?</p> <ul style="list-style-type: none"> • Which lessons don't you like, (for what reasons)? <p>B) In which lessons are you doing well, (and why)?</p> <ul style="list-style-type: none"> • In which lessons are you not doing very well, (and why)? <p>C) In which lessons are you trying hard, (and why)?</p> <ul style="list-style-type: none"> • In which lessons are you not trying very hard, (and why)? <p>D) When you don't understand something in a lesson do you ask for help?</p> <ul style="list-style-type: none"> • Who do you ask to help you?
Attitudes towards school life and school rules
<p>E) Do you participate in any activities after school/outside lessons? [extra-curricular activities]</p> <p>F) Do you follow the rules of the school?</p> <ul style="list-style-type: none"> • Questions about specific rules (e.g. talking in the class, homework, etc) • Do you agree with the school rules, (why)? • Have you ever been in trouble and if so, for what reason? <p>G) Can you describe something that happened last term/this year that you feel really good about?</p> <ul style="list-style-type: none"> • Can you describe something that happened last term/this year that you didn't really like/was a bad experience?
Relations with other students/friends
<p>H) With whom do you like to sit in lessons?</p> <ul style="list-style-type: none"> • With whom do you usually spend time during break and lunch- time? • Do you meet any of your school friends after school? <p>I) Have you ever had any problems with other children in school?</p> <ul style="list-style-type: none"> • What happened?
Homework
<p>J) How long do you spend each week (day) doing your homework?</p> <ul style="list-style-type: none"> • If you need any help, is there someone at home that you can ask to help you?
General attitudes around school
<p>K) Can you describe what a 'good' student does in school?</p> <ul style="list-style-type: none"> • Can you describe what a 'bad' student does in school? <p>L) Do you like school, (why)?</p> <ul style="list-style-type: none"> • Do you think that school is important to you, (and for what reasons)? • What do you like the most in school? • What do you like the least in school? • Imagine that you could change anything you want in school, what would you like to change? • Do you prefer this school or your primary school? (only asked to year seven/A' grade students)
Feedback questions about the interview
<p>M) What do you think about the interview, did you like it or not?</p> <ul style="list-style-type: none"> • Did you find it easy/difficult? • Were the questions interesting/boring/ok? • Is there something else that you think that I should have asked about school?

Inclusion/exclusion is implicit in these questions in the same way that, most of the time it is implicit in the school context. Students interpreted the interview questions in a number of ways. For some students –in all schools- these questions initiated discussions of such issues as: relations with teachers; parents' and peers' expectations; their personal 'pro or anti-school' behaviour; special needs; sufficient/lack of support; their future; and so on. For others the questions allowed for a presentation of school through what can be called the 'school rhetoric', giving away very little about themselves. Others gave a second or third person presentation of a student's identity. A small minority of students gave one-word answers to most questions and few students disregarded the questions and constructed alternative stories.

In the feedback questions asked at the end of the interview there were two recurring themes about the content of the interview. Five students said that they expected questions about smoking and drug taking to be asked. Asking about smoking, drug taking, vandalism and stealing however could be seen as requiring students to 'self-report' particular acts, and that would have been inconsistent with the overall rationale and ethical context of the study.

The other thing mentioned by eight students is that in the interview there was no direct question about teachers. Every time that a student commented on that I found it very difficult to explain the omission. Initially there was a question about how do you describe a 'good'/'bad' teacher similar to the one about students. The truth is that I found it difficult to ask about teachers directly because of my role in the English school and because in the first two pilot interviews students answered

this question by naming teachers. However, almost all students spoke about teachers in their interviews. An example is the following:

I.S.: Imagine you can change something in the school, what would it be?

Boy: To have more breaks, dinners, get rid of some of the teachers, get some good teachers in.

I.S.: How do you describe a good teacher?

B: Someone who gives you a choice of what you do. Not telling you what to do all the time.

(Boy, Y8, English school)

Translating what was asked

When the interview schedule was translated into Greek some changes were necessary. There were things that had to be changed to fit the specific context. For example questions about settings were not relevant and questions about in-class help/support could refer only to teachers and peers since classroom assistants do not exist in Greek schools. A topic about students' activism was added. The above, however, are obvious changes relating to the context. In addition to that every question was re-evaluated and an attempt made to find its meaning in the new language.

Wierzbicka (1997) discusses the problems of surveys exploring how different concepts –e.g. friendship- differ in different cultures by asking the same questions in different languages and she argues that

The procedure seems straight forward –except for one small point: if the question is asked in Russian, or in Japanese, what word will be used for *friend*? The assumption behind such questionnaires, or behind comparative studies based on them, is that, for example, Russian, Japanese, and English words for “friend” can be matched. This

assumption is linguistically naïve, and the results based on it are bound to present a distorted picture of reality.

(Wierzbicka, 1997, p. 23)

In a sense I started this study from a Greek perspective, established the concepts used in the study in the English context during the first stage of the fieldwork and reworked them to fit the Greek context for the second stage of the fieldwork. Ideally, the two contexts, the two languages and the two cultures should have been used at all points in the study together. In practice, that was a very difficult analytical task and sometimes it was easier to focus on only one context or to presume that things/words/concepts are 'similar'. Hatim and Mason (1997) argue that

Most obviously, the translator has not only a bilingual ability but also a bi-cultural vision. Translators mediate between cultures (including ideologies, moral systems and socio-political structures), seeking to overcome those incompatibilities which stand in the way of transfer of meaning.

(Hatim and Mason, 1997, p. 223)

I am not sure that I have always been up to the task. Trying to give meaning to the questions 'Do you like school?' and 'Σου αρέσει το σχολείο;' is not simple, even though the translation is straightforward. 'Like' 'school' and their Greek equivalents, are different, as is the context in which the questions are asked. Translation and counter-translation of the interview questions, and of course of the interview transcripts, is seen as an analytical process, a process that also constructs data and analyses this data.

Reading the 'data'

The unassuming aspect of methodology extends to the final analysis of the 'data'. It is difficult to describe separately how this analysis has been conducted because it is not in any essential way different from the analysis that happened throughout the research process (Bryman and Burgess, 1994). The two big categories of knowledge construction and ownership/citizenship presented in Chapter Five have been used in the analysis to develop a comparative understanding of inclusion/exclusion.

In addition, one aspect of the analysis has been concerned with what data is defined as 'public' and what stays 'private'. This is related to the ethics of the study, but also to issues of inclusion/exclusion. Some of the ethical considerations of this study have been mentioned in previous chapters (e.g. consent, anonymity). For example 'informed' consent was asked from all students and their parents⁴⁰. In one case a student decided not to participate in the study even though his parents gave their consent.

However, seeing the research process, production of data and analysis together means that ethical considerations are not limited to the fieldwork and data collection stages. I have to admit that at the beginning of the study I was not

⁴⁰ Parental consent was requested through letters. In each school a different process for sending out the letters was used. In the English school the SENCO drafted the letter and it was sent through the central system of the school. The request for consent was asked from the school on behalf of the researcher and it was an opt-out consent. In the first Greek school I distributed the letters to the students after explaining the research. In the second Greek school, the head-teacher gave the letter to teachers in each form, who then gave them out to students. In this case, I had no contact with the students in the process of asking parental consent. The Greek letters asked for opt-in consent.

In the English school there were no cases of refusal. In the first Greek school the parents of two students refused consent and of the parents of another asked to see the proposal of the study. In the second Greek school there were no refusals from two of the forms. There were, however, a relatively high number of refusals from the third one. My impression is that in this case it was not the parents that refused, but that teachers teaching that form who were negative about the research and influenced the participation of the students.

worrying too much about the ethical framework of the study. I took for granted that my training as a teacher was sufficient to safeguard the ethics of the research. This might be seen as a 'professional' approach to ethics.

My understanding of ethics has been informed by two different and almost opposite approaches. On the one hand, the writings of American 'existential sociology' research (see Adler and Adler, 1987; Douglas, 1976; Johnson, 1975) and the early works of the British school ethnography (see for instance, Hammersley, 1990; Burgess, 1984a; Ball, 1981) have influenced this study. What these two bodies of literature have in common is a research-centred understanding of ethics (which also represents the general understanding of ethics of that period). This understanding stems from the assumption that researchers are 'doing social life' (Douglas, 1976) and in the process the methodological morality of the researcher/research is an 'accommodative' and contextual one (see for instance, Marshall and Rossman, 1995). Thus a 'broad' perception of research as an activity is used (Jenkins, 1987) in which anything that the researcher 'learns' is data (see for instance, Ball, 1984 and Hammersley, 1984 for a discussion of staff-room conversations as legitimate data).

On the other hand, a more recent approach to ethics –especially towards research with children- has also influenced the study. This is a participant-centred understanding of ethics in which the 'protection' and 'rights' of participants are paramount. This approach does not see 'ethics' as contextual to be 'negotiated' in the specific methodology of a study, but rather as being applied from the outset to the study.

Especially in research with children two types of ethical consideration can be distinguished. 'Protection' ethics -including protection from the researcher (Walker, 2001; M. Okely, 2000) refer to the limits of anonymity and confidentiality -particularly in the case that 'harm' is suspected. 'Right' ethics refer to the rights of children to know what the research is about, to give full consent and withdraw it at any point, and to be able to express their views (Miller, 2000).

The contextual approach to ethics -especially in an educational setting, which has its own 'ethical' framework-, is important. In this case, ethics cannot be predefined completely. Participants (and even researchers) 'forget' exactly what the researcher is in there for and communication from both sides may go beyond what 'data' was agreed to be collected in the participants/researcher 'contract' of consent. On the other hand, communication and interaction cannot always be seen as 'data'. Individuals are participants in the research process, and not 'objects' of the research process. Especially, in an educational setting where 'privacy' is limited and students' histories and backgrounds, as well as actions are subject to scrutiny, it is important that researchers find ways to respect and protect the participants' 'private' selves.

To give an example from the research, in the English school a girl from a form that did not constitute part of the main sample of the research was showing me some photographs of her family during a lesson. At some point, her friend sitting next to her told her, "Tell Miss, tell her the truth!" The other girl replied that she did not want to, and I intervened saying that she did not have to tell me anything, if she did not want to. The two girls discussed it for a while and at the end, the

girl with the photos told me that the little baby on the photos was not her baby brother, but her own son.

In an ethical framework strictly based on consent this communication cannot be used as 'data', because the girl had not given her informed consent to me. On the other hand, she was aware of my 'peculiar' role in the school, when she decided to talk to me. Her decision was an 'informed' one (see Burman et al., 2001). I used this information as 'private', which means that I did not ask directly or indirectly any questions of her or anybody else in the school to confirm it or to learn more about it. In addition, nowhere in this text does this information again relate to the specific girl. However, this information became part of the research study and therefore, data.

A number of things that I saw, learnt or was told about during the research study are seen as 'private' and have been kept outside this text. This influenced the analysis to a great extent. For example, complete 'portraits' of the students are not presented in the text. Since it was not possible to incorporate information about each and every student in the sample, it was thought that giving information for specific groups, e.g. students with special educational needs, would have been inappropriate. Sometimes this may mean that a full picture of who is talking is not given. Creating a 'public' forum for the students and teachers in the text and at the same time respecting their 'private' selves, results in an analytical compromise. It is however, in my view, an ethically necessary compromise.

Conclusion: a methodology of enjoyment

This chapter presented the unassuming aspect of methodology. Seeing methodology as unassuming means that research is a highly regulated social activity, but not essentially different from any other social activity. In a sense this unassuming aspect aims to counter-balance methodology as a complex, messy process and find what is at the 'core' of methodology in a study in relation to the 'observing', 'asking', and 'reading' acts of research. The students who engaged critically with the interview questions and commented on the content of the questions, provide examples of how the research (including its limitations) became 'meaningful' to the people involved⁴¹.

Research taking place in the social world is unpredictable, not only because the social world is unpredictable, but also because of the contradictions that are part of any understanding of what research is, and what it should do. The actual process of research is where decisions about these contradictions are taken. These decisions can also be contradictory and take research in different directions.

The unassuming processes or 'watching', 'asking' and 'reading/reviewing' are researchers' 'tools', but tools that can be used only through the researchers themselves, and their epistemological framework. They are not 'neutral', they do not simply capture reality, but they interpret it. In this way they are analytical tools.

⁴¹ It is interesting that none of the students commented on the structure of the interview. Although there was not a specific feedback question about the structure, it is possible that this adult/student, question/answer format is seen as 'natural' in a school context.

This and the previous two chapters presented some glimpses of how this research was developed and how it constructed –at the same time- a comparative, ethnographic interpretation of the social world. This is an incomplete research account. More is left out than is actually included.

However, before closing this account, another aspect of methodology needs to be mentioned, research as ‘enjoyment’. This is the most difficult aspect of methodology to write about, because it is not part of research’s ‘language’; it does not fit into the conventions of academic writing. Enjoyment, when it appears, is seen as something that happens despite all the difficulties and problems. The “strange, sometimes unpleasant, sometimes intensely interesting adventure” described by Malinowski (1992, p. 7), is how the research experience is seen. There is a language to describe the ‘strange’ and the ‘unpleasant’, but not the enjoyable. Enjoyment is given by mere anecdotes that spice up research accounts. Furthermore, enjoyment has no methodological significance. It is irrelevant to the research and the text; it does not affect the representation presented, or the validity of the study. In that sense enjoyment is seen as subjective and limited to the researcher’s experience.

I do not know what a methodology of enjoyment might look like and what it would comprise. I even find it difficult to incorporate ‘enjoyment’ into this account. It is easier for me to portray how sometimes while on the bus going to the schools I wished for a minor accident to happen so I would not have to go to the school, than to talk about the research as enjoyment. I cannot talk about the exhilaration after a particularly good interview, the excitement of doing my first proper experiment in a science lesson, the experience of line dancing in the

Assembly room, the feeling of satisfaction when students greeted me by calling my name outside the schools, or the rare moments when everything made sense. The lack of methodological significance makes it difficult to justify all these as part of the text. In order to include them, they have to relate to something else, e.g. to the process of understanding the field, the establishing of rapport with participants, and so on. However, I believe that 'enjoyment' is methodologically significant, that it is one of the ways that researchers make decisions about the research. In this and two previous chapters a number of decisions have been described in relation to lack of enjoyment: abandoning the research the first time in Greece because I was not *happy* with how it was going; not probing further about the racist remarks; 'excluding' one student from the interviews, are some of the decisions that I took in accordance with my threshold of enjoyment. What is sometimes called researchers' intuition, the impenetrable process of making decisions about the research, can be explained to some extent by the notion of a methodology of enjoyment, in the case that it will become part of the research language.

In conclusion, Hastrup (1994) argues that

In the theoretical landscape created by the authors, the individual explorations have had the character of itineraries rather than maps, describing the actual experience of the traveller rather than encoding the abstract picture of the cartographer.

(Hastrup, 1994, p. 223)

This and the previous two chapters presented some parts of my itinerary during this study. Although this itinerary may be important in itself, its main use is to provide ways of engaging with and read the text, to create a framework in which the relevance and the validity of the text can be judged.

Part Three: Mapping Inclusion/Exclusion in England and Greece

Chapter Eight

Presenting the Two Contexts

Introduction

This chapter presents the two '*contexts*' in which this research study took place. Up to this point these two contexts have been mentioned in relation to international educational developments, specific countries, national policies and histories, socio-economic and cultural characteristics, educational systems, schools, classrooms/forms and even individuals. Moving from the specific to the general, from the macro to the micro and vice-versa in a comparative ethnographic study requires shifting constantly the focus of the presentation between different levels.

This presentation starts from the school level –which can be located at the meso-level of a multilevel analysis (see the categorisation by Bray and Thomas, 1995,

p. 475). One obvious reason for taking schools as the starting point is that the research took place in schools; both the sites and the unit of the research are schools.

Schools are symbolic markers of education. For instance, schools buildings are geographical and symbolic landmarks in the areas they serve. A 'community' is defined to some extent from its schools. For example, in recent years in England, exam results and OFSTED inspections have differentiated successful and failing schools. Places in achieving schools are at a premium, affecting house prices and defining desirable areas.

In addition, schools –as buildings- are symbolic reminders of knowledge, society, and roles of individuals, and of their relationship with the educational system in a specific time and place. In that sense schools are also cultural landmarks.

It can be argued that in Western societies there is an *archetypal* school that is recognisable in different countries and localised communities. This archetypal representation of school reinforces the common characteristics of mass education in different countries and the real and symbolic power of education. The archetypal school takes different forms but there are some core elements that are constants: the purpose-built building; the differentiated roles of adults and

children; the transmission of knowledge, of values and discipline; and the relative autonomy of the 'school' life from the wider context⁴².

In this chapter the three schools are presented as archetypal schools, giving a semi-fictional account of one school in England and one in Greece, or more precisely of an English school in a big city in the North of England, and a Greek school in the broad area of Athens/Piraeus. The account is based on the 'real' schools of the research, but tries to present them in relation to an archetypal school. The aim is to move from the specific to the general, by setting the two schools in their contexts. In addition, this helps to anonymise the schools. Although all three schools more or less fit the archetypal school model, they have a number of specific characteristics that make them unique and identifiable.

Approaching the schools

The English school The school is situated in a housing estate on the outskirts of a big northern city. The school is close to the main road of the estate were the

⁴² There are different representations of the archetypal school in television (The Little House on the Prairie, Saved by the Bell), books and films (Harry Potter), and so on, which create powerful images of what a school is about and what takes place in it. Representations of the archetypal school are recurrent. For example, in J. K. Rowling's *Harry Potter and the Philosopher's Stone* the Hogwarts School of Witchcraft is a representation of a Public School. It is a selective school according to witchcraft abilities that are mostly inherited. Students from wizarding families and from muggle families (non-wizarding families) that have these abilities are accepted. This arrangement is not accepted by everyone, and as one of the characters argues, "I really don't think they should let the other sort in, do you? They're just not the same, they've never been brought up to know our ways". The school has a number of rituals and old traditions, including four Houses. To win the game of Quidditch is very important for each House's reputation. This school is contrasted with Stonewall High, the local comprehensive in which Harry Potter was going to go and where according to Harry Potter's cousin "they stuff people's head down the toilet first day at Stonewall". The subtle ways of competition between individuals and Houses in Hogwarts School is contrasted to the straightforward bullying of the comprehensive school. The fantasy world of Harry Potter is based on very 'real' archetypal schools.

shops are. The estate has mainly semi-detached houses, which seem relatively large from the outside.

Approaching the school in the morning, you can see children from this and a primary school walking in and out of shops, walking in groups towards the school or riding their bicycles. You can recognise the students from their jumpers with the school badge. The extensive fields around it define the school. In the open green space are the three buildings of the school; it is a multi-site school. The buildings are low (the highest is three storeys), but still they are the highest buildings in the area. It is an average-sized secondary school catering for around seven hundred eleven to sixteen-year-olds. Although there are yards and parking lots outside the buildings, the boundaries between the school buildings and the fields are unclear. This gives the impression of openness that is accentuated by the fact that the public uses a path between the school buildings.

As the beginning of the school day approaches, children and adults walk around the school. Children arrive on foot, or by bus or car, most of them unaccompanied. School staff arrive mainly by car since most of them do not live in the area. A few children in groups of two or three share a cigarette in an area protected from the wind but open to the glares of passers-by.

For a newcomer it may be difficult to find the main entrance of the central building. There is a school sign and some notices giving directions, but the main entrance is not distinguished in any way. Cameras are installed above all the school entrances.

Outside the school office there is a desk where two students –different ones every day- welcome visitors. You sign in the visitors' book and write your name on a

label. Waiting for your escort, you have time to look at the displays of students' course-work, photos of school performances and of the links with local businesses and organisations. Despite the security precautions, there is a welcome feeling and a sense of genuine informality.

The school has a big library, assembly halls, dining room, dedicated subject classrooms (science, technology, food technology), IT suites and so on. Taking a tour of the school you will notice the displays in the corridor and the classrooms, and that in each classroom –apart from the standard school furniture such as desks and chairs- there are bookcases with exercise and textbooks, additional equipment and in most of them a computer. Some classes have an anteroom that is used as a teachers' office.

Some parts of the school are new and others have been recently redecorated. In general, the school is well kept; some of the equipment is brand-new and state of the art. The most specialist equipment is due to the specialist status of the school in one area of the National Curriculum. However, in the older parts of the school the materials look old and worn.

The Greek School To approach the Greek school, you need to tackle the rush hour traffic. The school is off the very busy main road of a combined residential and commercial area. The area is densely built-up. Blocks of flats (four floors high in average) surround the school building. On the ground floor, most of them have shops and students go in and out of 'corner shops'. Cars are parked outside most buildings, and sometimes on the pavement making access to the school tricky.

It's difficult to relate the students to the school since they have no uniforms. Their age and the big school bags (usually backpacks) that they carry are the only give-away signs. The majority of boys and girls wear a 'uniform' of casual clothes, mainly jeans, jumpers and trainers. Outside the school entrance there are groups of students waiting for the bell. Some of them smoke. Some of the older ones from the non-compulsory Secondary school park their bikes there.

The school building is lower than most buildings around it. It has a ground floor and two storeys above it. It is a building that looks 'inwards'. From the outside you have very little indication of what is inside the school complex. The school building is used by a number of 'schools'. A sign outside the building lists all the 'schools' housed in the building. There are compulsory secondary schools (called 'gymnasia' (γυμνάσια) catering for students aged between 12 and 15) and non-compulsory secondary schools (called 'lyceia' (λύκεια) catering for students aged 16 to 18 years).

The building is used in shifts, which means that one 'school'⁴³ uses it in the morning and another in the afternoon. In most cases the shifts change from week to week, so one week a school is a 'morning' one, and the next week is an 'afternoon' one. This is common practice in Athens and other big cities where there are not enough buildings to accommodate all students. The compulsory secondary school in this study is a medium-sized one with around 250 students.

You enter the school from an iron gate. This is the only entrance in use, although another one may exist at the back of the building. A person stands at the gate at the beginning and end of the day and at break times to check the people that enter

⁴³ Each school has a different head teacher and teachers (although some teachers may teach in two schools) and students, and is an independent organisation.

the school. This person is usually either a caretaker, the person responsible for the tuck shop or a teacher on duty. This person directs you to the office of the school you want to visit.

Entering the building, you have full visual access to it. In front of you there is a schoolyard with basketball and volleyball equipment. The actual building is L-shaped and covers two sides of the yard. A semi-covered staircase leads to each of the floors. All floors have the same design; corridors-balconies open from the side of the yard, giving access to a series of classrooms with big windows facing the corridor/balcony. There is a school office (usually a separate one for each school), a staff room, and a tuck shop. In addition there is (not in all schools) a big hall used for assemblies, indoor PE lessons and social events, and possibly one or more IT suites and/or a chemistry or physics lab.

In the tour of the school you also notice that there are no displays and the classrooms have mostly standard school furniture (desks, chairs, blackboard). In most classes there is no decoration apart from a picture (icon) of religious connotations or a poster. However, the school seems freshly painted. There are no serious signs of damage or vandalism of the building, but in some classrooms there are a couple of torn or broken chairs, or desks at the back of the room.

These schools fit more or less the archetypal school model⁴⁴:

- The main unit of the building is the classroom, i.e. the room where knowledge is transmitted and learning and teaching take place

⁴⁴ For a discussion of the Greek model of 'archetypal school' see, Germanos, 1993 and Solomon, 1992.

- There are distinct uses of space related to the needs of learning/teaching and the accommodation of children's needs
- Space is divided into public, semi-public and private areas in which different groups (children/adults, students/staff, other staff, parents, etc.) have different degrees of access
- There is also a clear distinction between built and open areas where different activities take place
- Finally, the archetypal school is part of something bigger. It is part of an educational system and that is obvious in the way that it is organised and functions

Both these schools were built in the second part of the twentieth century and are examples of purpose-built public buildings of that time. They were built to be functional, low-cost and low-maintenance.

These schools also relate to the expansion of secondary education in the second part of the twentieth century. They are part of the 'democratisation' of the education programme of that period. They were built to provide education to all children and young people. These schools provide education as an entitlement, as a right that each and every child has in the societies that they serve. The nature and extent of this entitlement, of course, is not constant, but historically defined. In the tour of both schools, your guide will mention the installation of lifts in order to accommodate students with physical disabilities. None of the schools has students who use a wheelchair or have restricted mobility, and there are a number of unsolved access issues (e.g. multi-site school in England, entrance steps and

lack of a disabled toilet in Greece⁴⁵). The lifts, rarely used and mostly locked to prevent students from playing with or vandalising them, are proof –at least at a symbolic level- of redefined entitlement.

In general, these are mainstream schools providing ‘free’, ‘compulsory’ education to boys and girls coming mainly from the school ‘catchment’ area. Part of the mainstream identity of the schools is that the school population is defined in relation to other school populations and as we will see later these other populations are not always the same in the two context, or for all the participants; other mainstream schools with a ‘better’/’worse’ reputation, private schools, special schools, and even schools in other countries are examples mentioned by the participants during the study.

In both school buildings specific notions of childhood and children’s well being are evident. These buildings cater for ‘young people’ and few allowances are made for the ‘childish-ness’ of the students. These are ‘full-sized’ schools, built for adults and adults-to-be on an adult scale. The size of rooms, the height where the coat pegs are, and the size of desks and chairs are much closer to those appropriate for adults rather than young children. These schools are different from nursery and primary schools⁴⁶.

Finally, these are urban schools. Despite the differences of the built environment and the structure of communities/neighbourhoods in the two contexts, the schools have a clear urban identity. They belong to a network of other schools in the area as well as citywide.

⁴⁵ For access and enabling environment see Esteve et al., 1994; Hadley and Wilkinson, 1995; Sahinoglou and Koukkos, 1994

⁴⁶ This difference is more striking in the English context where primary schools are more ‘child-friendly’ and secondary schools are much larger than primary ones.

Understanding the schools

These schools fit in the archetypal school model. To anyone with previous experience of this model, they are instantly recognisable. At the same time they are very different from each other. In the imaginary scenario that the schools swapped places in the two contexts, they would be completely and utterly out of place. Some of their differences are easily understood; for instance, the architectural differences due to the weather conditions. The English school is built in a way that 'protects' from the rain and cold and the Greek school from the sun and heat. Most of their differences however, are more difficult to decipher. The size of the schools, the outlook and organisation of the classrooms, the roles of the participants, the content of knowledge transmitted are some of the examples. The answers to these differences cannot be found solely in the 'schools'. In a sense, understanding a school as an entity requires an outside perspective. 'Schools' are symbolic representations of the contexts in which they belong and products of these contexts.

Yet, defining the 'context' and deciding how to present it in order to 'understand' the schools is not simple. On the one hand, it is easy to say that the wider socio-political, economic, cultural and historical context defines the schools. Moving from this statement to a contextual understanding of the 'schools' is not as simple. For example, Placier (1998) argues that

Qualitative researchers cannot become historians in order to provide historical contexts for our studies. Qualitative research is already a labor-intensive enterprise. We can, however, deepen and challenge our

present-day interpretations by developing a more thorough understanding of the construction of history and the varieties of historical work available.

(Placier, 1998, p. 320)

Producing a complete historical framework for this study is outside its remit and my abilities as a researcher. In the same way the text cannot include a complete political, economic, or cultural account. In addition, the exact boundaries of this account are problematic. In most cases, schools are defined in relation to the national educational system, and educational systems are seen in the context of the nation-state. The nation-state has been implicitly accepted as the context in the above presentation of the schools by defining them primarily as English or Greek schools. However, it is important to include the trans-national character of education in the discussion of the contexts. This is compatible with the inclusive discourse that has a clear international dimension.

Carr and Hartnett (1996) note, “any analysis of recent educational reforms will inevitably be about the past, the present and the future” (p. 14). Without contextualised information the presentation of the schools and their inclusive/exclusive practices can very easily become simplistic ‘vignettes’ of the school reality. Defining the ‘contexts’ is a theoretical/analytical issue in the sense described in the previous chapters. As I write this, five piles of books, articles, statistics, and notes are on the floor: one for general education in England, one for general education in Greece, one for special education in England, one for special education in Greece, and one for comparative research (especially at a European or ‘Western’ countries level). Each of the piles represents a small part

of the relevant existing literature. At the same time each of them covers, to different degrees, the history, philosophy, sociology, pedagogy, economics, policy and so on of their area. There is also hardly any document that is not 'comparative' –either explicitly or implicitly- in these piles. All the documents in the 'general education' piles make reference to other educational systems, and the 'special education' documents refer to general education and/or other educational systems.

In this study these documents are used to help the understanding of the contexts and thus to provide the 'tools' with which to understand the ethnographic knowledge of the schools. In addition their aim is to support (as they have also shaped) the arguments of the study. In doing this, the references made to these documents, the information given and the underlying theories and assumptions are not 'neutral' ones. They become also the 'data' of the study.

Furthermore, the contexts are presented below in a necessarily 'comparative' mode. The aim is to present both the English and Greek education/context. This however, does not mean that the two 'contexts' are presented only *in relation to* each other (in a model that uses differences/similarities as the main analytical method). They are presented *side-by-side*. This means that they are at the same time distinct, related and even 'overlapping' (e.g. in the case that they come together under the EU or OECD umbrella).

In order to achieve this two techniques are used. One is to make successive presentations that give information from different perspectives and disciplines about different aspects of the contexts. This type of presentation acknowledges

that the ‘contexts’ cannot be captured in their ‘totality’ –since their totality is also subject to definition- but rather it provides glimpses of their different expressions. The other technique is to keep the schools (the ethnographic knowledge of the study) at the centre of the presentation. R. Williams (1980) uses the ‘structure of feeling’ to describe the culture of a period. The structure of feeling is “as firm and definite as ‘structure’ suggests, yet it operates in the most delicate and least tangible parts of our activity” (p. 64). The presentation that follows aims to provide a context where the author and the reader can understand as well as feel the schools, and the actions and words of their participants.

Successive presentations: the ‘numbers’

This section aims to give a sense of the two contexts using mainly figures. In Chapter Three a discussion of the problems of collecting and comparing statistical information was presented. Almost all the sources used in the following tables refer to the limitations of data, the inconsistencies of the collected data and the differences in the definitions used. The three tables that follow are not trying to give ‘comparable’ data. Their function is to initiate the presentation of the ‘contexts’ using the succinct power of numbers.

In order to make the tables easier to read and give a sense of consistency some conventions are used:

- In the second column *England (United Kingdom)*, when data is within brackets, it relates to the United Kingdom as a whole. When data is without brackets it refers only to England.

- The columns entitled *Source and (Date)* give first the source (a complete list follow table3b) and in brackets the date that the data relates to. This date in many cases is different from the date given in the title of the source as the period of data.
- The data presented aims to give a picture of the current situation. In a sense, some of the data are more recent than the period in which the empirical part of the research took place. There are only slight changes in most of the data in the last five years, thus the issue is of minimal significance ⁴⁷.
- Finally, data that has already been compared is favoured, even in the case that more recent national data is available (e.g. educational expenditure).

⁴⁷ It can be argued that in the years covered by this research, there has been a relative ‘stability’ in both contexts in relation to planning for education, both as policy and as expenditure. This does not mean lack of educational reform and change, but rather that changes took place within the existing structure and a stable political framework (i.e. the same party being in power).

Table 8.1: General Context

Information	England (United Kingdom)	Source and (Date)	Greece	Source and (Date)
Size	129,720 sq km (243,000 sq km)		131,957sq km	
Total Population	49,997,000 (59,756,000)	1 (2000)	10,964,080	2 (2001)
Inflation	(1,2)	3 (2001)	3,7	3 (2001)
Employment/ Population rasion as a percentage (all ages)	(71.7)	4 (1999)	55.6	4 (1999)
Unemployment (all ages)	(6.1)	4 (1999)	(11.0)	4 (1999)
Public Expenditure for Health (% of GDP)	(5,9)	5 (2000)	4,6	5 (2000)
Public Expenditure for Education (% of GDP)	(4,9)	6 (2000)	3,5	6 (2000)

Table 8.2: Educational Statistics (Overview)

Information	England (United Kingdom)	Source and (Date)	Greece	Source and (Date)
School expectancy ⁴⁸	(18,9)	7 (1999)	15,6	7 (1999)
Population that has attained at least upper secondary education	(Ages 25-64: 62%) (Ages 25-34: 66%)	7 (1999)	Ages 25-64: 50% Ages 25-34: 71%	7 (1999)
Population in education	8,371,100	8 (2001)	1,663,043	8 (1998) ⁴⁹
Private and Private institutions (Primary and Secondary education)	(Public: 64.1%) (Government-dependent private: 30,7%) (Independent Private: 4.2%)	7 (1999)	Public: 94.1% Government-dependent private: NA Independent Private: 5,9%	7 (1999)
Teachers (starting) Salary ⁵⁰	19,999	7 (1999)	19,650	7 (1999)
Years of Compulsory Education	11 Primary: 5-11 Secondary: 12-16	10	9 Primary: 6-12 Secondary: 12-15	11

⁴⁸ This indicator relates to the duration of expected years of schooling under current conditions (excluding education for the under-fives). The OECD mean is 16.7 years. There is a gender difference in school expectancy with women staying longer in education (UK: men 18.1, women 19.7; Greece: men 15.4, women, 15.8; OECD mean: men 16.5, women 16.9). There are also differences in full-time and part-time composition of this expectancy (UK: FT 14.7, Greece: FT 15.4, OECD mean: FT 15.4; UK: PT 4.2, Greece: PT 0.2, OECD mean: 1.2)

⁴⁹ More recent figures are available for nursery, primary and secondary education (compulsory and non-compulsory) only. In 2000 the total number of students for these was 1,390,427 (1,434,117 in 1998)

⁵⁰ In Lower Secondary Education in equivalent US dollars converted using PPPs, the ratio of starting salary to GDP per capita is 1.50 for England and 1.60 for Greece for the same period.

Table 8.3: Educational Statistics (Secondary Education)

Information	England (United Kingdom)	Source and (Date)	Greece	Source and (Date)
Total number of schools ⁵¹	Public sector mainstream: 3,481 Non-maintained mainstream: 2,205	8 (2000)	Public sector: 1,755 'Night' schools: 60 ⁵²	12 (1998)
Expenditure per full-time equivalent student (US\$)	(5,230)	7 (1998)	3,287	7 (1998)
Ratio of students to teaching staff	(14.7)	7 (1999)	10.6	7 (1999)
Intended instruction time (ages 12-14)	940	7 (1999)	1036	7 (1999)

Notes: Sources

1: Office for National Statistics (2001) UK 2002: The Official Yearbook of Great Britain and Northern Ireland, The Stationery Office: London

2: National Statistical Service of Greece <http://www.statistics.gr>

3: Eurostat (Statistical Office of the European Communities) Inflation Rate (general Economic Background) <http://www.europa.eu.int/comm/eurostat/Public> (Last updated 12/07/2002)

4: OECD (2001) Society at a Glance: OECD Social Indicators, OECD: Paris.

5: OECD Public Health Expenditure, Health Data, <http://www.oecd.org>

6: Eurostat (Statistical Office of the European Communities) Spending on Human Resources (Public Expenditure on Education) <http://www.europa.eu.int/comm/eurostat/Public> (Last updated 12/07/2002)

7: CERI (2001) Education at a Glance: OECD Indicators (2001 edition), OECD: Paris

8: Department for Education and Skills, National Assembly for Wales, Scottish Executive, Northern Ireland Department of Education, Higher Education Statistics Agency, Northern Ireland Department for Employment and Learning (2001) Statistics of Education: Education and Training Statistics for the United Kingdom, The Stationery Office: London

9: National Statistical Service of Greece (2001) Greece with figures, National Statistical Service of Greece: Athens

10: Eurydice (The Education Information Network in Europe) (2001) Summary Sheets on Education Systems in Europe: England, Wales and Northern Ireland (last updated August 2001) www.eurydice.org/Doc_intermediaries/descriptions

11: Eurydice (The Education Information Network in Europe) (2000) Summary Sheets on Education Systems in Europe: Greece (last updated July 2000) www.eurydice.org/Doc_intermediaries/descriptions

12: National Statistical Service of Greece (2002) Education Statistics 1994/95-2001/02, Athens [in Greek and French]

⁵¹ The mainstream secondary schools include the following: 316 Middle deemed secondary, 145 Modern, 159 Grammar, 3 Technical, and 2,825 Comprehensive. In addition they are non-maintained mainstream, special schools (maintained and non-maintained), and pupil referral units.

⁵² There are also Nine 'Ecclesiastic' gymnasia.

Short discussion

The data above gives some information about the two contexts. An example is the 'size' of the two contexts, states and educational systems. On estimate, the people directly involved in education in England -students, teachers, administrators and public servants in compulsory and tertiary education- add up to a total that is greater than the population of Greece. If one compares this with the more or less similar actual 'size' of England and Greece, a number of 'questions' can be generated about the 'comparable' relation of the two contexts. It is interesting to add to that the geophysical characteristics of England and Greece, for example, the 'compactness' of the English 'land' to the few dozens of inhabited islands of Greece. In that sense, the data can be seen as an imaginative tool for 'reconstructing' the contexts⁵³.

However, the above data is also 'restrictive' because of the assumptions that underline them. These assumptions are value-based assumptions (e.g. of what is important to be recorded, what are the 'positive' trends), definition assumptions (e.g. what is (formal) education), methodological assumptions (e.g. how to make 'diversity' and 'difference' comparable), and so on. Thus, in order to read the data, one needs to keep in mind the framework in which it was collected and analysed. The data presented is from National, EU and OECD sources that have a specific comparative framework. If one reads the above data in relation to the

⁵³ The 'imaginative' power of numbers' comparisons is constructed in a specific knowledge context, a context that allows making sense of the numbers. For example, in the information given about the United Kingdom and Greece in the U. S. Department of State (Bureau of European and Eurasian Affairs), the United Kingdom is described as 'slightly smaller than Oregon' (U.S. Department of State, 2002a) and Greece as 'roughly the size of Alabama' (U.S. Department of State, 2002b).

following comparative framework, the data may tell a different 'story'. In relation to out-of-school children, UNESCO (2000) reports⁵⁴ that

Based on net enrolment trends, on a global scale the number of out-of-school children fell from 127 million in 1990 to 113 million in 1998. Ninety-seven of every 100 out-of-school children live in less developed regions and nearly 60 per cent of them are girls (approximately 67 million).

(UNESCO, 2000, p. 30)

If one 'compares' this with the school expectancy in Table 3a (see also footnote 29) where women have longer school expectancy than men, it raises questions about the gendered role of education in different contexts (and levels of education, e.g. participation at different levels of higher education).

Successive presentations: the 'dates' and 'events'

The previous presentation focused on the current situation in education. This presentation was necessarily an a-historical one that cannot explain how the two contexts came to be what they are. In this section, a presentation of the 'development' of the two contexts is attempted. It takes the historical approach of grand narrative based on important 'events' and significant dates.

This is a 'traditional' approach to history, but at the same time is a very helpful one in comparative terms because it 'simplifies' the complexity of history as it is constructed daily in different arenas. This approach selects the events that have been 'significant' in specific developments, and at the same time it divides history into the periods that these events refer to (periodisation). Thus specific

⁵⁴ It refers to primary education. In the United Kingdom 99.00%, and in Greece 98.50% of the 5 to 14 age group are in education (OECD, 2001).

events are seen as the end of an accumulating process or as the beginning of change. In that way, this approach focuses on change (especially change on a grand scale). The problem of periodisation in comparative education research is, as Phillips (1994) argues, that

If it [periodisation] is manipulated so as to provide more transparent grounds for rational comparison, then the historian of education is guilty of imposing a false construct on history, and that is not acceptable.

(Phillips, 1994, p. 271)

The following table presents important events in general and special education, and the general history of each country. The conventions used for this presentation are:

- A small number of events are given in each category. The reason for that is that the table aims to give an indication of events that can be used for understanding the contexts 'comparatively', rather than a complete catalogue of events.
- The starting point of the period covered is selected according to the history of formal schooling in each context.

England			Greece		
Special Education	General Education	General History	General History	General Education	Special Education
<p>[1760: Academy for the Deaf and Dumb in Edinburgh]</p> <p>[1791: School of Instruction for the Indigent Blind in Liverpool]</p> <p>1842: The Misses White Open School for Idiots in Bath</p>	<p>1833: Education Bill</p> <p>1836: Foundation of the University of London</p>	<p>c.1760s-c.1830s: Industrial Revolution</p> <p>1832: first Reform Act extends the franchise (50% increase in the number entitled to vote)</p> <p>1837-1901: reign of Queen Victoria</p>	<p>1821: War of Independence</p> <p>1828: Foundation of the Greek State</p> <p>1832: Otto is selected as the first king of Greece</p> <p>1844: Constitution</p>	<p>1822: First provision for free education for boys and girls</p> <p>1831: Riots in the Central School</p> <p>1833: Decree of Secretary of Education's responsibilities</p> <p>1839: Foundation of the University of Athens</p>	
<p>1867: Metropolitan Poor Act</p> <p>1886: Idiots Act (distinction between 'lunatics' and 'idiots')</p> <p>1891: First special schools for the 'feeble-minded' (London)</p> <p>1899: Elementary Education (Defective and Epileptic Children)</p>	<p>1861: Newcastle commission (elementary schools)</p> <p>Revised Code (payment by results)</p> <p>1864: Clareton commission (public schools)</p> <p>1868: Taunton Report (Endowed schools)</p> <p>1869: Endowed Schools Act</p> <p>1870: Elementary Education Act</p> <p>1895: Bruce Commission (secondary education)</p>	<p>1850-1890</p>	<p>1894: Bankruptcy of the State</p>	<p>1885: Abolition of fees for primary students</p> <p>1894: Law for the Curriculum for primary schools</p>	

<p>1903: Association of Teachers in Special Schools</p> <p>1907: College of Teachers of Blind</p> <p>1913: Mental Deficiency Act</p> <p>1929: Wood Committee</p> <p>1939: 17,000 children in state special schools</p>	<p>1902: Education Act</p> <p>1926: Hadow Report</p>	<p>1928: Voting age for women reduced to 21</p>	<p>1900-1940 First World War</p> <p>1914-1918: War</p> <p>1927: German Economic Crisis</p> <p>1929: USA Economic Crisis</p>	<p>1912: 1st Balkan war</p> <p>1922: Greek defeat in Asia Minor (followed by the exchange of population and 1.3 million refugees in Greece in 1924)</p>	<p>1913: Law for the Primary Curriculum</p> <p>1914: Law for the Secondary School Curriculum</p> <p>1917: Education Reform</p> <p>1929: Education Reform</p> <p>1937: Secondary Education Law</p>	<p>1906: First special school for the Blind (private initiative)</p> <p>1923: First special school for the Deaf (private initiative)</p> <p>1937: Educational Bill with reference to special schools.</p> <p>First special school of Athens</p> <p>First special school for children with physical disabilities (private initiative)</p>
<p>1944: The Education Act extended to 'all children'</p> <p>1945: The Handicapped Pupils and School Health Regulations (11/10categories)</p>	<p>1938: Spens Committee</p> <p>1943: Norwood Committee</p> <p>1944: Education Act (tripartite system of Secondary Education)</p>	<p>1947: Independence for India and Pakistan</p> <p>1948: The National Health Service comes into operation</p>	<p>1940-1960 Second World War</p>	<p>1939: Italian invasion</p> <p>1941-1944: German occupation</p> <p>1946: Greece reaches its current size</p> <p>1946-1949: Civil War</p>		<p>1951: Law (905/51) for the education of the Blind</p>

<p>1978: The Warnock Report (integration, special educational needs)</p>	<p>1965: Circular 10/65 (Comprehensive Education) 1967: The Plowden Report (Primary Education) 1973: Leaving age raised to 16 1976: Education Act (Comprehensive Education) 1979: Education Act (repealed the 1976 Education Act)</p>	<p>1973: UK enters the European Community 1979: Conservative Party Government</p>	<p>60s-70s</p>	<p>1967-1974: Dictatorship 1974: Referendum resulted in the rejection of the monarchy</p>	<p>1964: (Law 4379) for the organisation and administration of Education 1967: Abolition of the Law 4379 1976: Education Reform (Law 309/1976) [nine years compulsory education, 'Demotike' as the language of instruction]</p>	<p>1969: Special Education Office in the Department of Education 1974: Constitutional recognition of the rights of 'defective' children 1975: Committee for Special Education</p>
<p>1981: Education Act</p>	<p>1980: Education Act (Assisted places scheme) 1984-1986: Teachers' dispute 1986: Education Act (governing bodies of school) 1988: Education Reform Act (National Curriculum)</p>	<p>1982: Falklands War</p>	<p>80s</p>	<p>1981: Greece joins the European Community 1981: First Socialist Party (PASOK) Government</p>	<p>1985: Education Reform (Law 1566/85)</p>	<p>1981: First Law of Special Education (Law 1143/81) 1985: Incorporation of Special Education in the framework of General Education 1988: 'Supporting Education' (1824/1988)</p>

<p>1993: Education Act (Special Educational Needs Tribunal) 1994: Code of Practice on the Identification and Assessment of Special Educational Needs [1995: Disability Discrimination Act] 1997: Excellence for all Children: Meeting Special Educational Needs [1998: Human Rights Act] 2001: Special Educational Needs and Disability Act</p>	<p>1992: White Paper: Choice and Diversity 1996: Education Act, and School Inspection Act ("Consolidation" Acts) 1998: The School Standards and Framework Act (Community, Foundation, Voluntary controlled/Voluntary aided schools)</p>	<p>1997: New Labour Government</p>	<p>90s-00s</p>	<p>1991: Resignation of the Ministry of Education after opposition and students' activism to proposed Presidential Decrees 1997: Reform of non-compulsory secondary education (Law 2525/97) [including also legislation on teachers' evaluation]</p>	<p>2000: Special Education Law (2817/2000)</p>
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Table 8.4: Dates in general education, special education, and general history of England and Greece

Notes: Sources

General Education (England): McCulloch, 1998; Carr, and Hartnett, 1996; Simon, 1994, 1960; Silver, 1980.
Special Education (England): Copeland, 2001; D. Armstrong, 1998; Cole, 1989; Hurt, 1988; Ford, Mongon, and Whelan, 1982; Tomlinson, 1982
General Education (Greece): Ifanti, 1995; Solomon, 1992; Bouzakis, 1991; Dimaras, 1990a, 1990b; Tsoukalas, 1987.
Special Education (Greece): Vlachou-Balafouti and Zoniou-Sideris, 2000; Zoniou-Sideris, 2000a, 2000b, 1996; Stasinou 1991.

Short discussion

An initial reaction to the table above is that its limitations are more obvious than the ones of the 'figures' tables. This table is more complex to read and at the same time the information seems insufficient because something is always omitted. What exactly is the content of each Act, what was the public debate that took place around it, what was the reaction to it, and if and how was it implemented are some of the questions that are left unanswered. For example in Greece from the beginning of state schooling until the late 1980s, the Ministry of Education and Religious Affairs has had 228 different Ministers, and they held their office on average for about seven months (Dimaras, 1990b; Saitis, 1988). This fact relates to the socio-political instability of Greece in most of that period and of course has affected the power of successive Governments to implement their reforms.

In addition this table, as a list, is also externally incomplete because the categories used omit a number of events that have influenced what education is in each country. For example, the developments of the Grand narratives of Darwin's theory, Pinet-Simon intelligence tests, Piaget's development theory, Fröbel, Montessori, Dewey, and Decroly's (amongst others) developments in education and pedagogy, and how these influenced notions of childhood and education, are all missing for the study. Moreover, this table presents a 'general', mainstream history of education, which does not allow for alternative readings (for instance, see Gomersall, 1994, for a history of English education and gender).

Finally, this table is completely void of any historical 'empathy'. Struggle (in educational and social arenas), the actual implications of war, achievements,

development, and the experience of educational and social exclusion and so on cannot be accommodated in this type of presentation.

The table is a 'list' and it has to be used as such. It can be used as a 'reminder' of the main events; it can also give some indication of interconnection between events. Its more important use however is as a 'backbone' around which a 'story' of education can be built.

Successive presentations: The theoretical framework

This section aims to present a theoretical framework that can be used in understanding the 'stories' of education in England and Greece. This framework explores *the purpose of education and schooling in relation to citizenship and knowledge* and how this has led historically to different exclusive/inclusive processes. In the previous two presentations England and Greece were discussed separately, something that was accentuated by the use of tables. This presentation however discusses them simultaneously.

General Education

Table 8.4 above presents education from the 19th century onward. Mass schooling (formal state educational systems) appeared in most Western countries at that period. Soysal and Strang (1989) argue that researching the beginning of mass education is important because at that point in the history of education, mass education was not taken for granted. In both contexts there was educational

provision before the 19th century (public schools, church schools, independent schools as well as the old Universities of Oxford and Cambridge in England, and church and community schools in Greece). However, a big difference between the two countries is that the war of independence in Greece resulted in the dismantling of the existing educational network and in what Tsoukalas (1987) calls the 'year zero' in the history of the Greek education - the period around the foundation of the new independent state.

In the first half of the 19th century England was the leading industrial country in the world, with a growing population, a new complex social structure, and a strong presence in the trade, diplomacy and colonial order of the world. At the same time the conditions of working and living for a large part of the working class (including working children and young people) were of a low standard and there was a general dissatisfaction among the working class due, amongst other things, to their exclusion from the franchise.

On the other hand, Greece was a new state that previously had been part of the Ottoman Empire for almost four centuries. The new state was small (47,515square m⁵⁵), with the majority of the population identified as Greeks living outside its boundaries. The economy, based mainly on agriculture, had suffered from years of war and heavy national debts, and there were no established socio-political structures to replace the old ones, nor even a common official language. At the same time, despite the disillusionment of the 'partial'

⁵⁵ Greece's northern boundary, at independence, extended from the Gulf of Volos to the Gulf of Arta. The Ionian Islands were added in 1864, Thessaly and part of Epirus in 1881, Macedonia, Crete, Epirus, and the Aegean Islands in 1913; Western Thrace in 1918 and the Dodecanese Islands in 1947.

success of the war of independence and the civil war of 1822-1823, Greece was finally an independent state.

Each country thus had different 'needs' that its educational system had to fulfil. These 'needs' refer to the different purposes of education. Education is multi-purpose; its social aspect increases social cohesion and regulates relations between individuals, families, social classes and the state; its political one ascertains notions of citizenship and nationhood; the cultural one transmits what constitute (general and technical) knowledge and notions of culture, and the economic one (re)produces the workforce needed.

All these purposes of education are interrelated and at the same time are contested. Different groups have different interests in education and different levels of power and influence with which to realise their goals. Historically, education has been the arena of struggle for defining and realising how society should be. Thus education is the result of ideological struggle and it produces ideology in implementing its purposes.

Comparing the development of English and Greek educational systems, one can become 'lost' in their differences. Ideologically the English system, according to Carr and Hartnett (1996), was based on a liberal democracy model that emphasized "the need to educate a new elite so as to ensure that the liberty of individuals would remain protected from the dangers of an ignorant and uneducated majority" (p.67). This resulted in a decentralised, selective system across and within types of schools, providing differentiated knowledge, and controlled social mobility (see McCulloch, 1998).

The Greek educational system, on the other hand, was more concerned with establishing a national identity and it was seen as “a tool for forging a particular type of national identity and for shifting loyalties and orientations from the local or regional periphery to the national centre” (Mouzelis, 1990, p. 124) This resulted in the early setting up of a centralised system, with mainly one route of education open to ‘all’ (or a large number of children), with centrally controlled curricula that allowed (in theory) a degree of social mobility.

If one stops here for a moment and reads the last few paragraphs, the implicit comparative framework that is evident in the description will be noticeable. This description refers to the 19th century with the knowledge of what happens after in the ‘story’. This presentation is not so much about the contexts at the time that educational systems were initially developed, but rather about what in retrospect can be seen as important in how they came to be what they are now.

In addition, implicitly in this framework are assumptions about the lost ‘possibilities’, the stories that were not to happen, or what Dimaras (1990a, and 1990b) calls in relation to the history of Greek education, the ‘Reform that did not happen’ and what R. Williams –possibly more optimistically- calls ‘the long revolution’. The ‘differentiation’ of the English system, and the ‘uniformity’ of the Greek system are characteristics that are still present in each – a part of their tradition and identity.

Special/Inclusive Education

However, the picture is more complicated when one tries to incorporate special/inclusive education to the above discussion. It is possible to identify a number of common characteristics such as the early private/charity provision for special education; the different development of the provision for sensory and physical disabilities, to that for learning disabilities (with medical and 'rehabilitation' models being predominant in the former, and psychological and educational models in the latter); and the 'grey area' between special and mainstream education of children of 'low ability'. However, these commonalities (see for instance, Ainscow, 1999; Ford et al., 1982) are outnumbered by the differences of special/inclusive education in the two contexts. These differences are so great that statistical comparisons between the two systems are more or less meaningless because there is no common starting base for what is compared.

In order to understand this, we need to question the significance of the similarities of the two special educational systems. Instead of defining them as similarities between the two systems, it may be more appropriate to see them as originated outside the systems, part of an international discourse of 'special education' that has influenced both systems. Cole (1989) argues that even before 1900 an 'international' exchange of ideas in special education was taking place, and developments in special education elsewhere, especially in America and Europe influenced developments in Britain. The same is true for Greece as well, with many educators being themselves educated abroad. Thus Special Education can be seen as influenced by a 'borrowing' practice, facilitated by a common humanitarian and moral (mainly Christian) tradition.

Putting aside the similarities of the two special education systems, one is faced with their differences. A way of explaining these differences is to see them as the result of the particularities of each context. The idiosyncrasy of each context is evident in both general and special education.

However, since special education is always in the peculiar position of being relatively autonomous from general education, i.e. by being able to cater for its own school population; defined by general education, i.e. by having to respond to changes in general entitlement and provision; and interconnected with general education, i.e. by sometimes taking place within general education, then special education cannot be seen in isolation from general education (see, Sigman, 1987). Only by keeping special and general education together, one can understand why England had its first special education legislation at the end of the 19th century, and Greece almost one hundred years later. The following table gives some information about Special Education in England and Greece. It needs to be read with caution because the 'equivalence' of terminology, and the comparability of the data are even more problematic than the previous tables.

Table 8.5: Special Education in England and Greece

	Special Education in England	Special Education in Greece
Provision	In mainstream schools, whenever it is possible and according to the parents' wishes	In mainstream settings depending on the 'severity' of special needs
Categories	Umbrella category of special educational needs	Categories depending on the type of special educational need
Types of provision	<ul style="list-style-type: none"> • Integration in mainstream classes (with additional support) • Special units or classes within mainstream schools • Free-standing units • Special Schools • Education in hospitals • Home tuition⁵⁶ 	<ul style="list-style-type: none"> • Mainstream classes (with additional support, if needed) • Special classes • Special Education Schools (state and private) • School/classes in hospitals, rehabilitation centres and institutions • At home
Organisation	Local Educational Authorities are responsible for providing appropriate provision for children with special educational needs and for special schools. They are also responsible for co-ordination with other services (e.g. Health Authority) in assessing and meeting the needs of children.	Responsibility for overall special needs education provision lies with the Ministry of Education and Religious Affairs ⁵⁷ . In the Ministry there is a Special Education Directorate and in the Pedagogic Institute a Special Needs Department. Law 2817/2000 introduces 13 Special Education Districts which cover the whole country (these districts are larger than the

⁵⁶ For the complexity of the above categories, see Evans and Lunt (2002) who mention the following categories:

1. Part-time placements in special and mainstream schools
2. Outreach support from special schools to integrated pupils
3. Units or centres on the site of a mainstream school
4. Modifications to mainstream facilities
5. Additionally resourced mainstream schools
6. Supported placements in mainstream schools

Evans and Lunt, 2002, p. 6)

⁵⁷ Law 2817/2000 brings most of special needs provision under the Ministry of Education and Religious Affairs. However, up to present the Ministry of Health and Welfare has been responsible for institutions providing special education services and special schools (e.g. early years provision).

		prefecture-wide districts of primary/secondary education, see next chapter)
Identification and Assessment	The process of assessing children with special educational needs in mainstream schools is based on the Code of Practice. The revised Code of Practice (2002) reduces the stages of this process from five to four (School Action, School Action Plus, Request for Statutory Assessment, and Statutory Assessment).	The Law 2817/2000 introduces the Diagnostic Evaluation and Support Centres which are responsible for the diagnosis of special needs and the pedagogical support of special needs teachers
Number of students with special needs	Total number: 1,556,156 (estimate ⁵⁸ for 2001) 18.6% of the total school population SEN with statement: 258,200 (estimate for 2001) 3.1% of the total school population	Total number (in public schools): 15,415 (undated) ⁵⁹ 1.3% of the school population (1998) (including nursery education)
Number of students with special needs educated in Special education	Special schools: 91,000 Total /87,400 with statement Pupil Referral Units: 9,300 Total/1,800 with statements Non-Maintained Special: 4,600 Total/4,500 with statement	Special Schools (including pre-, and post-compulsory education): 4, 141 Special Classes: 11,274

⁵⁸ This is an estimate because 'the data for SEN are known to be incomplete'. In addition the changes in the SEN assessment process according to the revised Code of Practice has affected the number of SEN children with the provisional figure for 2002 being 1,448, 140 (DfES, 2002)

⁵⁹ This data originated from the Special Education Directorate (Source Eurydice, 2001). The National Statistical Service of Greece records for 1998, 16,174 students with special needs from which 2,539 were educated in Private schools.

The problem of 'equivalence' in comparative research in special education is reported in all the relevant literature. This becomes even more complicated when 'inclusion' is not seen as merely a 'special education' term. The OECD is developing an indicator that aims to overcome some of the conceptual problems of equivalence and to extend the concept of 'inclusion'. The basis of the indicators is any additional provision received by students over and above the general 'standard' provision, in order for them to access the curriculum.

Three cross-national categories of students receiving such provision are distinguished. Students whose needs are related to a 'substantial normative argument' (e.g. sensory disabilities, severe learning disabilities and multiple disabilities) belong to the first category. The second category includes students whose needs cannot be attributed to specific factors. Finally the third category refers to students whose needs are related to socio-economic, cultural, and/or linguistic factors.

This alternative way of constructing 'special/additional' provision is interesting because it extends the 'scope' of the field. At the same time it is problematic for a number of reasons. Firstly, the relation between 'needs', additional provision, and 'resources' is not a simple one. As D. Armstrong (1995) argues,

By defining children's needs in terms of resources those needs are individualized, inhibiting consideration of the context in which they occur, a context which includes the expectations and needs of those who request and carry out the assessment.

(D. Armstrong, 1995, p. 132)

Secondly, the location of provision of additional resources is closely related to the general context of education, e.g. the degree to which the general context

'allows' for differentiated use of resources. Finally, the comparability of the data presented under this indicator is problematic. For instance, Greece that, as is apparent from the above table, has a relatively small percentage of children 'identified' as having special educational needs, and where data are available only for students in special schools or classes, appears in the OECD additional resources indicator as having over 60% of disabled students in special schools. In addition, in Greece information referring to first category students in regular classes is presented under the 'special classes' heading. In England the opposite is the case, information about students in special classes is presented in regular classes data. Thus, supposedly the same combined information is given but in different places⁶⁰.

Returning to the schools, In relation to 'inclusion' the two schools can be described as follow

*English School*⁶¹ The intake of the school comes from wards, which are all above the national average in the social disadvantage measures. The number of students eligible for free schools meals is much higher the national average (around 40% of the school population). A statistically negligible proportion of students are from ethnic minority groups. More than a quarter of the students are in the Special Educational Needs register and around thirty students have a statement

⁶⁰ For a different categorisation see European Commission (2000) that distinguishes between 'one-track' category with integration provision (Greece is located in this category, 'two-track' category with two distinct systems –mainstream and special, and 'multi-track' category with a 'multiplicity of approaches to integration (the United Kingdom is located in this category). These categories are based on percentage of students educated in special provision.

⁶¹ This information is compiled from the school own publications, LEA data and two OFSTED inspections that took place approximately two years before and a year after the research. However, all information is given as an approximation in order to protect the anonymity of the school.

(mainly of Moderate Learning Difficulties, and of Emotional and Behavioural Difficulties and Specific Learning Difficulties). The school has a large special needs team comprising a SENCO, two special needs teachers and the full-time equivalent of four special needs assistants.

*Greek School(s)*⁶² Since I did not have access to the students' files, and statistical information by schools is not publicly available, the information that follows is based on the observations, interviews and discussions with the head-teacher and teachers.

The intake of the school comes from mixed socio-economic areas with a large lower middle-class population. Each form in the school has around four or five students from ethnic minority groups, in some cases more (with an average of 25 students in a form). Information about special educational needs is not available. However, in one of the schools in the staff-room, there was an A4 piece of paper on a notice board (in public view), listing the names of students that have been assessed as having dyslexia⁶³. Around ten names were on this list. Students assessed for dyslexia are the only students with identified special educational needs in the school(s).

Despite any efforts to make the above 'information' comparable, the differences in the ways that 'difference' is reported within the schools and the educational

⁶² Both schools have similar population composition.

⁶³ Assessment for specific learning difficulties (dyslexia) takes place in Assessment Medico-Pedagogic Centres that exist in each Local Educational Authority. Students can be referred to these centres on their parents' initiative, or after consultation with schoolteachers.

systems are apparent. In the next chapter the ways that 'inclusion' is constructed in the context of the two educational systems will be discussed.

Bringing the two contexts closer: citizenship and knowledge discourses

A way of bringing closer the two educational systems is to see their historical development as a continuous struggle of defining and re-defining the purposes of education. In this struggle different groups have different views about what education is (and means) and who is entitled to it. The historical evolution of this struggle is not a linear one, and at different points previous practices have been re-introduced. This struggle happens at all levels of the education arena and is not limited to policy (Fulcher, 1989).

This struggle can be seen as a struggle for *citizenship* and *knowledge*. Citizenship in this context is not simply the membership of a state, community or group, neither is it limited to rights, duties obligations and responsibilities⁶⁴. Citizenship is seen as a state and a process/practice (Isin and Wood, 1999; see also Taylor-Gooby, 1991, for a distinction between substantive and procedural approaches to citizenship) and education as one of the main sites where children and young people 'assert' and 'acquire' their citizenship identity.

In that sense a student's identity is partly a citizen's identity even though children and young people do not have all their political and social rights. The argument is

⁶⁴ Janoski (1998) discusses 'sanctions' in school in a citizenship framework of rights and obligations (in the USA context). It is interesting how the sanctions he mentions (e.g. positive sanctions: gold stars, right to use facilities, negative: sanctions: "after-school detention, expulsion from school, truant officers apprehending children who skip, and even courts punishing parents who fail to send their children to school" (p. 66)) are overwhelmingly negative. The negative sanctions are of the 'enforcing' type and separated from any educational/pedagogic discourse.

that children and young people are not 'pre-citizens' or 'citizens-to-be' but rather they are citizens with a specific framework (mostly restricted) of rights (Stalford, 2000). This needs a reconstruction of the variable of age and poses the question as Finch (1986) does "can age be said to *explain* social action?" (p. 19).

Defining schooling as a site where notions of citizenship are contested is very important for inclusion and exclusion. Firstly citizenship is about inclusion/exclusion, and as Bader (1997) argues, "citizenship always meant the exclusion of non-members" (p. 2) (for a discussion of citizenship rights and mental disabilities, see M. Barnes and Shardlow, 1996). Lister (1997) notes that

Critical citizenship theory has put the spotlight on the symbiotic processes of inclusion and exclusion which form the kernel of citizenship as a concept and a practice. Whether the focus is the nation-state or the community, or particular groups within these localities, boundaries and allocative processes serve to include and exclude simultaneously. Exclusion and inclusion operates at both a legal and sociological level through 'formal' and 'substantive' modes of citizenship.

(Lister, 1997, p. 43)

Using citizenship in understanding how processes of inclusion/exclusion operate also allows notions of childhood to be explored. Starting from the premise that childhood is socially constructed, then 'childhood' is not a fixed category and comparative research can reveal different 'childhoods' in different societies (James and Prout, 1995). In addition, James and Prout (1997) argue that

Children are and must be seen as active in the construction and determination of their own social lives, the lives of those around them and of the societies in which they live. Children are not just the passive subjects of social structures and processes.

(James and Prout, 1997, p. 8)

If we return to the discussion of school enrolment and school expectancy, we can see how school is one of the ways that influence different notions of childhoods

(its duration, boundaries and sites of social existence). The 'schooled child' (see James, Jenks and Prout, 1998; Hendrick, 1997; Jenks, 1996; Qvortrup, 1995) is the result of the expansion of schooling in the 19th century. However, this process cannot be seen as the same across contexts, for example the 'wage child' in the beginning of 19th century in England that Hendrick (1997) describes is different from the 'family-working child' that contributed mainly to the family's agricultural activity at the same period in Greece.

Another reason that citizenship can extend the discussion of exclusion/inclusion is because it goes beyond the 'individual'. Citizenship -as it is discussed here- does not refute the 'individual', but rather it sees the individual as a socio-political entity that develops and acts within a society. Society and State, of course, are not the same things. For example, the diversity of society may not always be acknowledged in the 'citizenship' discourse; aspects of this diversity have even been excluded and oppressed. Society and State inhabit however the same 'space' and come together (with the addition of notions of Nation) in educational systems and schools. The way students are defined as 'individuals' and 'citizens' in schools is central to exclusion/inclusion.

In relation to special needs for instance, individualistic models have been used to justify the segregation of students from mainstream education (Barton, 1993). As

Barton and Smith (1989) argue

The rights (as opposed to needs) of children who are deemed to have special educational needs are not considered in the matter of special education policy-making partly because they have the status of children. However, children considered to have special educational needs are doubly disadvantaged.

The relation between rights and needs is a complex one, and sometimes it is presented mainly as an issue of keeping 'needs' discourse in the context of 'rights' discourse (Oliver and Barnes, 1991). However, both rights and needs are used to justify inclusion/exclusion (Glendinning, 2000; Howe, 1996). Whose rights/needs, and at whose expense, are two questions related to the 'deserving' individual/group (the ones that are good/productive citizens). An example of that is the perception of some teachers that multiculturalism has meant that, "it is now the white students who feel the minority" (Yon, 1999). The same argument has also been applied to boys/girls, disabled/non-disabled students, students whose native language is different from the language of instruction/native speakers, and so on. These dichotomies are accentuated by having to compete for scarce resources, and by educational 'myths'. For instance, in this study a disproportional emphasis on boys' behaviour and ability has been found to dominate staff-room talk and classroom practices (for teachers' anecdotes about students and their 'social validity', see Cortazzi, 1993). This is backed-up with evidence from research, to create another 'crisis' of education, that 'equal opportunities' in favour of girls have 'failed' boys (see for instance, Holland, 1998). This argument implies that the right of participation is given to some groups with the proviso that the rights of other groups (and especially of the 'majority') are not affected (see for instance, Dessent, 1987). As Smith (1998) argues, "some of the rhetoric associated with inclusion concerning 'rights of the individual' has been construed by some professionals as 'incompatible with the common good'" (p. 164). This 'common good' is safeguarded by 'clauses of

conditionality' in the right of participation when the 'appropriateness' of participation is contested (Slee, 1996a; 1996b). On the other hand, a 'rights' position needs to be able to include the right of parents to send their children to special schools (Saunders, 1994) and the right of children to be consulted or at least to express their preferences (see for example the debate between Padelia, 1996; 1995 and Kusuma-Powell, 1996, see also Cook et al, 2001).

Exploring the everyday experience of students in schools from a citizenship discourse presumes that students are active in defining their rights and needs and will act upon their definitions. Students are seen then as social actors in the educational arena. However, the children's 'social role' may become a rhetorical one, if it does not acknowledge their 'power' in the educational arena. Moving from a strictly individualistic model to one that sees children's actions as engaging with their social environment from their own –individual and collective- standpoint (see Mayall, 2000), it might be possible to start constructing a notion of children's power that is not always contrasted with adults', and therefore seen as imperfect⁶⁵. Baron et al. (1982) define two types of struggles relating to schooling. The 'within' schools struggles where children and teachers are the main participants and the struggles 'over' schooling from which children are excluded (p. 26).

⁶⁵ An interesting example is Smith's (2000) categorisation of children as 'consumers', 'interpreters' and 'actors' and his definition of them either as 'temporal stages' or as 'developmental stages', replicating more traditional theories of children's development towards 'adulthood'. This notion of development is especially important for children with special needs who in some cases are seen as not able to reach the 'complete' level of 'adulthood' as defined by active citizenship.

The first type of struggle is seen as happening in a 'closed' environment and thus as not having any effect on the outside struggle, which is the one that changes education. In addition, children and young people are seen as not able to 'understand' what they are involved in. Thus their resistance is counter-productive, especially for themselves.

In the next chapters the ways that students understand and engage with their citizenship role in schools is discussed. This discussion does not assume that the students' notions of citizenship (as defined by their participation in schools) are necessarily naïve, incomplete, individualistic, or apolitical. At the same time, it sees them as constructed and contested within (and outside) schools.

The discourse of citizenship is related to the knowledge discourse. Sometimes these two discourses are separated in schools where the socialisation of students is seen as different from their learning. In the next two chapters it will be argued that school knowledge promotes both specific understandings of citizenship and specific knowledge that differentiates individuals/citizens.

In the Foreword of the *Excellence for all children* (1997) the then Secretary of State for Education and Employment David Blunkett states that

The great majority of children with SEN will, as adults, contribute economically; all will contribute as members in society. Schools have to prepare all children for these roles. That is a strong reason for educating children with SEN, as far as possible, with their peers. Where all children are included as equal partners in the school community, the benefits are felt by all. That is why we are committed to comprehensive and enforceable civil rights for disabled people. Our aspiration as a nation must be for all our people.

(DES, 1997, p. 4, emphasis added)

In the above extract participation in society and productivity are separated, by acknowledging that a small proportion of children with special educational needs potentially are not going to be economically productive, without this negating their social role in society. Abberley (1996) argues that the work-based model of social membership and identity

...allows for the integration of perhaps a substantial proportion of any existing impaired population into the social work process, but only insofar as the interface between the individual's impairment, technology and socially valued activity produced a positive outcome.

(Abberley, 1996, p. 74)

However, underlying this work-based model there is the assumption that impaired modes of being are 'undesirable'. Thus the separation of productivity and social participation is an artificial one, and disability continues to constitute 'otherness' and deviation from normality (see Kjellberg, 2002; Marks, 2001; Riddell et al., 2001; Corker, 2000).

Conclusion: Where are the 'stories'?

This chapter aimed to present the two 'contexts' of research, or at least to give the necessary information to the reader to 'understand' the schools where the research took place. The schools in this study can be seen in similar lines with what Wexler (1992) claims saying that "I extrapolate and ask that you imagine each of these schools as offering systematic insight, but not representative reproducibility, into other schools" (p. 115). I am not sure that the chapter succeeds completely in its aims. However, this chapter hopefully gives to the reader some 'tools' to construct an initial 'feeling' about the schools and to

imagine what happens in them. Different data have been used in order to construct a framework for understanding the two contexts. The tables included in this chapter can be seen as an attempt in social cartography where “the comparative researcher and the reader alike serve as translators within this mode of interpretive inquiry” (Paulston, 1999, p. 454).