



# **Inclusive education as ideology: A critical analysis of its pedagogical applicability**

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I, Jacobus Eduard Kok, hereby declare that this M study is my own work and that it has not been submitted to another institution for examination.

A handwritten signature in black ink, consisting of several loops and strokes, representing the name Jacobus Eduard Kok.

2021/12/10

## PREFACE

*“Oppression—overwhelming control—is necrophilic; it is nourished by love of death, not life. The banking concept of education, which serves the interests of oppression, is also necrophilic.”*

- Freire, *Pedagogy of the Oppressed*

Any reasonable person who is involved in education and academia has, or will, come to have that moment of realisation that the extensive, overbearing and negligent effort employed by institutions and ourselves to control our systems and, more distressingly, spaces of learning is exactly what stifles our passion for learning. Those who never suffer this moment, are surely these strangled ghosts that Fromm and Freire mention.

This was an arduous journey, a far longer route than planned, filled with disappointments and disillusionments. Freire’s word is a resounding warning for those that see, but do not succumb. Those that lie shattered next to the monolithic, lifeless, and mindless totem of order and control for its own end. What many today miss, in this contemporary world of self-interest and conspiracy theories and faux identities, is that the great grand masters of control do not exist. The death of creativity and passion for growth is at the hands of scared, darting-eyed husks that are just trying to grab and desperately hold onto the reins handed them.

We cannot not succumb, give into the stifling morass and leave the pieces lie. We must, and repeatedly will, pick up the scone and as true educators walk alongside the curious living to try and light the way.

My first words of gratitude have to go out to my father, who has not been among us for a decade now. Without his hard work and persistence, and what was unconditional love in the truest of words, I would not be here today.

The same holds true for my darling mother and ever supportive brother. My family, I will trade for nothing in life. You are my pillars. My foundation and shelter from the persistent storm. Thank you for the continued support and blind trust that I know what I am doing – which I most definitely don’t.

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To my colleagues (all whom I also consider friends), especially the last year, creating space for me to finally make this happen. Even putting up the fight in the background to make things happen for me. It is seen, it is greatly appreciated.

To the NWU, for taking a chance on me and providing the support to make it and my profession a reality.

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## **ABSTRACT**

Varying studies on inclusive education in South Africa indicate that the practice of inclusive education is contested by a section of the teacher population based on the premise of what inclusion means, or that the practice of such a pedagogy would hinder standard teaching practices. These occurrences can, at least in part, be explained as a consequence of inclusive education interacting with 'traditionalist education'. It is therefore a pedagogy of inclusion entering into the context of an established teaching environment with entrenched notions of teacher responsibilities and teaching practices, as well as what support and inclusion mean.

Both these pedagogies are founded in what Brantlinger identifies as ideological 'roots', convictions on an epistemic and ethical level that comes to define the pedagogical practice. By identifying diverse pedagogical frameworks as ideologies, these ideological roots can be laid bare, scrutinized and compared, in order to more accurately evaluate the ends of the particular pedagogical structure. This study endeavoured to highlight the competing ideological roots by means of reviewing the descriptions and views on inclusive education held by teachers, pre-service teachers and the lecturers of pre-service teachers. As a mixed methods study, a qualitative systematic literature review was utilized to identify key themes discernable from the views of in-service teachers on inclusive education. A self-constructed questionnaire was then developed based on these themes, to determine if pre-service teachers and their lecturers hold similar or diverging views. The derivable ideological roots of these key themes were recorded and compared in relation to Freire's banking education and critical education schemas, to further elaborate on the consequences and effects of endorsed ideological roots. By means of evaluating these underlying schemas, especially their ideological foundations and epistemic-, ethical- and ontological consequences, the benefit of examining pedagogical frameworks as ideologies were emphasized and viability of inclusive education for education in South Africa reinforced.

Inclusive education, traditionalist education, ideology, ideological roots, epistemology, ethics, systematic literature review

## OPSOMMING

Verskeie studies wat op inklusiewe onderwys se aanwending in Suid-Afrika fokus, dui daarop dat die toepassing van inklusiewe onderwys in die onderwyspraktyk deur 'n onderdeel van die onderwyserpopulasie teengestaan word op grond van wat inklusiwiteit vir hul beteken, of dat die aanwending van so 'n pedagogie tot die hindernis van alledaagse onderwyspraktyk sal lei. Hierdie verskynsels kan, ten minste gedeeltelik, verklaar word as die gevolg van die interaksie tussen inklusiewe onderwys met tradisionalistiese onderwys'. Dit is dus 'n pedagogie van inklusiwiteit wat die ruimte en konteks betree van 'n gevestigde onderwysomgewing met sy eie gevestigde idees rakende wat onderwyserverantwoordelikheid en onderwyspraktyke is, sowel as wat ondersteuning en insluiting beteken.

Beide hierdie pedagogieë is gevestig in wat Brantlinger identifiseer as hul ideologiese 'wortels', oortuigings op die epistemiese- en etiese vlak wat tot die omskrywing van die pedagogiese praktyk lei. Deur verskeie pedagogiese raamwerke te identifiseer as ideologieë, word hierdie ideologiese wortels uitgelig, ontleed en vergelyk – sodoende om 'n meer akkurate evaluering van die doelwitte van die spesifieke pedagogiese struktuur te doen. Hierdie studie is aangewend met die bedoeling om kontrasterende ideologiese wortels uit te lig deur middel van die ontleding van die beskrywings en interpretasies van inklusiewe onderwys soos deur onderwyses, voor-diens onderwysers en die lektors van voordiens-onderwysers verwoord. As deel van 'n gemengde metode-studie was 'n kwalitatiewe sistematiese literatuurstudie toegepas om kerntemas te identifiseer vanuit die perspektiewe omtrent inklusiewe onderwys gehou deur indiens-onderwysers. 'n Selfgekonstrueerde vraelys was ontwikkel vanuit hierdie temas, om sodoende vas te stel of voordiens-onderwysers en hul dosente soortgelyke of ander oortuigings rakende inklusiewe onderwys onderhou. Die ideologiese wortels van die temas afgelei kan word was gerapporteer en vergelyk in verhouding met Freire se bankonderwys- en kritiese onderwys-skemas, om verder te kon uitbrei op die gevolge en effekte van die ondersteuning van spesifieke ideologiese wortels. Deur middel van die evaluering van hierdie onderliggende skemas, veral hul ideologiese fondasie en die epistemiese-, etiese- en ontologiese gevolge daarvan, is die voordele omtrent die ontleding van pedagogiese raamwerke as ideologieë uitgelig en die waarde van inklusiewe onderwys vir Suid-Afrikaanse onderwys versterk.

Inklusiewe onderwys, tradisionalistiese onderwys, ideologie, ideologiese wortels, epistemologie, etiek, sistematiese literatuurstudie

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# CHAPTER 1 - INTRODUCTION AND RATIONALE

## 1.1 Background

During the course of the past two-and-a-half decades, the South African education system has undergone tremendous change in its approach to education, from the structure of content delivery all the way to broader social policies, such as those applicable to inclusion. This change is especially observable when comparing the dramatic shifts in curriculum approaches and the rapid formulation and implementation of far-reaching education policies since 1994. In 1994, the newly elected government took steps to abolish the former Apartheid education system and implemented the first steps towards a more democratised South African education system (Steyn et al., 2011). This endeavour took form in 1995 through the first official education policy process that would establish the National Qualifications Framework (NQF) and the South African Qualifications Association (SAQA) (Lemmer et al., 2012). These legislations and other policies, such as the 1996 South African Schools Act (84 of 1996), Education White Paper 6 (EWP6): special needs education, building an inclusive education and training system (Department of Education, 2001), as well as all curriculum policies, from Curriculum 2005 through to the National Curriculum Statements (NCS) and the Curriculum and Assessment Policy Statements (CAPS), were all developed with the inclusive ideals of democracy and multiculturalism in mind. This was done in an effort to establish an education system that resonates with the 'Unity in Diversity' slogan of the new South Africa (Steyn et al., 2011) and its strong emphasis on equality and human rights (Engelbrecht et al., 2013).

Although these developments allowed for the integration of previously neglected or newly developed education theory approaches, for example giving recognition to social constructivist or critical inquiry theories (Jacobs, 2011), it was an active approach to redress the former discriminatory pedagogy of the preceding political era (Higgs, 1999, 2003). Thus, a deliberate move away from the segregationist and intolerant Bantu pedagogy was made (Higgs, 1999; Steyn et al., 2011), towards a democratic pedagogy (Engelbrecht, 2006) where the very real barriers of social exclusion enforced in the education sector were to be recognised as such and consequently expediently addressed by the new democratic government.

This redress agenda demonstrates how formal education is not only recognised as a vehicle to influence society but is organised and executed in an attempt to give form to an intended society and to produce an envisioned citizenship (Halstead, 2010; Higgs, 1999). The redress agenda highlights two things regarding the relationship between South African society and its education system. First, it illuminates the myriad levels of social exclusion as an effect of the pre-1994



education system and its envisioned societal structure. Second, it shows how education is now used as a vehicle to address social divisions of the past and, as an end, develop a new society. In more abstract terms, it demonstrates the very narrow relationship between the endorsed philosophies/ideologies<sup>1</sup> of a particular society's pedagogy and the resultant form that society takes on or at least the values that it attempts to entrench. The social norms weaved in Apartheid education doctrines served to sustain a society of segregation and exclusion (Engelbrecht, 2006; Higgs, 1999); whilst the post-1994 approaches are an ethical response to create a more just and inclusive society<sup>2</sup> (Engelbrecht, 2006; Higgs, 1999).

The movement towards education redress was emphasised with the implementation of EWP6, to further align South Africa with the global agenda of inclusive education as stipulated in the 1994 Salamanca Statement and preceding debates and education policy agendas - such as the 1990 World Conference on Education for All (Swart & Pettipher, 2019). As Engelbrecht (2006) points out, the Report of the National Commission on Special Needs Education and Training (NCSNET) and National Committee on Education Support Services (NCESS)<sup>3</sup> placed the role that social and political processes within education played in excluding learners in stark relief and motivated a shift towards a systemic view regarding identifying and addressing barriers to learning. This view asserts that barriers to learning are not inherent within the learner alone but are a consequence of the interaction between the learner, the school, the education system and the broader social, political and economic context. This 'systemic view' is in accordance with the principles put forth in the Salamanca Statement (Engelbrecht, 2006) and are facets of the NCSNET/NCESS report that informed the formation of EWP6 (Department of Education, 2001). EWP6 echoes the Salamanca Statement's call for the concentration on the education of "all persons" (UNESCO, 1994, p. 13), and proposes an inclusive education system and ethos in order to achieve this end. Inclusive education is, therefore, educational reform that is considered an ethical adaptation of education to address previous patterns of exclusion - the Department of Education of South Africa going so far as to identify it as a cornerstone of a "caring society" (Department of Education, 2001, p. 10).

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<sup>1</sup> The distinction between philosophy and ideology is, in general, very vague and, depending on the source, the terms are used interchangeably (Barrow, 2010). This is due to ideology sharing a structure of convictions and arguments that is indistinguishable from what is considered to be a philosophical framework (Barrow, 2010). A clearer distinction lies in the societal and practical influences or ends that ideology aims to achieve - to be explored in this study.

<sup>2</sup> This is particularly apparent in the post-1994 focus on social justice and the formation of a 'caring and humane society' (Department of Education, 1997, 2001; Engelbrecht, 2006; Monyooe, 2005; Sayed & Vellanki, 2013)

<sup>3</sup> In the context of democratisation and inclusivity, aptly titled Quality education for all – overcoming barriers to learning and development.

Although access to education is a central concern for inclusive education, with an inclusive framework there is an attempt at an ethical response to exclusion in unison with a “progressive raising of quality in education” (Department of Education, 2001, pp. 11-12). The focus is, therefore, also on the imparting of a knowledge aspect of education practice, in particular the ‘mediation’ process of knowledge and teaching and learning sensitive to differing individual learning needs (Landsberg & Matthews, 2019). By taking all of the above into consideration, it follows that inclusive education endeavours to:

- Actively redress the long-term effects that previous segregating ideologies had on education;
- Include and motivate the social values of equality, human rights and human dignity<sup>4</sup>; and
- Promote a teaching practice and education system sensitive to diverse learning needs and that endorses diverse teaching practices.

The latter, being concerned with the distribution and creation of knowledge, reflects the epistemology of this pedagogical framework. In broader terms, epistemology is understood to be a field of inquiry into, or a subset of ideas concerning the dissemination and creation of knowledge (Steup, 2017). The epistemological view within inclusive education is an important one. It departs from the traditional mode of teaching and learning where knowledge was treated as a one-directional transference, defined by Freire (1993) as ‘banking education’, and adopts an epistemology that views knowledge as being a co-creational and context influenced, if not context-dependent, product. In contrast to the preceding education structure, then, inclusive education is a pedagogy that is sensitive to the diversity of people that forms a society, is supportive of an ethics of equity and human dignity, and purports an epistemology that recognises diverse learning needs and the role each party in the teaching situation plays in the construction of knowledge.

The shift of the South African education system towards inclusive education is, therefore, in a different set of words, the adoption of a new philosophy of education. As Higgs (2003) points out, the addressing of and pursuit to change the South African education system’s fundamentalist pedagogy is as much a philosophical endeavour as it is a political and social one. It emphasises the requirement of education to change beyond the structural level, by recognising the fact that true systemic change can only occur if our thinking about the system and how it fits together with our political and social aspirations changes, too. In the South African context this also connects with the idea that for a renewed and representative education system to exist, an African philosophy of education should also be embraced and considered a contributing resource (Higgs,

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<sup>4</sup> As expressed by Engelbrecht (2006), due to South Africa’s Apartheid past these values only became a national education concern post-1994, while these values were already entrenched within and by means of the Jomtien World Conference on Education for All (UNESCO, 1990), the Salamanca Statement (UNESCO, 1994) and other education policy agendas of the time.

1999; Lebakeng et al., 2006; Van Wyk & Higgs, 2004). An African pedagogy that endorses *ubuntu* as a social principle is apparent in the 'Unity through Diversity' approach within the post-Apartheid dispensation and, one can argue, in particular through the Department of Education embracing inclusive education. *Ubuntu* is a conviction of 'I am a person through other people', which is understood as an ethical concept where the self is an integral part of the whole and vice versa (Metz, 2011; Ramose, 2004). Applied as a principle in education it broadens the pedagogical concerns of education by determining that the self-worth of the educator, as well as that of the learner, is determined by the inclusion and acknowledgement of others.

These principles, such as self-worth determined by acknowledgement of the other, democratised education and epistemology, non-ablest agendas and similar value-laden principles, influence the practice of education. These principles form what Brantlinger, an influential scholar whose work on inclusive education practice and research contributed to the discourse on the role ideology plays in pedagogy, identified as the foundational convictions of ideologies that are applied in and even used to contest specific approaches to education (Allan, 2013; Brantlinger, 1997). For Brantlinger the ideological roots of education practice/policy, such as inclusive education, are of utmost importance, and it can even be considered 'dangerous' to design or engage in such practices without understanding its ideological roots (Allan, 2013). Conversely, then, practices such as inclusive education can thus be contested on grounds of education practices that are themselves not understood or properly scrutinised in terms of their ideological roots or consequences. For example, inclusive education can be contested in terms of it not developing the skill of applying mathematical theorems expediently, without questioning whether expediency in applying varying theorems in mathematics is truly an end that education should strive to achieve instead of, say, application in diverse contexts.

## **1.2 Rationale**

Studies focussing on the success of the implementation of inclusive education, or the willingness of teachers to endorse or apply it in schools, identify two repeating occurrences of interest that can be related back to ideological influencers. The first is varying definitions and accompanying practices of inclusive education that repeat or introduce new patterns of exclusion under the guise of inclusion (Murungi, 2015). The second refers to the dismissal of inclusive education on the grounds of it counteracting the ends of education practice (Meltz et al., 2014), in particular arguments that criticise inclusive education as disruptive to actual in-class teaching practice and the process of disseminating knowledge - for example, that it is too time-consuming to attempt inclusive education in science classes. The former endorses the ethical ends of inclusive education, recognising learners who experience barriers to learning as part of the school community and deserving of human dignity and education, but limits and even stratifies the

epistemological ends that inclusive education might achieve. For example, learners experiencing barriers to learning might be included in class or school, but are in designated 'special classes' or 'special learning programmes' (Nel et al., 2014; Ngcobo & Muthukrishna, 2011). In the latter occurrence, the ethics of inclusive education as an argument for its support is rejected and its epistemological possibilities are denied based on the premise that it counteracts the epistemological ends of education - for example, it might be argued that inclusive education is representative of the ethics of our society (Donohue & Bornman, 2014; Engelbrecht et al., 2013; Meltz et al., 2014), but places demands that cannot be met in the classroom or disrupts normal teaching practice (eg. De Jager, 2011; Oswald & Engelbrecht, 2011).

These 'failures' and counterarguments are based on primarily defining inclusive education by one feature of its role in education - its role in physically including all learners, irrespective of their potential barriers to learning, in our ordinary classrooms. As aptly stated by Pijl and Meijer (1997), claiming that just one or even two factors make up inclusion cannot only be considered erroneous, but, entirely unrealistic. According to Pring (2010) and Carr (2010) for any educational philosophy, theory or practice to be relevant and achieve the purported end of human flourishing, it must be designed to address the complex interrelated interaction between ethical, epistemological and social concerns. As mentioned above, when scrutinising inclusive education as a pedagogical framework we see it encapsulating these concerns and that it is not limited to, for example, only epistemological strategies or social concerns of physical inclusivity. It can, therefore, be argued that limiting inclusive education to the physical inclusion of learners in classrooms is a reductionist view of a multifaceted and comprehensive educational approach; a view that limits an educational strategy built upon significant ethical and epistemological premises to mere surface-level inclusion. It demonstrates a narrow view of the 'ideological roots' of inclusive education, whilst also neglecting to question the 'ideological roots' of the counterarguments and its related educational practices.

### **1.3 Purpose of the study**

A preliminary study of literature on inclusive education practice showed that, despite inclusive education being part of education policy within South Africa, educators contest the practice thereof along the lines of what could be considered ideological grounds (*cf.* 1.1; 1.2). The purpose of this study was twofold: First, to substantiate an argument for viewing pedagogy as ideology and use this view to elucidate the implications for education when specific 'ideological roots' are accepted, particularly in terms of epistemology and ethics in education. Second, to procure data on different parties responsible for the eventual implementation of inclusive education within the South African education system and determine what 'ideological roots' can be discerned from their views on inclusive education policy and practice. The researcher argued that identification

of inclusive education, and other forms of pedagogy, as an ideology reintroduced educators to its philosophical foundations or 'ideological roots'. A view of pedagogy as ideology elucidates two of the primary concerns of philosophy of education regarding pedagogy in general – its purported ethics and epistemology. This process of critical analysis of forms of pedagogy and its epistemological and ethical consequences was applied by Freire (1993) in his convincing and celebrated critical pedagogy. The researcher argued that an exploration of inclusive education along the same lines will serve to promote its strengths as a pedagogical approach; in turn promoting its applicability in contemporary education practice in general and, specifically, within the South African context.

This argument in favour of inclusive education was done by means of a critical analysis of the findings from an exploratory mixed methods study. By means of a qualitative phase, an exploration of literature was done with a focus on the application of inclusive education in contemporary schools, particularly in the South African context. This was done to highlight the arguments for the support and opposition of inclusive education in South African classrooms. A systematic literature review was the suitable approach as there are already extensive studies done on the attitudes and perceptions of in-service teachers with regard to inclusive education from which the "ideological roots" at play could be discerned (eg. Donohue & Bornman, 2014; Engelbrecht et al., 2013; Meltz et al., 2014; Nel et al., 2014; Ngcobo & Muthukrishna, 2011). A quantitative phase then followed, based on the findings made by the qualitative study, to determine whether current pre-service teachers and their lecturers hold similar or different positions with regard to inclusive education. Pre-service teachers and their lecturers were selected as they were the parties other than in-service teachers that influence, or would eventually come to influence, the implementation of inclusive education in terms of teaching practice. This study focussed on the practitioners directly involved in teaching practice and other inclusive education stakeholders, such as support personnel, headmasters and other organising bodies, were therefore not included. Findings in both these phases served as the context by which the ideological implications for both the support and opposition to inclusive education were discussed.

The qualitative phase, therefore, proposed to investigate the ideological rootedness of inclusive education and to determine to what extent these ideological roots are realised, misapplied, or contested according to the findings of articles examining the application of inclusive education in South African classrooms. The data procured from the investigation on the reaction and views of in-service teachers on inclusive education was used to design a questionnaire for further research into how inclusive education is understood by pre-service teachers and their lecturers. This questionnaire tested whether the latter hold a view of inclusive education that is sensitive towards

the implications of the ideological roots it is founded on, especially in relation to its epistemological and ethical premises.

#### 1.4 Problem Statement

Despite inclusive education being part of education policy within South Africa, educators contest the practice thereof along the lines of what could be considered ideological grounds (*cf.* 1.1; 1.2).

The question one can ask then is: How might our understanding of inclusive education as an ideology promote its application in the South African educational environment?

By identifying inclusive education as an ideology the philosophical premises<sup>5</sup> constituting the concept can be laid bare, thereby elucidating its societal, ethical and epistemological assumptions and consequences. The same can be applied to clarify the ideologies possibly preceding the counterarguments against the application of inclusive strategies. For example, one can argue that inclusive education motivates a learner-centred teaching approach where creation of knowledge should occur primarily within the bounds of the learner's specific learning needs (Landsberg & Matthews, 2019); as opposed to a teaching system that is primarily standardised, socially and pedagogically, to convey knowledge as a strict pattern of learn and recite without variance or concern of learner learning strengths. The former approach as ideology carries the convictions regarding education akin to the Freirean dialogue or critical pedagogy, where an epistemology of the creation of knowledge on the part of learner is supported (Freire, 1993)<sup>6</sup>. In the latter case, the teaching approach identifies a more static concept of knowledge, an ideology that purports an epistemology of transference where the learner is arguably disregarded in favour of teaching ends rather than learning ends (Freire, 1993), and where the ethics of educating is somehow bound to the act of transference rather than the learning of the learner per se. The argument then is that clarification of the assumptions forming the foundation of inclusive education practice will more clearly reflect the embedded and proposed ethical and epistemological values that present it as a valuable, and through the practice of ideological comparison possibly the preferred approach to teaching and learning.

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<sup>5</sup> Understood to be what is meant by Brantlinger referring to 'ideological' roots (Allan, 2013). Both philosophical premises and ideological roots refer to some foundational convictions that inform the ideology as a unit.

<sup>6</sup> For Freire liberating education has to be involved with *conscientização*, the humanising educative process that will enable the learner to perceive and act upon the social, political and economic foundations of their world (1993). This, however, requires the hierarchical structure of education to be collapsed and a recognition of the learner's contribution in knowledge creation and world formation (Freire, 1993). More on this and its analogous tenets in inclusive education will be discussed in the study.

Several studies have been done on inclusive education in the South African context that clearly indicate that there are ideological factors at play in its understanding and willingness in embracing it as pedagogical framework (Donohue & Bornman, 2014; Gous et al., 2014; Meltz et al., 2014; Naicker, 2006; Ngcobo & Muthukrishna, 2011). However, a clear study on how inclusive education could be considered an ideology or constitutive of ideological roots and what this might entail is not apparent. Moreover, although several articles indicate that there are concerns regarding the epistemological demands of inclusive education (De Jager, 2011; Meltz et al., 2014; Oswald & Engelbrecht, 2011), it is not clear to what extent these concerns follow from an accurate understanding of the epistemological practice of inclusive education or whether they are just subject to other ideologically rooted educational practices.

## **1.5 Research questions and aims of study**

### **1.5.1 Primary research question**

The critical question for this study was, therefore: How might our understanding of inclusive education as an ideology contribute to its pedagogical applicability within teacher practice and training in South Africa?

### **1.5.2 Secondary research questions and objectives of study**

The following secondary questions arose from this query:

1. How is the concept “ideology” defined and described in literature and how is it related to pedagogy?
2. How would an understanding of inclusive education as an ideological framework inform its epistemology and ethics in education?
3. How are those practicing and contesting inclusive education in the South African education system presenting and describing the ideological underpinnings of inclusive education?
4. What are the views of current pre-service teachers and their lecturers regarding inclusive education as an ideologically rooted pedagogy?
5. How do these positions relate to an understanding of inclusive education as an ideologically rooted pedagogy?

From the above questions the following objectives were identified:

1. To clarify the concept “ideology” from literature, and to use ideology as a tool to better understand the philosophical and direct educational implications of an endorsed pedagogy - especially relating to inclusive education.
2. To determine if and how viewing inclusive education as an ideological framework can contribute to understanding its ethical and epistemological implications.
3. To determine if in-service teachers hold a view of pedagogy that recognises it as an ideological framework and takes into consideration its ethical and epistemological implications. The epistemological and ethical implications that they ascribe to pedagogical practices will assist in determining the key ideological factors in service or in opposition of inclusive education.
4. To determine if pre-service teachers and their lecturers hold a view of pedagogy that recognises it as an ideological framework and takes into consideration its ethical and epistemological implications. The extent which they present similar or opposing epistemological and ethical implications of pedagogy as their pre-service counterparts, will further entrench or detract the identified ideological factors as key factors in service or in opposition of inclusive education.
5. To determine if a view of pedagogies as ideological frameworks can strengthen the argument for the application of inclusive education in the contemporary South African classroom.

## **1.6 Theoretical framework**

Paulo Freire's (1993) arguments on “banking education” and “dialogical education”, as expressed in his *Pedagogy of the Oppressed*, served as the theoretical framework that informed the critical analysis of the research findings of the mixed methods study. Freire's critique is a suitable theoretical framework for this study because of his systematic query of the epistemological and ethical implications of pedagogical practices, and eventual influence it has on the formation of the learner. This systematic query was emulated to investigate the potential ideological implications of the claims for the support and opposition of inclusive education as a pedagogical approach in South African classrooms.

## **1.7 Conceptual Framework**

The following key terms and phrases have been used to guide the study: inclusive education, as a pedagogical concept and practice; ideology, specifically pedagogy as an ideological framework



and the ideological roots of pedagogical frameworks; and epistemology and ethics as basic aspects of concern for education in general.

### **1.7.1 Inclusive education**

“Inclusive education” is the preferred term for an education system that presents a paradigm shift towards social inclusion; endorsing pedagogical methodologies and practices that embrace diversity, meet the needs of all learners and increase the participation of all learners (Ntombela, 2011). The guiding principle for inclusive education is that schools should accommodate all learners regardless of their potential barriers to learning (UNESCO, 1994). It is an educational framework that stipulates that the curriculum and pedagogical practices should be flexible and responsive enough to include all learners and to address all barriers that may influence teaching and learning (Department of Education, 2001).

### **1.7.2 Ideology and ideological framework**

An ideology can be understood as an explanatory system broader than a ‘school of thought’ (Barrow, 2010). It is a “system of representations” (Allan, 2013) that frames the way we view and understand the world. Depending on the context, ideology is used interchangeably with theory or philosophical perspective (Barrow, 2010). Although the concept is unclear in its definition, as part of an ideology there are specific philosophical convictions distinguishable that shape it as framework – such as matters concerning ethics and epistemology.

### **1.7.3 Ideological roots**

Ideological roots are Brantlinger’s description of the subset of convictions that form a person or group’s ideology (Allan, 2013; Brantlinger, 1997). These are the convictions that inform action and system design. For example, a conviction that inclusive practices constitute responsible citizenship will endorse inclusive teaching practices and structures.

### **1.7.4 Epistemology**

In broader terms, epistemology is understood to be a field of inquiry into a/or subset of ideas concerning the dissemination and creation of knowledge (Steup, 2017).

### **1.7.5 Ethics**

Related to morality and values. Systems of ethics are varied in terms of basic guiding principles but are all aimed at guiding us toward what “ought” to be or be done (Sockett, 2010).

## **1.8 Research methodology**

### **1.8.1 Research paradigm**

According to Ivankova et al. (2016), there are three general approaches for conducting research: quantitative-, qualitative- and mixed methods research. The design employed for this research study was an exploratory mixed methods design. In general, pragmatism is understood to be the best philosophical justification for mixed methods approaches, as it applies a 'what works best' strategy when engaging with research problems (Ivankova et al., 2016). Pragmatism accepts that there is no fundamental value difference with regard to quantitative and qualitative research methodologies so as to prevent compatibility (Ivankova et al., 2016), justifying mixed method approaches in general and allowing for an in-depth exploration into the research topic in this instance.

Maxcy (as cited by Ivankova et al., 2016) asserts that the research question in a mixed methods study is considered of more importance than the methods employed to answer the question or the philosophical views informing the differing methods of research, further justifying pragmatism as a guiding paradigm. By employing a mixed methods approach the researcher was provided with a more complete means of analysis of the research situation, as a combination of the qualitative- and quantitative methods are utilised. With a mixed methods approach the proposed qualitative methodology allowed for an overarching understanding of the research problem, while the quantitative methodology tested that understanding in a more immanent context.

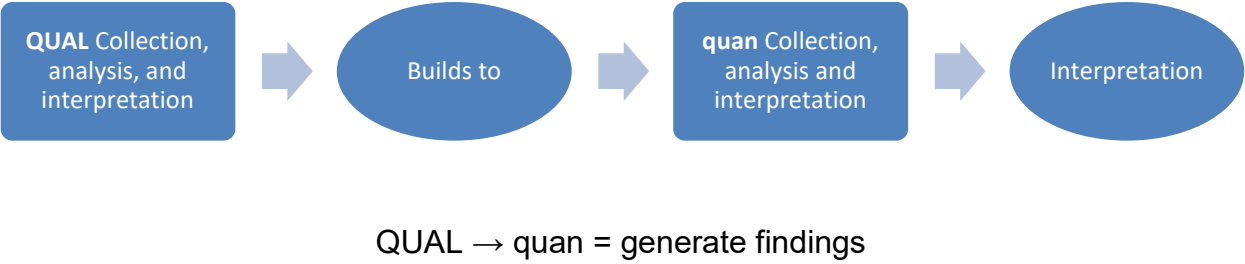
### **1.8.2 Research design**

According to Van Wyk and Taole (2015), mixed methods is a research design that makes use of both qualitative and quantitative methods for depth of understanding concerning the phenomenon under investigation. A sequential exploratory mixed methods design is used when qualitative data is accrued before attempting further quantitative testing or measurement (Van Wyk & Taole, 2015). In effect, quantitative results are, therefore, used to further build upon qualitative results (Mertler, 2016).

The primary focus point of this study was the understanding of inclusive education as an ideology in general and a review of research findings in light of such an understanding. The qualitative study, therefore, lent itself toward a systematic literature review (SLR) of existing literature for the purpose of critical analysis (*cf.* 3.2). An SLR can be described as a broader literature study where studies related to a specific topic are systematically reviewed for the critical analysis and synthesis of evidence related to the posed research question (Milner, 2015). In general, an SLR demands a strict protocol for study inclusion and data extraction (Bettany-Saltikov, 2010; Milner, 2015).

This, however, demands a clear delineation of the phenomena of interest that should also have had enjoyed attention from other researchers, from whose work the relevant data can be extracted. The SLR proposed in this study was for the express purpose to gain a broad enough view of studies done on the implementation of inclusive education, in order to determine how in-service teachers participating in these studies may be interpreting inclusive education on a philosophical/ideological level. The broader themes of interest for this study, as previously mentioned, are indications of differing definitions of inclusion that inform understandings of inclusivity and expressions of epistemological demands made by inclusion that cannot be met. Expressions referring to these occurrences are often found in the analyses of the authors or the comments of the respondents, and will, therefore, most likely be overlooked if one is to rely only on the title or abstract of literature for inclusion in the study. This study, therefore, made use of broader criteria for accumulating literature for review, rather than relying on single isolatable criteria such as whether 'ideology' features in the title or abstract. However, a SLR is an objective and transparent approach to research synthesis aimed at limiting potential bias (Bettany-Saltikov, 2010). In an effort to retain the rigour of the objective and transparent evidence of research as part of a SLR, a clear and detailed layout of the consulted research material along with clear descriptions of the themes, criteria, or indicators that were deemed relevant to the study, and why, was provided (*cf.* 3.2).

As part of a sequential exploratory mixed methods design, the findings from the SLR will serve as rich data for informing a consequential quantitative analysis of pre-service teachers and their lecturers' understanding of inclusive education and its ideological underpinnings. The qualitative research results were, therefore, used to formulate the quantitative study (Van Wyk & Taole, 2015). The sequential research process can be illustrated as follows:



**Figure 1-1: Exploratory Sequential Mixed Methods Research Design (Mertler, 2016)**

### **1.8.2.1 Literature review**

The researcher used the following keywords and phrases to guide the study and to obtain the relevant literature:

- Inclusive education
- Ideology/ideological framework/ideological roots
- Freire and dialogical- and banking education
- Epistemology
- Ethics

In order to compile the required literature for this study, the researcher consulted numerous academic sources, such as journal articles, published books, official documents and online academic articles. These sources will primarily be gathered by making use of the following academically relevant electronic databases: EBSCO-Host, Sabinet African Journals and Google Scholar.

### **1.8.2.2 Empirical study**

#### **1.8.2.2.1 Qualitative phase**

##### **i. Strategy of inquiry**

As mentioned above, the qualitative phase of this study was a systematic literature review. With an SLR the findings of several different studies are used to design a meta-synthesis of people's perspectives and experiences (Booth et al., 2016). In this phase, the focus was specifically on inclusive education and that which the in-service teachers perceive as its epistemological and ethical strengths and weaknesses.

##### **ii. Data collection method and instrument**

Cooke et al. (2012) suggest the use of the SPIDER (sample, phenomenon of interest, design, evaluation, research type) tool for qualitative-focussed systematic literature reviews. SPIDER is a search tool designed for qualitative research in particular, assisting with defining search terms and establishing a systematic search strategy (Cooke et al., 2012). In this study this tool was applied to systematically identify and apply the inclusion and exclusion criteria for studies to be included in the SLR. However, only peer-reviewed articles from accredited journals that were published after the implementation of EWP6 (post-2001) were considered for review. A manual search was conducted using the following search engines to acquire relevant articles for review: EBSCOHost, Sabinet African Journals, and Google Scholar.

### iii. Data analysis

The chosen protocols, search results, initial screening for inclusion, and eventual body of eligible research for review were reported using the PRISMA statement, the Preferred Reporting Items for Systematic reviews and Meta-analyses (Moher et al., 2009). The PRISMA statement is a guidance tool for ensuring quality reporting with regard to data gathering and synthesis in the case of SLRs (Moher et al., 2009). An analysis was done of the eligible articles and a synthesis of the information pertinent to answering the research question, specifically the sub-questions related to how inclusive education, and its ideological roots in ethics and epistemology, is understood by practicing in-service teachers in the South African school context (*cf.*3.2.2). These divergent definitions and ideological roots informed the themes for comparison when answering the research question, as well as functioned as the themes that formed the basis for the design of the succeeding quantitative phase of the study.

### iv. Quality criteria

Trustworthiness and credibility are the key quality criteria for qualitative research (Nieuwenhuis, 2016). Trustworthiness is vitally important for qualitative research and refers to “the acid test of your data-analysis, findings and conclusions”. (Nieuwenhuis, 2016, p. 123). According to Guba (as cited by Nieuwenhuis, 2016), there are certain criteria that should be considered when conducting a qualitative research in pursuit of a trustworthy study, namely: credibility, transferability, dependability and confirmability.

In terms of credibility, transferability and dependability, the SLR was conducted using the SPIDER tool, which gave a detailed account of the systematic procedure conducted in determining the research protocols, and the PRISMA statement, which provided a detailed illustration of the complete SLR process. Furthermore, credibility was further promoted through the use of thick descriptions of the phenomena being examined and the use of a quality criteria tool for assessing synthesised data (Nieuwenhuis, 2016).

In terms of confirmability, which deals with matters of neutrality and objectivity (Nieuwenhuis, 2016), explicit inclusion and exclusion criteria were provided to assess each potential contributing article by means of a quality checklist (Kitchenham & Charters, 2007). An independent researcher evaluated whether the protocol criteria applied to each potential contributing article, to ascertain the relevance and avoid researcher bias (Kitchenham & Charters, 2007; Nieuwenhuis, 2016).

#### 1.8.2.2.2 Quantitative phase

##### i. Strategy of inquiry

Whilst the critical analysis by means of the SLR allowed for elucidating the ideological factors at play in current inclusive pedagogical practice, the quantitative research phase was designed in light thereof to test whether similar ideological tenets are held by those undergoing and conducting pre-service teacher education. To this end the method of quantitative research employed was that of a non-experimental survey, a descriptive research technique where a survey or questionnaire is administered to a sample of individuals to ascertain their “attitudes, opinions, behaviours, experiences, or other characteristics of the population” (Mertler, 2016, p. 12). This technique was fitting for this study as it gave an indication of whether the sampled individuals in question held similar or different ideological positions regarding inclusive education compared to those of the in-service teachers identified in the literature researched in the SLR.

## ii. Sampling

The sampling method that was applied was that of non-probability convenience sampling. The purpose for this sample was to gain credible data from pre-service teachers and their lecturers. Due to logistical reasons, such as accessibility, convenience sampling was employed to select respondents as they were conveniently available at the higher education institution where the researcher was enrolled for the completion of this study (Maree & Pietersen, 2016a). The sample of pre-service teachers was fourth-year students enrolled at a specific university. The whole group of 300+ students (N1=300) were to be approached to partake in the research. A memorandum of agreement was reached with the lecturer of the enrolled fourth-year BEd students’ research module. The study was to be done in conjunction with the development of the student’s research skills and as an opportunity to partake in an actual research study as an example of how such research studies are conducted. Due to the Covid-19 pandemic and the subsequent lockdown of the country, this proved impossible. As a consequence, the strategy had to be adapted to an online survey. Due to these changes, the online questionnaire was shared with students on the online learning platform of their university, which yielded a far lower participation count than initially planned (N1=56). The sample for lecturers was significantly smaller (N2=40), as it included only lecturers of the same faculty, teaching at the same higher education institution, who were willing to participate. Due to the Covid-19 restrictions, their questionnaire was also adapted to be shared and completed electronically. The final participant count of lecturers was 17 (N2=17). The sample groups took part in the study in the same month, but on different occasions.

The rationale for the two different sample groups in the quantitative study was for testing for significant correlations or differing positions on the research topic between two parties involved

in the education system that have different levels of experience with regard to education practice and theory. Additionally, by including both lecturers and pre-service teachers in the quantitative study, rich data was obtained to compare with the findings made in the qualitative study and thereby further expanding on the findings made there.

### iii. Data collection method and instrument

The instrument used for data collection from both samples was a self-constructed questionnaire, of which the questions were designed based on the findings of the SLR. The themes derived from the data collected, analysed and interpreted in the SLR informed the design of the research instrument (*cf.* 3.2.3). The questionnaire items were the product of the thematic analysis. Both the sampled pre-service teachers and the lecturers were, therefore, to complete the same questionnaire, although on different occasions – seeing as the pre-service teachers were supposed to be approached during a scheduled class period, which was changed to an online participation in their own time; whilst the lecturers were approached on an individual basis via an email list provided by the Deputy Dean of the faculty. The questionnaire was designed in the form of a 4-point Likert scale, an ordinal measurement tool for measuring a respondent's attitude towards the event or topic in question (Maree & Pietersen, 2016b). The reason for a 4-point Likert scale was to avoid respondents from “hiding” through middle option selections (Maree & Pietersen, 2016b). The purpose of this instrument was to measure the correlation between the findings of the qualitative study and the position held by pre-service teachers and their lecturers. The time that was required for the completion of the questionnaire did not exceed thirty minutes. The timeframe and the viability of the items in the questionnaire were tested during the pilot study.

### iv. Data analysis

The collected data from the survey was statistically analysed and illustrated with the help of a qualified statistician. The data collected from the questionnaires was analysed and presented by means of descriptive and inferential statistics. Leedy and Omrod (2005) maintain that descriptive statistics are utilised to provide a summary of the general nature of research data, while McMillan and Schumacher (2010) assert that inferential statistics allows the researcher to draw statistically valid inferences from the data. These statistical strategies were represented numerically (mean, mode or median), thereby depicting the frequency counts and percentages obtained from the calculations of the statistician.

### v. Quality criteria

Maree and Pietersen (Maree & Pietersen, 2016b) describe the reliability of an instrument to mean that the same findings should be reached if the same instrument is applied to different respondents of the same population at different times. Reliability thus refers to the “extent to which

a measuring instrument is repeatable and consistent” (Maree & Pietersen, 2016b, p. 238). Reliability was ensured as the researcher made use of a qualified independent statistician to avoid research bias when handling and processing data. The validity of an instrument, however, refers to the extent to which the instrument measures what it is supposed to measure (Maree & Pietersen, 2016b). A pilot study was conducted with four respondents (three pre-service teachers and one lecturer) that share similar characteristics to the sampled respondents, but did not form part of the main research study. By conducting a pilot study, the research instrument was audited for reliability and validity.

Through the adoption of two research approaches, the trustworthiness of the data collected was ensured through triangulation – the reinforcement of research findings by means of different data sets (De Vos, 2005).

### **1.9 Data collection process**

The data collected for this study was collected by means of a mixed methods approach. In the qualitative phase, data on in-service teachers was collected by means of a SLR, by employing the SPIDER tool for determining inclusion protocols. Sequentially, the quantitative data was collected within a specific university from pre-service teachers and lecturers through non-probability convenience sampling.

The sequential exploratory mixed methods research study consisted of the following stages:

- An extensive literature study was done to clarify the concepts related to the overall study, such as inclusive education, ideology, epistemology and ethics.
- Qualitative phase: In conjunction with these clarified concepts, the SPIDER tool for qualitative systematic literature review procedures was used to identify the relevant research protocols to be employed in the SLR.
- As part of the SLR and qualitative phase, possible contributing articles was searched for and identified.
- Contributing articles were then selected after the application of the exclusion and inclusion protocols. The detailed procedure for exclusion and inclusion was illustrated using the PRISMA statement. The CASP tool was applied for the critical appraisal of articles.
- A meta-synthesis of in-service teachers’ perspectives and experiences related to the phenomena of interest in this study was composed and critically analysed. The quality and viability of the synthesis was promoted with the use of data extraction and a quality appraisal tool – GRADE-CERQual.
- Quantitative phase: As part of the quantitative phase, sampling of the pre-service teachers and the lecturers that were involved in the study was done.



- A self-constructed questionnaire based on the themes identified during the meta-synthesis was compiled.
- Permission was obtained from the ethics committee of the university responsible for low ethical impact studies (EduRec) and the Research Data Gatekeeper (RDGC) of the university.
- A pilot study was conducted with respondents that share similar characteristics to the sampled respondents who were not involved in the research study.
- The data collection instrument was modified as needed subsequent to the pilot study.
- With the help of an independent researcher, the survey questionnaire was distributed electronically.
- Informed consent and data were collected by means of the electronic surveys.
- Statistician analysed and interpreted data.
- Researcher analysed and interpreted the statistical data.
- Reported research findings and drew conclusions.

#### **1.10 Ethical considerations**

Ethical clearance for the proposed survey was sought from the relevant ethics committee, EducRec, at the higher education institute through which the study was conducted (see Annexure H). Once ethical clearance was obtained from the ethical committee of the university, the university Research Data Gatekeeper (RDGC) was approached for permission to conduct the study with students and lecturers of the institution (see Annexure I). The intended respondents were approached for voluntary and informed participation. Informed consent was required from each participant, where they had to agree to participate voluntarily in the research process (Mertler, 2016). Part of the voluntary structure of participation included the respondents being informed that they could withdraw from the research project at any point (Mertler, 2016). To eliminate possible bias, the recruitment of respondents, as well as the dissemination and collection of questionnaires and consent forms, were done by an independent researcher.

Before granting consent, potential respondents received a full and detailed explanation as to the nature and purpose of the research, as well as to what they were agreeing to when they took part in the research. An essential ethical aspect when doing research involving respondents is the issue of the protection of identities (Maree, 2016). Through the use of an online survey tool, respondents could take part anonymously and the identities of those taking part in the study and their results were kept confidential throughout the whole process.

## **1.11 Document outline**

The final outline of the document is as follows:

Chapter 1 – Introduction and Rationale

Chapter 2 – Literature Review

Chapter 3 – Overview of the Empirical Study

Chapter 4 – Data Analysis and Findings

Chapter 5 – Research Findings

Bibliography

Annexures

## **1.12 Conclusion**

In this chapter, the background, rationale and overall design of the study were described. It was argued that inclusive education is a key factor for education in South Africa, given both the history of exclusion in the country and the education policies developed to overcome those and other discriminations. In preliminary studies, it was found that the application of EWP6 and inclusive education was contested by educators based on factors that presented a mischaracterisation of inclusive education or just served to support the established norm for teaching practice. This contestation and mischaracterisation were argued to be the consequence of ideological factors. In light of this, a mixed methods study was suggested to accrue data on the views held by in-service teachers, pre-service teachers and the lecturers of pre-service teachers, to determine the extent and nature of the contestations to inclusive education. In the following chapter the background to inclusive education's development, the characteristics of inclusive education in general but for South Africa in particular, the ideological roots of pedagogies frameworks such as inclusive education, and the implication of ideological roots of these frameworks will be discussed.

## **CHAPTER 2 - LITERATURE REVIEW**

### **2.1 Introduction**

In this chapter, the development of inclusive education will be discussed in order to determine the central tenets that frame it as a pedagogical framework. The purpose of describing a pedagogical framework as an ideology will be explored, particularly to identify the relationship between ideological roots and the foundational epistemology and ethics of pedagogical frameworks. These ideological roots will be placed in the context of Freire's arguments on the division and implications of banking and critical pedagogy, so as to clarify the impact that these ideological roots of inclusive education and competing pedagogies hold for education in the broad. Finally, the rationale for an in-depth study on views of inclusive education, and the methods applied to accumulate the relevant and representative data, will be stated.

### **2.2 Development of inclusive education**

The following section focuses on the development of inclusive education on an international level, as well as within the South African context. Salient features such as the intention of international developments of inclusive education to promote human rights principles of education for all, and South African developments of inclusive education to address historical and continuing barriers to learning, are discussed in depth. The concept of barriers to learning is explored, with special attention paid to how conceptualisations of pedagogical frameworks could function as impediments to inclusive education practice.

#### **2.2.1 International development of inclusive education**

Historically speaking, education as a societal instrument for development has been plagued with patterns of exclusion. These patterns of exclusion ranged from exclusion for political control and securement of wealth, as seen throughout the first millennium AD as kingships and nobles instituted education institutions for control over their vassals (Kemmis & Edwards-Groves, 2018), to exclusion from equal access to education in the form of racial segregation in schools in the United States of America in the late 1800s and 1900s (Sunstein, 2004) and in South Africa during the Apartheid era (Engelbrecht, 2006). Access to quality education for the poor has been close to non-existent throughout history. Even the mass education implemented since the early 1900s that resulted in young people crossing the class divide could be viewed as empowerment that was more of an accidental consequence of schooling rather than an illustration of quality education provided, especially when taken into account that these forms of education were developed for the interest of the state and economy and not the interest of the development of

the learner (Kemmis & Edwards-Groves, 2018). The exclusion of women benefitting from education is a stark historical reality, with UNESCO reporting in 1994 that close to two-thirds of the more than 100 million children who did not receive primary education at that time were girls and the same ratio for women was seen in the 600 million illiterate adults (UNESCO, 1994). Those who were deemed 'disabled' were at best segregated when afforded any education at all (Barbara, 2018). The most influential and iconic blow to segregationist education in the West came through *Brown v. Board of Education*, where it was decreed that separate does not equate to equal and an across the board quality of education is a necessity (Barbara, 2018; Sunstein, 2004). Although this achievement would set the foundation for the improvement of access to quality education, it would still take decades of litigation to procure funding for education for those contending with disabilities and for policy development to strengthen the movement for inclusion of these learners in general education institutions (Barbara, 2018).

Several education theorists of the late 1800s and 1900s delivered serious criticism of public education for not being inclusive, especially in terms of not being representative of learners' needs for development to engage with their societal environment. John Dewey argued that a democratic education, an education system that could deliver active and empowered citizens, will only be a consequence if the participants in the very system are represented (Noddings, 2007). Paulo Freire argued that the existing education systems represent the interests of the state and not those of the learners, thereby continually disempowering and excluding learners from education that should empower learners (Skinner & Bromley, 2019). Jean-Ovide Decroly expressed two criticisms shared by inclusive education arguments – that co-education of 'normal' and 'awkward' learners are possible and pedagogically productive, and that society and educational institutions play a significant role in exacerbating learner limitations and often are the dominant barriers to learning (Dubreucq, 1993; Van Gorp, 2005). Through his experimental schools, established in the first decade of the 1900s, Decroly proved that learners who are described as expressing 'mental irregularities' are capable of achieving nearly the same rate and level of educational outcomes as their 'normal' peers (Dubreucq, 1993). The intervention to deliver such outcomes were adaptations of education systems, such as the curriculum, classroom factors and pedagogical activities (Dubreucq, 1993; Van Gorp, 2005). Decroly's first established school was akin to special needs schools established in the latter part of the 1900s, schools for those learners that were medically evaluated to be different from their 'normal' counterparts (Van Gorp, 2005). However, the successes he achieved stimulated public requests for a school that would employ the same pedagogical strategies, education modalities tailored to the learner's individual development, for 'normal' learners (Van Gorp, 2005). Much to the chagrin of conventional education practitioners of the time, Decroly developed pedagogical strategies and opportunities for learners of both schools to learn together (Dubreucq, 1993; Van Gorp, 2005). These strategies proved

educationally productive and proved learners from both spheres could be educated together to the benefit of all learners without sacrificing learner educational development (Van Gorp, 2005). Decades prior to the establishment of universal human rights that established each individual's right to education or the development of inclusive education practice theory and policy, Decroly illustrated the efficacy of inclusive education as a pedagogical strategy in general and as a means to address individual learning needs.

The development towards inclusive education has been an international focus in the past few decades. Inclusive education, as a pedagogical and philosophical framework, implemented as a global agenda (Pijl & Meijer, 1997), is rooted in the Universal Declaration of Human Rights (UDHR), formulated in 1948 (UN General Assembly). One of the stipulated fundamental rights in the UDHR, which is obviously connected to education and consequently historically influenced further developments in education as a global pursuit, is article 26 that emphasizes the right to education for every individual (UN General Assembly, 1948). In 1990, UNESCO hosted the World Declaration on Education for All (WDEA), in Jomtien, Thailand. The WDEA was a response to the reality of 'education for all' not having been achieved in the years following UDHR, especially not in a global sense (UNESCO, 1990), and was reaffirmed in 2000 by The Dakar Framework for Action - Education for All: Meeting our collective commitments (UNESCO, 2000). A salient feature of the WDEA, prefaced as a founding cause for the conference, is the staggering number of children excluded from primary schooling (UNESCO, 1990). This statistic, at the time recorded as more than 100 million children (UNESCO, 1990), and 10 years later in the Dakar Framework as 113 million children (UNESCO, 2000), represents how deeply set a reality exclusion was with regard to education.

A noteworthy element of the WDEA, especially in the context of inclusive education, was the participants undersigning the promotion of quality education for all (UNESCO, 1990), thereby starting the discourse on the right to education for all regardless of individual difference. Both these declarations, the UDHR and WDEA, therefore address, through stipulated rights and signed commitment, the exclusion of individuals from receiving an education. This rights-based argument for inclusion addresses the education system's role in preventing and securing access to learning.

In 1994, the Salamanca Statement and Framework for Action on Special Needs Education (SSFASNE) was drafted as an outcome of the World Conference on Special Needs Education: Access and Quality (UNESCO, 1994), furthering the ideas of educational redress by focussing on individuals excluded due to unique barriers to learning – discussed in terms of 'special needs' with regard to learning. Part of this focus on unique barriers was the increased attention to the repeated patterns of exclusion as a result of perceived learner (dis)abilities. The rights of the 'disabled' were therefore brought to the fore and the undersigning nations at the conference

agreed to systemic and policy developments that would combat exclusion and promote access to education (UNESCO, 1994). Both in terms of the historical development of education policies and its focus on the myriad of ways exclusion is repeated based on the fact that learners differ, on individual and group level, SSFASNE is referred to as the foundation of inclusive education as an international education approach (Ainscow & César, 2006; Nel et al., 2016; Swart & Pettipher, 2016). In 2006, the United Nations Convention on the Rights of Persons with Disabilities (CRPD) was undersigned by the majority of the countries of the world, further entrenching inclusive education as a whole-system approach for delivering an education for all (Abdulrahman et al., 2021; UN General Assembly, 2006). In 2016, the General Comment 4 published by UNESCO (2016) further elaborated on the key aspects of the SSFASNE and left in no uncertain terms what was meant by inclusion for all (Abdulrahman et al., 2021), although primarily drawn in the context of the recognised responsibility of attending to the historically and contemporary neglected populace of learners with disabilities.

The special needs that SSFASNE focussed on are described in South African literature as barriers to learning<sup>7</sup> (De Jager, 2011; Donohue & Bornman, 2014; Dreyer, 2017; Engelbrecht et al., 2013; Gous et al., 2014; Nel, 2015; Nel et al., 2014; Nel et al., 2016; Oswald & Engelbrecht, 2011; Swart & Pettipher, 2016). The introduction and standardisation of addressing special needs as barriers to learning in the inclusive education context follow the work of Booth and Ainscow in their development of an Index of Inclusion for the UK - described, in part, as an attempt to break away from the narrow and medicalised view of special needs towards a broader understanding of inclusion (Booth, 2011; Booth & Ainscow, 2002). A salient aim within SSFASNE is to provide education to learners who experience barriers to learning within the regular education system (UNESCO, 1994). Brantlinger posits that since the 1950's the diagnoses of disabilities and categorisation of learners as disabled increased dramatically and the immediate consequence of this was a growing number of learners enrolled for specialised education other than in the mainstream schooling sector (1997). It is within the context of this proliferation of diagnoses and categorisation of disability and consequent stratifying of learners, including the mass exclusion from education in general of people with diagnosed and obvious physical impairments (Ainscow, 2016; Nel et al., 2016; Swart & Pettipher, 2016; Tomlinson, 2015; UNESCO, 1994), that SSFASNE can be framed.

The call of SSFASNE was for governmental structures and education, in general, to promote change within education so as to accommodate learners who experience barriers to learning

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<sup>7</sup> Barriers to learning are factors that are considered to impede learning and are divided into intrinsic and extrinsic barriers to learning (Nel et al., 2016). Intrinsic barriers are conditions within the person, such as physical impediments; and extrinsic barriers are conditions located outside of the person, such as social structures (Nel et al., 2016).

(UNESCO, 1994), thereby highlighting the systemic nature of the problem and its intended basis for the solution. Systemic exclusion in the context of barriers to learning is in great part ascribed to the medical deficit model for understanding disability (Ainscow, 2007; Nel et al., 2016). The primary issue with the medical model is that it sets a norm or standard in terms of what human beings are, from which deviation equates disability and abnormality (Nel et al., 2016; Slee & Allan, 2001). As a rigid binary of description, normal or disabled, the medical model appears to be insensitive to the broad spectrum of barriers to learning, which is not always physical manifestations of impairments to the human body (Dreyer, 2017; Nel et al., 2016), and tend to neglect to account for human uniqueness and diversities in states of being. SSFASNE set its view of the ideal education system as one that achieves the opposite of promoting forms of discrimination and rather promotes education that is responsive to human uniqueness and supportive of individual growth and educational progress that will empower learners within their local environments (UNESCO, 1994). As a result, SSFASNE gives recognition that exclusion is not necessarily a consequence of innate causes on the side of the individual and that difference is exacerbated by systemic structures (UNESCO, 1994). SSFASNE (UNESCO, 1994) stipulates: “A change in social perspective is imperative. For far too long, the problems of people with disabilities have been compounded by a disabling society that has focussed upon their impairments rather than their potential” (p. 7). The General Comment 4 on the CRPD addressed this persistent issue of perspectives harming inclusion of learners and determined inclusive education as encompassing “a transformation in culture, policy and practice” for the accommodation of “the differing requirements and identities of individual students” (UNESCO, 2016: p.3). By addressing exclusion through support and development of potential on an individual level, the stratification of the medical model can be waylaid.

In order to meet individual educational needs, a key requirement is overcoming that which prevents education from occurring in general or entirely – in other words, addressing barriers to learning. By viewing issues impeaching learning as barriers allow for framing such issues, be they internally or externally originated, as obstacles that can be transcended. Initially, responses in favour of inclusive education and counteracting exclusion were focussed on physical exclusion only, be it specialised schooling structures or just access to existing general education structures (Brantlinger, 1997; Dreyer, 2017; Nel et al., 2016; Tomlinson, 2015). However, as taken up in SSFASNE (UNESCO, 1994), inclusive pedagogy is a pedagogy sensitive to special needs and aims at including all learners irrespective of their style or rate of learning within an inclusive school environment. This view on inclusive pedagogy broadens the purview of inclusive education from physical inclusion of learners to address the diverse educational needs of all learners (Kiuppis & Hausstätter, 2014).

'Barriers to learning' is a uniquely suited discourse for achieving the end of meeting the educational needs of all learners. Swart and Pettipher (2016) cite the report of the National Commission on Special Needs in Education and Training (NCSNET) and the National Committee on Education Support Services (NCESS), a commission and committee appointed by the minister of education in South Africa in 1996 for the express purpose of gaining an understanding of the nature and extent of barriers to learning within South Africa, in their definition of barriers as "those factors which lead to the inability of the system to accommodate diversity, which leads to learning breakdown or which prevent learners from accessing educational provision" (p. 19). In terms of such a systemic approach, barriers to learning are potentially experienced by all learners, as individuals and groups, in diverse ways (Booth et al., 2003; De Jager, 2011; Swart & Pettipher, 2016). These barriers might be internal or external in origin, and include the learner's unique environment, social- and familial systems, and individual psychological- and biological makeup (Department of Education, 1997; Swart & Pettipher, 2016).

The broader pursuit of education for all, whilst simultaneously taking into cognisance and addressing unique individual learning needs, is the foundation of inclusive education. Magnússon (2019) points out that within SSFASNE there is a tension between inclusion and special needs education. Based on the foundation of UDHR, the framework for inclusion is directed at all learners and education should be tailored to address individual learner needs and barriers (Göransson & Nilhom, 2014; Magnússon, 2019). However, the specific address for structural change of school practice is for the inclusion of the previously marginalised and the special needs education to address the needs of a 'special learner group' (Magnússon, 2019). The former constitutes the 'normative' framework for SSFASNE and inclusive education, whilst the latter is the specific political project for SSFASNE and special needs education (Magnússon, 2019). Special needs education is the term of reference used in SSFASNE for referring to the required educational approach for promoting inclusion (UNESCO, 1994). Although special needs education and inclusive education are used interchangeably, the term used for barriers to learning within the special needs education context, more commonly in international policies and academic publications, is that of "special educational needs"(SEN) (Nel, 2015). However, the term "special educational needs" have come under scrutiny in South Africa as early in the 1990s (Swart & Pettipher, 2016) – with the NCSNET and NCESS report recommending a move away from "special needs" as descriptor, due to the risk of reiterating the medical model tendency of shifting learning barriers as an inherent attribute of the learner (Department of Education, 1997; Nel et al., 2016).



## 2.2.2 Inclusive Education in South Africa

Pre-colonial sub-Saharan education was built upon indigenous knowledge systems and focused on development of intellectual, social and behavioural skills for community sustainability and cohesion (Abdulrahman et al., 2021; Naicker, 2018; Phasha & Condy, 2016). Referencing Ramose (Phasha & Condy, 2016), Phasha argues that pre-colonial South Africa was no stranger to inclusive education practices and that the ubuntu<sup>8</sup>-oriented approach was waylaid due to colonial influences. Inclusive education practices in South Africa would come to be further hampered by Apartheid education systems endorsing a rigid divide between special schooling, which primarily catered to a white populace, and mainstream schooling that was inherited by the new dispensation in 1994 (Swart & Pettipher, 2019). Due to the history of Apartheid in South Africa, exclusion from education, especially quality education when considering the abhorrent system of Bantu education, was of tantamount importance for the new democratic government to address (Engelbrecht et al., 2013; Higgs, 1999; Steyn et al., 2011). The social norms weaved in Apartheid education doctrines served to sustain a society of segregation and exclusion (Engelbrecht et al., 2013; Higgs, 1999). The post-Apartheid government was set the task of moving education away from the segregationist and intolerant Bantu pedagogy (Higgs, 1999; Steyn et al., 2011), towards an education system reflective of the newly endorsed democratic values and one that was accessible and responsive to all South African learners.

In the same year of the new dispensation taking power, South Africa was one of the countries that signed the Salamanca Statement and committed themselves to the inclusive education agenda (Engelbrecht, 2006; UNESCO, 1994). In 1996, keeping with the government's commitment to the Salamanca Statement and furthering their general pursuit of bridging the educational gap that affected the majority of South Africans, the education minister of South Africa appointed NCSNET and NCESS. For South Africa, it meant that formal steps were taken to extend the vision for the redress of education to include learners with special educational needs in the education system (Engelbrecht et al., 2013). NCSNET and NCESS, due to extensively shared findings (Department of Education, 1997), generated a combined report on the state of education with respect to learners with special education needs. One of their conclusions drawn were (Department of Education, 1997):

Acknowledging that 'special needs' often arise as a result of barriers within the curriculum, the centre of learning, the system of education, and the broader social context, it is

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<sup>8</sup> In *cf.* 1.1 a description of Ubuntu and relevance in South African society is given.

suggested that instead of referring to 'special needs' we should refer to barriers to learning and development (p.2).

Furthermore, the report suggested that all learners are possibly subject to some form of barrier to learning at some point of time and that a responsible education system should act to minimise, remove and prevent such barriers for effective learning to occur (Department of Education, 1997). The NCSNET and NCESS report, therefore, endorse the position that barriers to learning should be an education system problem and not considered an inherent characteristic of the learner that predicts their ability (Department of Education, 1997). Inclusive education is a pedagogical pursuit that is concerned with the quality of education of all learners – although it affords special attention to marginalised groups (Department of Education, 1997).

The insights brought on, thanks to the NCSNET and NCESS report, directly informed the formulation of South Africa's policy on inclusive education: Education White Paper 6 (EWP6): special needs education, building an inclusive education and training system (Department of Education, 2001). EWP6 framed the approach and ethos that the education system in South Africa would pursue onwards. As part of the endeavour for developing an education system responsive to learner diversity and unique learning needs, EWP6 confirmed barriers to learning as the preferred terminology instead of special needs, for inclusive education in South Africa (Department of Education, 2001; Nel, 2015). As with SSFASNE (UNESCO, 1994), EWP6 describes the practice of pedagogy to be a child-centred process that takes into consideration the barriers to learning that affect learners' learning (Department of Education, 2001).

Inclusive education enshrines the democratic values, such as its affirmation of protection of human dignity and advancement of human rights, of the post-Apartheid South Africa (Department of Education, 1997; Engelbrecht, 2006). As an educational reform that is considered an ethical adaptation of education to address previous patterns of exclusion, the Department of Education of South Africa goes so far as to identify inclusive education as a cornerstone of a "caring society" (Department of Education, 2001, p. 10). Although access to education is a central concern for inclusive education, EWP6 also calls for a "progressive raising of quality in education" – an overall improvement of teaching and learning in South African schools (Department of Education, 2001, pp. 11-12). Inclusive education in the EWP6-framework, therefore, requests inclusion both in the physical sense, promoting learner access to schools, as well as in the broad sense of responding to individual learner needs – the implication being that not only is presence in class sufficient, but teaching practice has to account for learner needs.

### 2.2.3 Inclusive education as pedagogical framework

Although there is broad consensus that inclusive education and the concept 'inclusion' is associated with changes in and of schools and education for all learners (Kiuppis & Hausstätter, 2014), the concept has been interpreted in different ways by theorists, policy-makers and educators. Kiuppis and Hausstätter (2014) identify at least three different ways that inclusive education is understood, namely:

- (a) Inclusive education as primarily concerned with people with disabilities included in mainstream schools or in an integrated setting.
- (b) Inclusive education as an education concern for the inclusion, development and achievement of learners, but especially those vulnerable to exclusion.
- (c) Inclusive education as a non-categorical approach and posits diversity as the starting point for education.

From this, we can glean that there is a diverse set of interpretations as to who inclusive education is focussed on and what its aims should be for the classroom and the school setting. Taking the development of inclusive education and its central focus on 'all learners' and their differences in learning into account (*cf.* 2.2.1), inclusive education as pedagogical framework covers the entire school-going populace. Classroom practice is also placed within its boundaries of concern with the connection made between inclusive education and child-centred learning (UNESCO, 1994) and admission that education should be sensitive to barriers to learning. The latter set the task of addressing barriers to learning, follows from the differing learning approaches and styles themselves being a possible barrier to learning if education practice is not conducted with it in mind (UNESCO, 1994). Inclusive education is therefore a pedagogical framework calling for both physical inclusion and a teaching practice of inclusion.

In terms of physical inclusion there are a variety of interpretations as to what education systems should achieve. In some instances, inclusive education is understood to entail a 'full inclusion' model, where all learners regardless of experienced barriers should be accommodated within regular schools (Bjarnason & Marinsson, 2014). Others view inclusive education as a semi-mainstreaming model - where schools become representative of their societies by including all learners within the regular school's grounds, but with allocated spaces and special classes for those who experience barriers to learning (Göransson & Nilhom, 2014). A third view of the purpose of inclusive education is to ensure specialised care for those with barriers to learning that prevent them from succeeding in regular schools, in other words bolstering the support for already existing special schools (Göransson & Nilhom, 2014). Slee (2014) argues that the Salamanca

Statement is enlisted by parties who support full inclusion<sup>9</sup>, as well as those who support sets of conditions for inclusion in regular schools. Considering the following statements within the Salamanca Statement (UNESCO, 1994), it is conceivable why both these positions on what inclusive education should entail are possible:

“The guiding principle... is that schools should accommodate all children...” (p.6)

“The fundamental principle of the inclusive school is that all children should learn together, wherever possible, regardless of any difficulties or differences they may have.” (p.11)

“Assignment of children to special schools – or special classes or sections within a school on a permanent basis – should be the exception...” (p.12)

Although mention is made of guiding principles and what factors are descriptive of an inclusive education school, the exact changes a regular school should undergo and the limits it is to apply for determining exceptions are not addressed in detail in the Salamanca Statement (Slee, 2014).

In the South African context, EWP6 (Department of Education, 2001) proposes a broader education system with various levels of support based on the variety of intensity of support learners might require. EWP6 describes three different school types, namely mainstream schools, full-service schools and special schools as resource centres, with support structures known as the district-based support teams (DBST) and the school-based or institution-based support teams (SBST) (Department of Education, 2001). Full-service schools are described as an in-between type of structure, a mainstream school environment that is “equipped and supported to provide for the full range of learning needs among all our learners” (Department of Education, 2001, p. 22). The premise is that all South African schools should adopt inclusive education, but that an education system could address different intensities of special needs. This approach reflects the World Report on Disability’s (World Health Organization and The World Bank, 2011) definition of inclusive education in the “broad sense”:

“...the understanding that the education of all children including those with disabilities should be under the responsibility of the education ministries or their equivalent with common rules and procedures. In this model, education may take place in a range of settings such as special schools and centres, special classes, special classes in integrated

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<sup>9</sup> Slee (2014) describes it as those who support what is “clumsily referred” to as ‘full inclusion’. By highlighting this ‘clumsy’ reference to full inclusion, he draws a distinction between inclusive education as a rights-based physical inclusion of learners in mainstream schools and inclusive education as a form of pedagogical practice within schools.

schools, or regular classes in mainstream schools, following the model of ‘the least restrictive environment’.” (p.209)

The EWP6 approach to inclusive education on the system level is a progressive approach that envisions an increase of full-service schools over time (Murungi, 2015), and thereby enacting a ‘stricter sense’ of inclusion where the majority of learners are able to participate and achieve in a mainstream setting (Department of Education, 2001).

The DBSTs and SBSTs are to serve the role of educational support in order to recognise and address barriers to learning and thereby enable schools to accommodate the wide range of learning needs (Department of Education, 2001). As part of this process, there are identification procedures to determine the level of support required by learners and whether the learning needs of some learners would be better met in a different school environment - a target set especially for early identification in pre-schools (Department of Education, 2001).

Although this seems a paradoxical move in terms of inclusive education, the movement of learners to specialised settings following screening procedures for learning difficulties, the premise for the placement of learners in specialised schools is based on the idea that the education system in broad would adopt an inclusive education pedagogy (Department of Education, 2001). The intention remains, even for the mainstream school sector, that an inclusive pedagogical framework be adopted (Department of Education, 2001). The attempt is therefore to prevent unnecessary displacement, which would equate to exclusion, by means of creating diverse school environments that could assist learning needs in their diversity and intensity. In support of this end, the inclusive pedagogical framework across all modes of teaching has as its basis an approach to teaching that (Department of Education, 2001):

- Strives to overcome barriers to learning, especially those that are caused by education and training systems
- is learner-centred, with attention paid to individual learning needs
- promotes cooperative learning
- has flexible lessons to enable the above

Inclusive education endorses an approach to teaching that is sensitive to diverse learning needs and that endorses diverse teaching practices - adjustments to teaching practices that aims at promoting learning by overcoming barriers, and not, for example, repeated status quo practices such as rote learning and ‘drilling in’ performed for the sake of itself (Engelbrecht et al., 2005). It is therefore a practice that is itself a “progressive raising of quality in education” (Department of Education, 2001, pp. 11-12) and proposes a specific epistemological stance, or approach to

knowledge in terms of its dissemination and construction. As a pedagogical framework, then, inclusive education promotes both an ethical responsibility of inclusion of learners regardless of individual differences and purports an epistemology that views learning in the school context as a co-creational event guided by individual learning needs – i.e. a teaching and learning environment where learner needs for learning are taken into consideration. These premises of the pedagogical framework, specific positions on the ethical and epistemological responsibilities of education, are convictions forming the basis of any theoretical or practical approach to education and can be traced to the type of ideological roots Brantlinger refers to in her position on the centrality of ideology with regard to fields of education (Allan, 2013; Collins & Broderick, 2013).

### **2.3 Inclusive education as ideology**

In this section, inclusive education is viewed from the lens of ideology and ideological roots. The identified impediments to the endorsement of inclusive education addressed in the previous section are explored in the context of epistemological and ethical justifications for pedagogical frameworks. Epistemological and ethical claims in the context of pedagogical practice are framed as ideological roots and critically reviewed in the context of the work of Ellen Brantlinger and Paulo Freire.

#### **2.3.1 Ideology and inclusive education**

Barrow (2010) indicates that within the wide variety of philosophical frameworks on education there are two primary aspects that repeat: purported ethics and epistemology. Education being the means and process by which skills and knowledge are conferred to members of a society, it is understandable that these two aspects are prevalent with regard to our understanding of education. Whether education is viewed as a societal responsibility or as an individual right, or a combination of both, the view itself is an ethics-related position. Education being a practice involving knowledge means it is inextricably linked to epistemology. The centrality of these two aspects within education is so prevalent that within several philosophies of education, if not all, the two cannot be divorced and are treated as interdependent concepts. Within Rousseau's 'natural' education the learner should be granted freedom so as to naturally develop the required knowledge and skills to become a fully functioning individual and member of society (Noddings, 2007). In this context, the ethically responsible form of education is when the learner is granted freedom to explore interests and be confronted with morally-laden situations, so as to develop the necessary knowledge and framework of ethics in order to navigate and succeed in their world. In Deweyan philosophy of education, choice in learning plays a significant role (Noddings, 2007). In order to foster a democratic society, the individual should be represented in their education

(Brantlinger, 1997; Noddings, 2007). Education is also seen as a process of growth and not the achievement of specified outcomes alone, thereby signifying that the individual's unique contribution to society is also dependent on the development of their particular set of skills and strengths (Noddings, 2007). As indicated through these two examples, what is to be taught and how it is to be taught is intertwined with responsibilities towards the learner and society at large.

In discussing the structure of philosophies of education, Barrow (2010) indicates that the distinction between philosophy and ideology is vague and, depending on source or context, the terms are used interchangeably. In addressing social exclusion, Byrne argues that ideology is more than discourse as “it affects very real material interests and inform political actions” (Byrne, 2005, p. 12); which applies to inclusive education as a broader pedagogical framework holding specific epistemological demands and founded on specific ethical justifications, yet having social and financial implications. Brantlinger views ideology as a set of convictions, often held on an unconscious level, that permeates the way we look at and approach the world (Allan, 2013). Her critique in *Using Ideology* (Brantlinger, 1997), however, explores specific contesting positions on inclusive education that are ideologically informed. The late Ellen Brantlinger's work regularly revisits the role of 'systems of power', which are ideologically informed, and its influence on pedagogical practice in general, but especially its influence in the co-option or disregard of inclusive education (Brantlinger, 2003, 2004, 2006). Her work is recognised for its role in highlighting adverse systemic influences on inclusive education practice and its intended implementation (Ainscow & César, 2006; Allan, 2013; Collins & Broderick, 2013; Danforth & Naraian, 2015; Slee & Allan, 2001). However, it is her work in *Using Ideology* that is considered the seminal piece that drew attention to the influence of ideological factors in the acceptance, support and implementation of inclusive education (Allan, 2013). Similar to acknowledged philosophies of education, the divergence on the interpretations of inclusive education that she addresses is along the lines of what is considered epistemologically sound and ethically warranted forms of education (Brantlinger, 1997). It is therefore sensible that there are contexts where the terms philosophy and ideology could be used interchangeably when discussing pedagogical frameworks, as Barrow suggests (2010).

The problem that Brantlinger identifies regarding understandings of and research into inclusive education is that contention is usually a product of one position declaring ideological neutrality (1997). For Žižek (1999), ideology is embedded in our very view of reality – that what we hold or build as our reality is built upon ideological convictions. Brantlinger cites Tyack and Tobin's (1997, p. 439) view of the concept of the 'real school', which alters reforms to education to support pre-existing systems, to present her case that ideology is an inescapable influence on our understanding of which pedagogical frameworks best achieve what education should achieve. In

citing Eagleton's "Like the poor, ideology is always with us" (Allan, 2013), Allan presents ideological influence as doggedly influencing our views on things such as education. The contention as to what pedagogical framework best leads to the goals education should achieve is therefore itself a product of an already ideologically established position of what education is and what its ends should be. As it is impossible to declare pedagogical frameworks as ideologically neutral, even if only due to our own ideologically-laden expectations of education, it serves us best to determine the merit of a pedagogical framework on the grounds of its ideological foundations, or what Brantlinger calls its 'ideological roots' (Allan, 2013; Collins & Broderick, 2013).

In her article *On Ideology*, Brantlinger draws a comparison between inclusive education and what she identifies as 'traditionalist' education (1997, p. 430). It is argued that inclusive education is criticised and opposed by traditionalists because it contends with an already established education system that endorses a linear development structure in terms of academic content and skills (Brantlinger, 1997). This linear structure is embedded in principles of competition and a standardised curriculum deemed applicable to most students, with especially the disabled considered to gain more in terms of their education in a specialised education setting (Brantlinger, 1997). Brantlinger argues (1997) that inclusive education proposes not only that learners of diverse capabilities can learn together; but that a diverse setting can enhance their learning through interaction and imitation, has positive social influences in terms of cohesion and collaboration, and that "knowledge and competence are purposefully constructed in a variety ways from a range of meaningful phenomena in enriched and stimulating contexts" (p.435). This point of divergence is what is identified as the ideological roots of the pedagogical positions (2013; Collins & Broderick, 2013).

These ideological roots are, in part, the epistemological and ethical foundations of the two pedagogies<sup>10</sup>. In terms of epistemology, the traditionalist stance is that knowledge is bound in curriculum and systematically taught and learned in line with the stage of development and capability. Knowledge is therefore a set framework of information and skills of which the complexity is equivalent to a normative measure of the envisioned average student. Consequently, capability becomes the measure of what teachable and learnable knowledge is and learning is the linear transference of the set body of knowledge and skills. The ethical roots of the traditionalist stance are enmeshed with this epistemology, determining that the 'right' form of teaching and learning is and will occur in a setting where capability matches the level of knowledge determined appropriate for capability. For Brantlinger (1997), these ideological roots

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<sup>10</sup> Slee (2014), Allan (2013) and Brantlinger (1997) also identifies socio-political stances, such as neo-liberalism, that are determinable foundations for traditionalist and contemporary pedagogy.



are supported through a circular defence of educational institutions already serving the educational needs of learners because they adhere to these ideological foundations.

Opposed to this, several proponents of inclusive education indicate that it endorses an epistemology that views knowledge and capability as constructed through meaningful educational events. In line with social constructivist views on learning (Nel et al., 2016), it acknowledges and promotes learning as a co-creational process. Effective learning is therefore subject to an education process that takes into account learning needs, so as to enable meaningful educational events that contribute to knowledge construction and development of abilities on the individual level, and acknowledges the role social interaction and context play in the education process. The endorsed ethics of inclusive education is based on the principles of human rights to quality education and calls for an education system and practice that is representative of the society learners find themselves in and conducive to the development of the ability to navigate, cooperate in and contribute to their society. These ideological roots not only serve to give an understanding of the educational ends of these differing pedagogies but also assist in determining the ideological grounds used to contest pedagogical approaches such as inclusive education (*cf.* 1.1.1).

In the South African context, there are two repeating occurrences of interest discernible from studies focussing on the success of the implementation of inclusive education, or the willingness of teachers to endorse or apply it in schools, that can be related back to ideological influencers (*cf.* 1.1.1). The first is varying definitions and accompanying practices of inclusive education that repeat or introduce new patterns of exclusion whilst claiming to implement inclusive education (Murungi, 2015). The second refers to the dismissal of inclusive education on the grounds of it counteracting the ends of education practice (Meltz et al., 2014), akin to traditionalist counterarguments to full inclusion, in particular arguments that criticise inclusive education as disruptive to actual in-class teaching practice and the process of disseminating knowledge. The former recognises learners who experience barriers to learning as part of the school community and deserving of human dignity and an education but echoes the traditionalist view that learning interests are best served in the institutional framework that aligns capability with specialised settings. For example, learners experiencing barriers to learning might be included in class or school, but are in designated 'special classes' or 'special learning programmes' (Nel et al., 2014; Ngcobo & Muthukrishna, 2011). The second denies inclusive education's epistemological possibilities on the premise that it counteracts the epistemological ends of education. The position here is reminiscent of the traditionalist stance that inclusive education is an 'idealistic' notion negligent of 'standard' education practice (Brantlinger, 1997, p. 436). For example, it might be argued that inclusive education is representative of the ethics of our society (Donohue & Bornman, 2014; Engelbrecht et al., 2013; Meltz et al., 2014), but places demands that cannot be

met in the classroom or disrupts normal teaching practice (De Jager, 2011; Oswald & Engelbrecht, 2011).

Brantlinger's comparison of traditionalist and inclusive education is a product of studies done within the context of research and practice of inclusive education but focuses primarily on the influences of these ideological roots in securing existing power relations (1997). Although the ethics of endorsed pedagogies are explicitly explored and questioned, it primarily addresses knowledge, and therefore epistemology, as an instrument in the service of power (Brantlinger, 1997). The form of comparison applied is akin to Paulo Freire's comparison of critical- and bank education in his seminal work, *Pedagogy of the Oppressed* (1993). Whilst Brantlinger focuses on inclusive education, Freire addresses pedagogy in the broad. However, in *Pedagogy of the Oppressed*, Freire explores the specific link between epistemology and ethics in pedagogy and the greater influence pedagogical practice has in developing a view of the world and society for the learner (1993).

### **2.3.2 Comparing pedagogies: Applying Freire**

In *Pedagogy of the Oppressed* (1993), Paulo Freire draws a comparison between what he calls problem-posing or critical education and banking education. He describes banking education as a pedagogy that relies on the transference of knowledge, or a 'narrative' of what is to be known (Freire, 1993). It presents a standardised body of knowledge that is one-directionally 'banked' by the teacher into the mind of the 'meek' and 'pliable' learner (Freire, 1993, pp. 53-54). He considers banking a 'lifeless' pedagogy (Freire, 1993, p. 52), one not involved with the world of the learner but one imposing a world on them. Banking education, as with Brantlinger's traditionalist education (1997), serves only the interests of a few and primarily those who are already empowered by the status quo (Freire, 1993). The approach towards the 'marginals', in Freire's writing the oppressed (1993, p. 55) and in inclusive education the disabled and those experiencing other barriers to learning, are that they are of society but not in society. Consequently, the education system takes on a form that best assists learners to 'fit' into an established world.

Critical pedagogy, on the other hand, sees the marginalised as part of society and education's responsibility as one of empowerment of all for the transformation of their world (Freire, 1993). Knowledge in this framework is a co-creational event, between learners and between learners and the teacher, so as to empower learners to critically reflect upon their world and develop conscious intentionality for grappling with reality (Freire, 1993). Freire ascribes this approach to learning to 'authentic thinking' (1993, p. 54), learners engaged in the learning process as critical thinking individuals and not only the recipients of reports of a static reality. Growth through learning is not the measurable reproduction of banked content, but the "emergence of

consciousness and critical intervention in reality” (Freire, 1993, p. 62). This is also the emergent ethics of critical pedagogy, pedagogy as a liberating and humanising process for all learners (Freire, 1993).

In terms of ideological roots, banking education promotes an epistemology that sees knowledge as a static occurrence and representative of a static world; a view of pedagogy as the vertical process of imprinting this body of knowledge in the minds of pliable learners and measuring success in the accurate reproduction thereof; and a view of learning as the ability of the learner to function as a receptacle for transferred knowledge and being able to effectively participate in the reproduction process thereof. The ethics of this pedagogical framework is intertwined with this epistemology. Banking education is responsible for shaping the consciousness of the learner to fit the established world. The same trend is found in traditionalist education and the counterarguments against inclusive education found in South African studies on the implementation of inclusive education (*cf.* 2.3.1). The traditionalists posit that the education system already achieves its intended epistemological purpose by having an academically and subject-matter standardised structure where a “statistical norm is the proper achievement for all pupils of a certain chronological age”, and diversity is accommodated in separate milieus or expected to conform to standard practice (Brantlinger, 1997, p. 434). Diversity in learning is not addressed as a general reality in all classrooms and success in learning is determined by outputs reached as traditionally determined by subject-matter practices (Brantlinger, 1997). The ethical responsibility of this form of pedagogy is then to train to achieve according to level outputs or allocate learners in an educative environment best suited to the outputs they can reach.

Critical pedagogy and inclusive education share the same ideological roots in terms of epistemology and ethics. Both view knowledge as a constructed product from the position of the learner (Freire, 1993; UNESCO, 1994). The practice of pedagogy is to enable the learner to develop the aptitude and skills to grapple with their world, not to fulfil systemic ends but to be a system of empowerment. On the individual level, it means to be assisted to develop prowess of critical reflection for construction of knowledge, which is an impossibility if the learner is not recognised in the learning process (Freire, 1993) - for inclusive education this recognition of the learner includes diversity in learning needs. As a co-creational event, knowledge is a product of interaction amongst learners and the teacher when grappling with course content. If knowledge is to be reflective of the world of the learner, it cannot then be explored or accurately constructed if the social milieu within which the process occurs is not representative of the society the learners find themselves in – an argument explicitly held by Freire (1993) and proponents of inclusive education (Brantlinger, 1997; Kiuppis & Hausstätter, 2014; Swart & Pettipher, 2016). This would mean that diversity should be a central feature in the classroom and pedagogical practice

employed with diversity in mind. For Freire, it is a source of creativity and requirement of the humanisation process (1993), and inclusion therefore a requirement for reflective dialogue and the liberation of learners. In inclusive education, diversity on multiple levels is an unquestioned reality and, therefore, a factor that education should recognise as part of its responsibility towards human rights to education and human dignity (*cf.* 2.2.1). For both critical pedagogy and inclusive education, recognition and inclusion of the learner is therefore an ethical foundation and requirement of pedagogical frameworks.

## **2.4 Ideological roots and inclusive education in South Africa**

A preliminary study of literature on inclusive education practice in South Africa showed that educators contest the practice of inclusive education along the lines of what could be considered ideological grounds (*cf.* 1.1.1; 1.1.2; 2.3.1). Contrary to the EWP6 position of inclusive education being a general pedagogical approach to education (Department of Education, 2001), views held by educators with regard to the application and role of inclusive education is narrowed to a distinct epistemological approach, different from standard education practice (De Jager, 2011; Makoelle, 2014), and best applied in specialised setting where it does not disrupt regular schooling or where the relevant form of education can occur (Donohue & Bornman, 2014; Meltz et al., 2014). Opposing forms of pedagogy are therefore identified, similar to the traditionalist and inclusive education divide and the banking education and critical education divide. As a division along the lines of an ideological root of an epistemology of practiced pedagogy, teaching and learning is a standardised practice interrupted by diversity. Along the lines of ethics, inclusion in education is a recognised responsibility but it becomes a question of placement. By taking this position, inclusive education is relegated to a role of physical inclusion only.

An in-depth study to procure data on different parties responsible for the implementation of inclusive education within the South African education system can determine what ideological roots can be discerned from their views on inclusive education policy and practice and whether they are in line with those discernible from the developed pedagogical framework of inclusive education (*cf.* 2.2; 2.3.1). The two domains whose views on inclusive education would be relevant for such a study are the domains of school practice and preparation for school practice. In other words, the realm of application of inclusive education and the realm of training in inclusive education practice. To this end a mixed methods study is employed, with a qualitative phase collecting views on inclusive education held by practicing teachers, and the relevant and repeating ideological roots identified as part of these views, and a quantitative phase in turn constructed on these findings to ascertain if similar ideological roots are held in the teacher training sector.

A systematic literature review is a suitable approach for the qualitative phase, as there are already extensive studies done on the attitudes and perceptions of in-service teachers with regard to inclusive education from which the 'ideological roots' at play can be discerned (Donohue & Bornman, 2014; Engelbrecht et al., 2013; Meltz et al., 2014; Nel et al., 2014; Ngcobo & Muthukrishna, 2011). In the quantitative phase, a questionnaire will be constructed based on the findings of the systematic literature review, with questions aimed at eliciting responses that will reflect whether similar views are held by pre-service teachers and lecturers as those held by in-service teachers. Findings in both these phases will serve as the context by which the ideological implications for both the support and opposition to inclusive education will be discussed and its implications explored in a comparative analysis reminiscent of and with reference to the one performed by Freire in the case of banking- and critical pedagogy (1993).

## **2.5 Conclusion**

In this chapter the international and South African developments of inclusive education were explored. It was argued that pedagogical frameworks, such as inclusive education, are founded on and criticised on the grounds of epistemological and ethical claims – identified here as ideological roots of pedagogical frameworks. The concept of ideological roots, and its role in the varied understandings of and impediments to inclusive education, was explained in the context of the work of Brantlinger. These concepts were then compared to the concepts of banking education and critical education, as introduced by Freire, and the argument formulated that those misunderstandings of the role and purpose of inclusive education, and the contestation to inclusive education as a consequence, can be understood as the result of these competing ideas around the epistemological and ethical roles of pedagogy. Based on this argument, a mixed methods study was suggested to accrue data on the views held by South African in-service teachers, lecturers, and pre-service teachers on inclusive education, in order to ascertain how these views are informed by ideological roots and compare with the developed pedagogical framework of inclusive education. The following chapter details the suggested mixed methods study.

## **CHAPTER 3 - OVERVIEW OF THE EMPIRICAL STUDY**

### **3.1 Overview of chapter**

This chapter outlines the research design of the study. The reason for the methodologies applied will be clarified according to the method's applicability in terms of qualitative and quantitative data gathering as part of a broader mixed methods research design. The steps for the qualitative phase and the quantitative phase of the study are clearly explained to show the sequential exploratory approach. The ethical considerations of the study are also given due attention according to each phase of the study.

### **3.2 Research design**

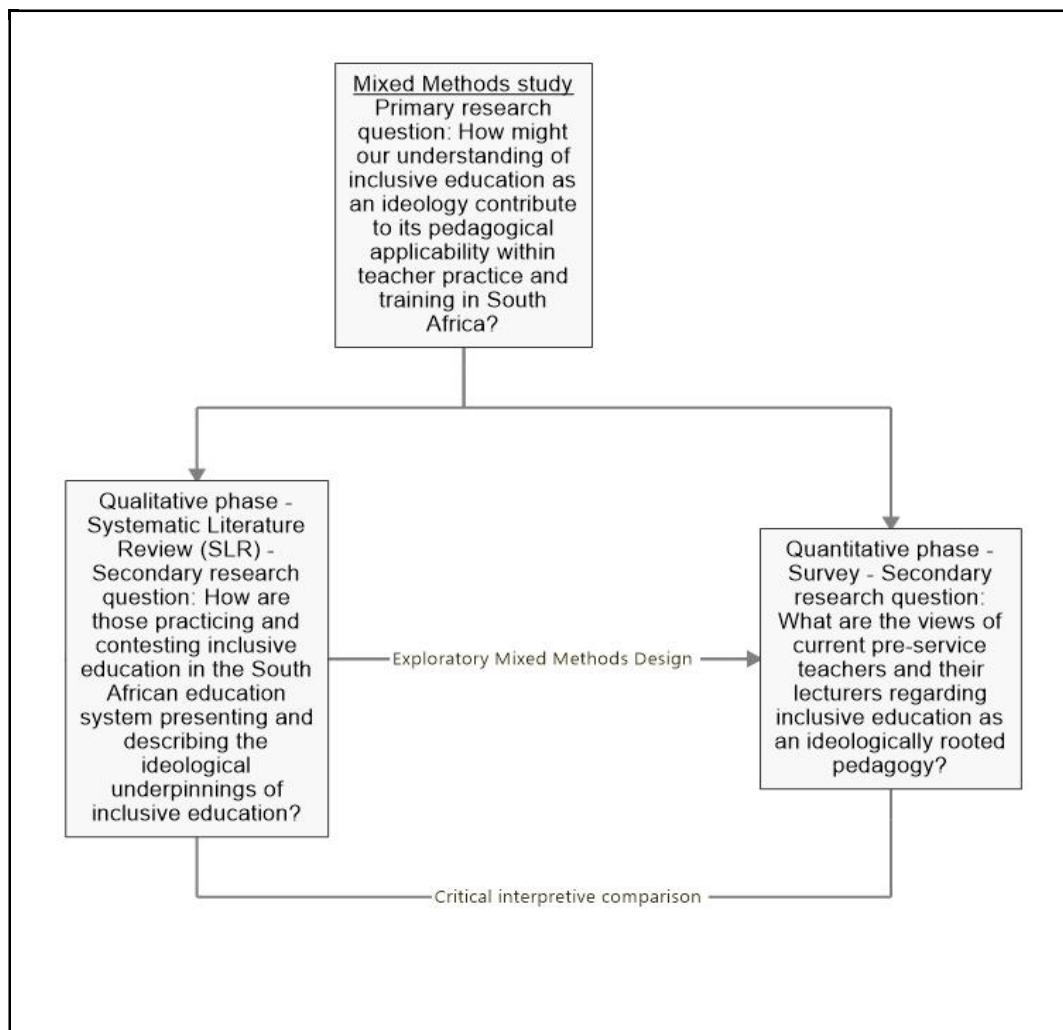
The research design of a study encapsulates both the details pertaining to the planning and execution of a research project, as well as the methods employed by the researcher to ensure responsible research practice and to guard against flawed interpretations of data (Punch, 2014). In this section, a detailed account of the broader mixed methods research design and the underlying qualitative and quantitative phases are given.

#### **3.2.1 Sequential exploratory mixed methods design**

In the previous chapters, it was argued that preliminary research indicates that in-service teachers contest the practice of inclusive education based on reductionist views of inclusive education (*cf.* 1.2; 2.4). Within the context described, this reductionist view can be attributed to specific misunderstandings of what inclusive education, or contrary ideological views to inclusive education, entails in terms of its purported ethics and epistemology. There is an extensive body of research done on the perception or attitudes of in-service teachers with regard to inclusive education as pedagogy (*cf.* 1.2; 1.3; 2.3.1), which can serve as a basis to review whether contestation or critique is based on the ideological roots of ethics and epistemology identified in the previous chapter (*cf.* 2.3). A systematic literature review (SLR) was ideal for such a review. An SLR can be described as a broader literature study exploring existing studies on a specific topic and systematically reviewing this material for the critical analysis and synthesis of evidence related to the posed research question (Milner, 2015). In this instance, the question is on the views held by in-service teachers, be they described as views, attitudes, perceptions, or ideological position or similar indicators. A qualitative SLR was therefore required, for this form of SLR aims to represent a more comprehensive understanding of the participant experience of the phenomena of interest, rather than the meta-statistical representation of reported quantitative data (Butler et al., 2016; Milner, 2015).

The qualitative phase yielded information on in-service teachers and their views of inclusive education as pedagogy. This study expanded on these findings by developing a quantitative phase to further explore the views on inclusive education held by pre-service teachers and their lecturers. The views of in-service teachers with regard to the epistemological and ethical implications of inclusive education and competing traditionalist views of pedagogy were used as a basis to construct a questionnaire to test if pre-service teachers and their lecturers ascribe similar ideological roots in their views on inclusive education. The overall research design is therefore a mixed methods research design. Van Wyk and Taole (2015), describe mixed methods research designs as research designs that make use of both qualitative and quantitative methods for depth of understanding concerning the phenomenon under investigation – in this case, the ideological roots ascribed to inclusive education and oppositional pedagogies. A sequential mixed methods research design is a mixed methods design where results of one phase of research are used for the design of the other (Teddlie & Yu, 2007). A sequential exploratory mixed methods design is used when qualitative data is accrued before attempting further quantitative testing or measurement (Van Wyk & Taole, 2015). The quantitative results are then used to further build upon the initial qualitative results (Punch, 2014). In terms of sampling, mixed methods research stands as third alternative to purposive and probability sampling positions (Teddlie & Yu, 2007), generally attributed to qualitative and quantitative sampling respectively. This study employed mixed methods sampling so as to “generate complementary databases that include information that has both depth and breadth regarding the phenomenon under study” (Teddlie & Yu, 2007, p. 83).

In this study the sequential order is the qualitative phase followed by the quantitative phase – the qualitative phase employed for exploratory accrument of data that was then employed for the design of the quantitative phase research instrument. The study is a fully mixed sequential design, for the phases are mixed and information drawn from the one phase was used to design the sequential phase (Leech & Onwuegbuzie, 2009). The qualitative phase is therefore also the dominant phase in the study, as the quantitative phase’s sequential structure was dependent on data obtained from the qualitative phase (Leech & Onwuegbuzie, 2009). This dominance applies only in terms of the structure of the overall research design. The data yielded from the two phases will carry equal weight in the final inference phase of the study for representing the diverse sample groups relevant to the research question, in-service teachers in the qualitative phase and pre-service teachers and lecturers in the quantitative phase. The overarching research design can be presented as follows:



**Figure 3-1: Mixed methods study structure**

Through the adoption of two research approaches, and three sample data sets, the trustworthiness of the data collected was ensured through triangulation – the reinforcement of research findings by means of different data sets (De Vos, 2005).

### 3.2.2 Qualitative phase

Butler, Hall and Copnell (2016) divide the qualitative SLR in two stages, following the formation of a clear research question: the development of a search strategy stage and the review of a literature stage. It is recommended that the formulation of a research question and search strategy guidelines for a SLR are done by means of a research framework (Butler et al., 2016; Milner, 2015).

The primary question of this study is: How might our understanding of inclusive education as an ideology contribute to its pedagogical applicability within teacher practice and training in South



Africa? In order to address this question through critical analysis, existing views on inclusive education and competing pedagogies have to be discerned. To this end, and as discussed in the previous section (*cf.* 3.2.1), views of the parties involved with inclusive education as practiced pedagogy have to be determined. In terms of the qualitative phase and the suggested SLR, the views of in-service teachers are of importance. The research question that aptly guides this phase of the study is secondary question three (3) (*cf.* 1.4.2): How are those practicing and contesting inclusive education in the South African education system presenting and describing the ideological underpinnings of inclusive education?

Although there are several search tools available to researchers for the use in SLRs (Butler et al., 2016), the recommended search tool for qualitative SLRs is the SPIDER tool – Sample, Phenomenon, Design, Evaluation and Research Type (Cooke et al., 2012). Although SLR research frameworks, such as the SPIDER tool, are advisably applied to construct valid research questions (Butler et al., 2016; Milner, 2015; Tong et al., 2012), the tool can be applied to test the structural applicability of the existing research question and in turn guide the research strategy. The SPIDER tool is an acronym for developing research questions and guiding search strategies according to the following required categories – Sample, Phenomenon of Interest, Design, Evaluation, and Research type (Tong et al., 2012).

These categories can be defined as follows:

**Table 3-1: SPIDER tool categories. Adapted from Cooke et al. (2012)**

SPIDER	Description
S – Sample	Participants of the study
PI – Phenomenon of Interest	Qualitative research aims to understand the how and why of certain behaviours. The phenomenon is the key feature to which the views, attitudes or behaviours of participants are connected and investigated.
D – Design	Research designs that would yield required information in an SLR.
E – Evaluation	Qualitative research has the same end result as quantitative research methods: outcome measures. These differ, depending on the

	research question and might contain more unobservable and subjective constructs when compared to quantitative research (e.g. attitudes and views and so forth) – evaluation, therefore, the appropriate measure of sample interaction with the phenomenon.
R – Research type	Three research types could be searched for: qualitative, quantitative, and mixed methods.

To depict the structural appropriateness of the research question for yielding the required results for the qualitative phase, it can be redrawn according to SPIDER categories:

**Table 3-2: Structural validation of secondary research according to SPIDER. Guidelines used from Butler et al. (2016). Content adapted from Cooke et al. (2012)**

Tool (SPIDER)	Phase question:  How are those practicing and contesting inclusive education in the South African education system presenting and describing the ideological underpinnings of inclusive education?	Main research question (relevance to further critical analysis)
S - Sample	[those practicing and contesting inclusive education]  In-service teachers in South Africa.	One of the three identified parties involved with inclusive education pedagogy.
PI – Phenomenon of Interest	[perception of inclusive education in the South African education system]  Inclusive Education, Inclusive pedagogy, Ideology, Inclusive education as perceived by South African educators.	Understanding of Inclusive Education according to ideological roots.

D – Design	[presenting and describing]  Any design eliciting views of teachers on inclusive education will be relevant: questionnaires, surveys, interviews, focus groups, case studies or observations.	Existing studies on pre-service teacher views/positions on IE.
E – Evaluation	[presenting and describing the ideological underpinnings of inclusive education]  Views, experiences, opinions, attitudes, perceptions, beliefs, understanding, or knowledge of.	How the in-service teachers are indicating their understanding of IE in terms of ideological roots.
R – Research type	Qualitative, quantitative or mixed methods.  Any studies that indicate evaluations with regard to the phenomenon of interest.	Any research type that procures data on views/positions on IE – excluding grey studies (conferences, comments, theses, etc.). Refined based on search results.

### 3.2.2.1 Research protocol

In order to ensure relevant and high-quality SLR studies, ensured of limited researcher bias, a detailed and comprehensive protocol needs to be developed for the execution of the review along with efficacious and transparent reporting of the review process (Butler et al., 2016; Okoli & Schabram, 2010; Tong et al., 2012). The research protocol guides the SLR and ensures that methodological decisions, inclusion and exclusion criteria, and synthesis of research data are justifiable and performed with professional scrutiny (Butler et al., 2016; Okoli & Schabram, 2010). From the work of Butler et al. (2016) the following six steps for designing a research protocol for SLRs can be identified:

**Table 3-3: Research protocol steps**

Steps of protocol	Justification/description
Step 1: Decide on topic and aim	Clear research problem with aims guiding the search strategy ( <i>cf.</i> 3.2.2, Table 3.2)
Step 2: Develop search strategy	Employ search tool, SPIDER, for determining: keywords and search terms, inclusion and exclusion criteria, and search strategy (i.e. relevant databases and research material)
Step 3: Execute search and collect research material	Apply search strategy
Step 4: Critical Appraisal	Appraisal of potential studies to be included for data extraction and synthesis. Clear guidelines for appraisal to be developed
Step 5: Data Extraction	Data defined by protocol and search strategy – first order and/or second order constructs (Butler et al., 2016)
Step 6: Data Synthesis	Synthesis or analysis of collected findings associated with the phenomenon of interest

#### 3.2.2.1.1 Step one: Decide on topic and aim

In Chapter 1 the rationale is given for the proposed study (*cf.* 1.1.2), based on the fact that studies pertaining to inclusive education indicate that the phenomenon of interest is at play but that there are no studies exploring the phenomenon of interest as it occurs in different sample groups in the context of the South African education sector. As a mixed methods design focussing on different sample groups with relation to the central phenomenon of interest, the topics of interest are best refined per phase and research design. For the qualitative phase, this meant that secondary question three (3), “How are those practicing and contesting inclusive education in the South

African education system presenting and describing the ideological underpinnings of inclusive education?”, would be the appropriate research question for guiding the SLR (*cf.* 3.2.2). The aim of the qualitative phase was to gather data on the perceptions of in-service teachers in South Africa with regard to inclusive education, specifically in terms of the ideological underpinnings of ethics and epistemology that they ascribe to education practice.

#### 3.2.2.1.2 Step two: Develop search strategy

The SLR search strategy was guided by the SPIDER research tool (see Table 3-2). SPIDER subdivides the research question into parts that guide researchers to identify and present the relevant terms when searching databases for research related to the SLR (Butler et al., 2016; Cooke et al., 2012). The terms to be used are determined by five categories: Sample, Phenomenon of Interest, Design, Evaluation, and Research type (Cooke et al., 2012). The sample group for the qualitative phase and SLR are in-service teachers in South Africa. The key terms for the search proposed here were: “teacher\*”, or “educator\*”, and “South Africa\*”. The phenomenon of interest is the perception and understanding of education practices, specifically inclusive education, as an ideologically rooted practice. The key terms proposed here were: “inclusive education”, or “special needs education”, or “inclusive pedagogy”. ‘Special needs education’ was kept as a search term due to continued use of the term internationally and locally (*cf.* 2.2.1).

The study designs and research types that were to be part of this SLR were initially kept broad, covering a variety of research designs from both the quantitative and qualitative spectrum, including mixed methods designs. Should this have led to a high number of irrelevant hits, the design terms would have been refined to only reflect qualitative and mixed methods designs incorporating research methods such as interviews or focus groups. Qualitative studies, such as interviews, are developed for detailed exploration of a phenomenon (Creswell, 2012) and yielded more relevant data in terms of in-service teacher reports on perceptions of inclusive education.

In terms of the ‘Evaluation’ category of the SPIDER tool, this phase of the study was concerned with presenting and describing the ideological underpinnings of inclusive education by in-service teachers. In order to attain data on how these ideological underpinnings are described and presented, the proposed search terms were aimed at studies relating to in-service teacher perceptions or evaluations of inclusive education and the practice thereof. Relevant terms applied in this study were: “perceptions”, “attitudes”, “beliefs”, “views” and “experience\*”. As part of the exclusion criteria, other relevant factors to be included in the search parameters were the date of publication and the type of publication. As indicated in Chapter 1 (*cf.* 1.7.2.2.1), only peer-

reviewed articles from accredited journals were to be considered for this study. Also, the date of publication was limited to articles published after 2001, the year of the publication EWP6.

The search terms can be presented as follows:

**Table 3-4: Search terms**

Tool (SPIDER)	Search terms
S - Sample	<p>[those practicing and contesting inclusive education]</p> <p>In-service teachers in South Africa.</p> <p>“teacher*” OR “in-service educator*” OR “educator*” AND “South Africa”</p>
PI – Phenomenon of Interest	<p>[perception of inclusive education in the South African education system]</p> <p>Inclusive Education, Inclusive pedagogy, as perceived by South African educators.</p> <p>“inclusive education” OR “special needs education” OR “inclusive pedagogy”</p>
D – Design	<p>[presenting and describing]</p> <p>Any design eliciting views of teachers on inclusive education will be relevant: questionnaires, surveys, interviews, focus groups, case studies or observations.</p>
E – Evaluation	<p>[presenting and describing the ideological underpinnings of inclusive education]</p> <p>Views, experiences, opinions, attitudes, perceptions, beliefs, understanding, or knowledge of</p> <p>“perceptions” OR “attitudes” OR “beliefs” OR “views” OR “experience*”</p>
R – Research type	<p>Qualitative, quantitative or mixed methods. Any studies that indicate evaluations with regard to the phenomenon of interest.</p>

	Only journal articles. Only published post-2001.
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The search was conducted as a manual search using the following search engines to acquire relevant articles for review: EBSCOHost, Sabinet African Journals (formerly SAePublications), and Google Scholar.

### 3.2.2.1.3 Step three: Execute search and collect research material

The search for relevant material was conducted by the researcher and two independent researchers. Key to a scientifically viable and objective SLR is a recorded and reviewed search procedure (Butler et al., 2016; Okoli & Schabram, 2010). As part of an “audit trail” for the enhancement of trustworthiness (Butler et al., 2016), detailed records were kept of the dates and times the searches were done, including the full report of articles yielded from the search by all researchers. The independent researchers were included to test the search parameters and to ensure that all the articles included in the SLR were as a result of the search strategy, that no articles as a result of the search were missed or unwarrantedly excluded. In addition, the PRISMA (Preferred Reporting Items for Systematic reviews and Meta-analyses) flowchart, recommended tool for reporting SLR search procedures (Butler et al., 2016; Moher et al., 2009), was used as a visual representation of all search results and further search refinement procedures. Any amendments to the search strategy were discussed with the independent researchers and formed part of the final executed search by all the researchers. Amendments to the search strategy would only have been considered if the number of articles gained was not sufficient in number to yield sufficient data on the ideological roots attributed to inclusive education or general interpretations of education. Or, if the search strategy resulted in a high number of articles that were missed hits with regard to the topic of research.

All the search terms indicated in Table 3-4 were used in the database search and were be truncated where necessary. Boolean operators were used to combine all search terms per database search. It is suggested by Cooke et al. (2012), for a fruitful SLR search, that the search terms should be combined by the ‘AND’ operator across the S and Pi categories of the SPIDER tool division, and then combined by ‘AND’ with an ‘OR’ operator division between the methodological D, E and R categories. With no limitations placed on the research design or methodologies, the E and R categories did not have to be qualified for this search approach, unless the search strategy was to be amended. As indicated in the S category, the phrase “South Africa” qualifies the sample (S category) and scope of the phenomena of interest (Pi category). The phrase “South Africa” was therefore included as a refinement search term after the S and P

categories. The search string was therefore S 'AND' Pi AND "South Africa" 'AND' E. The final search string to be read into the databases read: (teacher\* OR educator\*) AND ("inclusive education" OR "special needs education" OR "inclusive pedagogy") AND "South Africa" AND (attitude\* OR perspective\* OR belief\* OR attitude\*). To ensure articles addressing the phenomena of interest were targeted, but also that no unnecessary articles related to phenomena of interest are excluded, only the P category string ("inclusive education" OR "special needs education" OR "inclusive pedagogy") was required to appear in the title.

The exclusion criteria did not have to be included as a 'NOT' Boolean phrase, as the databases have a date of publication and searches among accredited journals as functions to be selected when executing a search.

#### 3.2.2.1.4 Step four: Critical appraisal

The critical appraisal phase, or quality appraisal phase (Okoli & Schabram, 2010), is the stage of the SLR search that ensures the relevance of the screened articles and the methodological soundness of these articles (Bettany-Saltikov, 2010; Butler et al., 2016). To measure relevance for inclusion, a clear critical appraisal protocol is suggested, with a scoring or ranking system that indicates the quality of studies considered for the SLR (Butler et al., 2016). For the purpose of this study, which required reporting on teachers' views on inclusive education, a broad set of methodologies were appropriate for inclusion. A critical appraisal tool with checklist features for immediate exclusion was used. Apart from the checklist, a ranking system for recording the quality of articles was applied. The ranking occurred according to three categories – high-quality paper, medium-quality paper and low-quality paper. Papers ranking as low-quality required additional review for justification of inclusion or exclusion of the study.

The critical appraisal tool (See Annexure A) for this study was adapted from the Critical Appraisal Skills Programme CASP checklist (CASP, 2018). Nine of the ten appraisal questions were retained and adapted. The second question, "Is the qualitative methodology appropriate?" (CASP, 2018), was omitted due to this SLR search not having excluded methodologies. Also, question 3, "Was the research design appropriate to address the aims of the research?" (CASP, 2018), was considered a robust evaluative question with regard to the appropriateness of chosen methodologies. The two checklist components designed for immediate exclusion were when the article did not report on teachers' views on inclusive education and its practice, and if the study was not done in the South African context. With regard to the reporting on teachers' views on inclusive education, both first order constructs and secondary order constructs were deemed appropriate – first order constructs are data directly from the sample groups, such as participant



quotes; and second order constructs the data from researcher findings (including researcher interpretations, analysis, statements, assumptions and ideas) (Butler et al., 2016).

The critical appraisal tool was completed by the primary researcher for each article yielded from the search strategy. The completed appraisal tools were provided to the independent researchers for overview and recommendations.

#### 3.2.2.1.5 Step five: Data extraction

After the search for relevant articles was done and the quality appraisal performed, a list of relevant articles was compiled that would form the material for the final synthesis phase of the SLR (Okoli & Schabram, 2010). It is often the case in SLR articles and research that the data extraction phase is not reported, due to it being an assumed sequence towards data synthesis (Okoli & Schabram, 2010). However, a clear data extraction process based on the SLR protocol demonstrates what the SLR includes as data and how it was extracted (Butler et al., 2016). It also enhances the “audit trail” for SLR research as mentioned by Butler et al. (2016) and contributes to research objectivity by means of a structured data extraction approach and by reporting the extraction procedures that followed. For the purposes of this SLR, a data extraction tool was designed to formalise the data extraction process and to capture relevant information and data from the articles included in the SLR (See Annexure B). A data extraction tool facilitates the data extraction process of bibliographical and methodological information, as well as the data related to the research question (Butler et al., 2016; Jesson et al., 2011).

The data relevant to the SLR is the reported views of in-service teachers on the epistemological and ethical applicability of inclusive education, which represents the in-service teachers’ reported ideological underpinnings of inclusive education. The data included was in the form of first order constructs (the quotes from participants of the reviewed studies) and second order constructs (researcher interpretations, deductions and assumptions (Butler et al., 2016; Dixon-Woods et al., 2006). With qualitative and mixed methods studies included in the SLR, both order constructs could be included as data. In the case of quantitative research studies, conducted research would most likely not include questions requiring explicit responses on the viewed ideological underpinnings of inclusive education. Unless the items that formed part of the quantitative study under review made explicit mention of the understanding of inclusive education, the role of knowledge in determining teaching practice or the suggested ethical requirements with respect to inclusive education, care was taken to lend greater weight to second order constructs with regard to quantitative studies. Emphasis on second order constructs with regard to quantitative studies

was considered in order to prevent any undue assumptions made by the researcher that might follow due to the scope of the research instruments used in the reviewed studies.

The data extraction tool consists of the following items:

- biographical information of article;
- first order and second order data constructs on the definition of inclusive education (how it is described and defined);
- first order and second order data constructs ethics of inclusive education (what is required of educators);
- first order and second order data constructs on the epistemological role of inclusive education (how it promotes/hinders learning);
- first order and second order constructs on the role of inclusive education (for unclear references on teacher responsibility or knowledge practices) (See Annexure B).

Articles included for review had to contain data relevant to one of the four data construct categories to be relevant to and of use in the study.

#### 3.2.2.1.6 Step six: Data synthesis

The general aim of synthesising data is to formulate explanatory statements from collected findings for the representation and understanding of the phenomena of interest (Butler et al., 2016). Tong et al. (2012) identify critical interpretive synthesis as one of the common methodologies for the synthesis of SLR data collected from qualitative sources. Dixon-Woods, Agarwal, Jones, Young and Sutton (2005) argue that interpretive synthesis is beneficial in the context of questions that are particularly difficult to address through integrative means alone, such as an amalgamation of quantitative data. They view an interpretive synthesis as being characterised by its “concern with the development of concepts, and with the development and specification of theories that integrate those concepts” (Dixon-Woods et al., 2005, p. 46). The aim of an interpretive synthesis is therefore to form a synthesis of data, from either or both quantitative and qualitative origin (Dixon-Woods et al., 2005), to secure concepts and inform or develop a theory that informatively substantiate or clarifies those concepts.

The methodology for SLR synthesis suggested for this study was a Critical Interpretive Synthesis (CIS), a method of interpretive synthesis applied in instances where the set of categories for critique are properly pre-specified, the data sources are more diverse in form and complexity, and the overall research strategy is aimed at formulating a critique that is empirically and theoretically grounded (Barnett-Page & Thomas, 2009; Dixon-Woods et al., 2006; Tong et al., 2012). CIS was

therefore the applicable form of data synthesis for this study as the epistemological and ethical role of inclusive education was set as pre-specified categories for critique, the data sources took on the form of research focussing on various topics related to inclusive education and were collected from research employing diverse forms of research methodologies, and the primary research question aimed at delivering a critique based the understanding of inclusive education as an ideology.

The data collected through the extraction phase of the SLR (*cf.* 3.2.2.1.v) was systematically reviewed on a line of argument basis synthesis, in other words, the identified first order and second order constructs were used as supporting evidence for the categories of critique, where possible, or applied for the generation of synthetic constructs (Dixon-Woods et al., 2006) (See Annexure C1-C8). Synthetic constructs can be considered as ‘third order constructs’, concepts generated from the underlying evidence that is therefore both representative of the evidence under review and contributory instruments in clarification and argument synthesis (Dixon-Woods et al., 2006). Eleven such synthetic constructs were compiled from the data collected (*cf.* 4.3.3) – sub-themes that addressed the identified main themes of ‘teacher understanding of inclusive education’, ‘the epistemic considerations related to inclusive education’ and the ‘ethical arguments in support or opposition of inclusive education’ (*cf.* 1.2-1.3). The eleven synthetic constructs were reported by means of a GRADE-Confidence in the Evidence from Reviews of Qualitative research (GRADE-CERQual) approach (See Annexure D) – an approach for the enhancement of the quality of qualitative review data synthesis and evidentiary reporting as developed by the Cochrane Library GRADE workgroup (Ames et al., 2017; Odendaal et al., 2020).

### **3.2.2.2 Quality criteria and reporting**

Central to ensuring quality and objectivity of research in the context of an SLR, is the high quality of evidence supplied in terms of the execution of the research protocol (Butler et al., 2016; Jesson et al., 2011; Milner, 2015; Tong et al., 2012). Due to the nature of an SLR, a meta-synthesis research strategy that undertakes to provide evidence-based on other research findings, documentation and accurate reporting of the steps of the SLR is of utmost importance (Cooke et al., 2012; Jesson et al., 2011). Apart from the explicit protocol suggested for this study (*cf.* 3.2.2.1), two other reporting tools were used to enhance transparency and objectivity in the study. In terms of reporting the search protocols results, the screening for inclusion, and the final appraisal for the determining of the included body of eligible research for review, the PRISMA statement was used (See Figure 4-1). The PRISMA statement is a reporting tool that functions as a pictorial representation and a guidance tool for guiding, presenting and reading the data gathering and synthesis procedures in the case of SLRs (Butler et al., 2016; Moher et al., 2009).

The synthesis of the eleven synthetic constructs were reported and evaluated with the use of the GRADE-CERQual approach – which is a qualitative data synthesis reporting approach that summarises sub-themes and measures confidence in findings according to methodological limitations of the studies reviews, coherence of the review findings, the adequacy of the data contributing to the findings, and the relevance of the included studies to the review question (Ames et al., 2017; Odendaal et al., 2020). Aside from GRADE-CERQual, for further enhancement of transparency in the reporting of the synthesis of the data yielded by the SLR, the ENTREQ (Enhancing transparency in reporting the synthesis of qualitative research) statement, as a 21-item tool presented by Tong et al. (2012) (See Annexure E), was applied. Each of the items encased in ENTREQ is covered in depth throughout the study. However, ENTREQ was used as a summary reporting tool to enclose and report on all relevant factors related to the evaluation of a quality SLR at the end of the qualitative phase section in Chapter 4. Both these tools, along with the detailed documentation of critical appraisal of articles and data extraction, were employed to enhance trustworthiness and credibility - identified by Nieuwenhuis (2016) as the key quality criteria for qualitative research. To further trustworthiness and confirmability, which deals with matters of neutrality and objectivity (Nieuwenhuis, 2016), independent researchers reviewed the applied search protocols by repeating it on all applicable databases and evaluated whether the protocol criteria applied to each potential contributing article.

### **3.2.3 Quantitative phase**

As part of a sequential exploratory mixed methods research design, the quantitative phase followed the qualitative phase. The qualitative phase was employed to yield data that was used for the design of the quantitative phase and the construction of its research instrument. In terms of the quantitative phase, the views of pre-service teachers and that of their lecturers were of importance. The research question that aptly guided this phase of the study was secondary question four (4) (*cf.* 1.4.2): What are the views of current pre-service teachers and their lecturers regarding inclusive education as an ideologically rooted pedagogy?

#### **3.2.3.1 Strategy of inquiry**

The purpose of the quantitative phase was to determine whether pre-service teachers and their lecturers hold similar or different ideological positions regarding inclusive education compared to those of in-service teachers. The data yielded by the SLR was therefore employed for the design of the quantitative research instrument, to measure similar or dissimilar trends with regard to pre-service teachers and their lecturers' views on the epistemological and ethical implications for the practice of inclusive education. The method of quantitative research employed was that of a non-experimental survey, for its use as a descriptive research technique administered to a sample of

individuals to ascertain their “attitudes, opinions, behaviours, experiences, or other characteristics of the population” (Mertler, 2016).

### **3.2.3.2 Sampling and ethical clearance**

The sampling method relevant for this phase of the study was non-probability convenience sampling. The purpose of this sample was to gain credible data from pre-service teachers and their lecturers. Convenience sampling was conducted, with both pre-service teachers and their lecturers being approached at the university where the researcher was enrolled for completion of the study (Maree & Pietersen, 2016b). In terms of the sample of pre-service teachers, fourth-year students of the chosen site of research were to be approached through a goodwill arrangement with their lecturer for their education research-related module. This year group was relevant in terms of being representative of the population due to them having had extensive exposure to inclusive education theory and practices, especially in their second and third years of study in the modules EDCC 215 and EDCC 323 (NWU, 2016).

The goodwill arrangement was considered the most efficacious approach due to stringent regulations with regard to approaching students for research purposes during class time. Due to the nature of this study, aiming to obtain robust enough data on a target group that needed sufficient background knowledge of pedagogical practices and inclusive education in particular, a broad enough fourth-year BEd group needed to be approached.

The best opportunity would then have been to approach the students in a module that all fourth-year students attend. Unfortunately, no module in the fourth year of study compulsory to all BEd students directly addresses inclusive education concerns. Additionally, approaching students with research not directly linked to the module and its structure was raised as an ethics concern when ethical clearance was requested from EduRec (see Annexure H), the ethics research committee for education-related studies at the institution where this study was registered. The goodwill arrangement was then designed by the researcher, with the aim of gaining access to the fourth year BEd group of students whilst simultaneously having the research event function as a further pedagogical opportunity within the module that the students were approached in. Only the informed consent procedure, voluntary participation procedure, anonymity guidelines and the structure of the research instrument would have functioned as a pedagogical tool, not the active participation in the research. To avoid ethically dubious research practice through undue influence on voluntary participation procedures and potential pressure contradicting voluntary participation practice, participation through completion of the questionnaire was not to be performed at the time of distribution of the research instrument and participation guidelines were discussed with the students by the independent researcher. Instead, participants would have received the data

instrument to be completed voluntarily, in their own time, in private and to be submitted prior to the subsequent contact session for the module. Unfortunately, due to the Covid-19 pandemic and the ensuing lockdown of the country, this process could not be enacted. A new memorandum of understanding was formed with the Work-Integrated Learning Coordinator of the university for the distribution of the questionnaire via the online learning and teaching platform of the university on the fourth year Work-integrated learning module page, based on the same premises of mutual benefit as stipulated in the original arrangement with the research module (See Annexure G). With the survey questionnaire adapted to an electronic version, this website was deemed the most appropriate channel for inviting potential participants as it included all the fourth-year students that would otherwise have been approached at the particular campus.

In terms of the sample of lecturers, all the BEd lecturers of the same site were approached for participation through a similar goodwill arrangement reached with the resident Deputy Dean of the faculty. All BEd lecturers practicing in South Africa, in order for their lecturing to be relevant within the context of the country, should have knowledge of the education policy of the country and its promoted education practices, including the country's endorsement of inclusive education (Department of Education, 2001). The whole group of fourth-year students, 300+ students (N1=300), was approached to partake in the research through the online learning and teaching platform of their university. The final participation count was 56 (N1=56). The sample for lecturers included lecturers of the faculty at the same site and was therefore a significantly smaller sample group (N2=40) – with the final participation as 17 (N2=17). The sample groups took part in the study in the same month.

### **3.2.3.3 Data collection method and instrument**

The instrument used for data collection from both samples was a self-constructed questionnaire (See Annexure L and M). The items of the questionnaire, aside from any biographical information, were designed based on the findings yielded by the SLR. The themes derived from the data collected, analysed and interpreted in the SLR informed the design of the research instrument. Both the sampled pre-service teachers and the lecturers therefore completed the same questionnaire, differing only in terms of biographical information that was included. The surveys were completed at the participants' own convenience. Pre-service teachers were to be approached at the end of a scheduled class period whilst the lecturers were to be approached on an individual basis, to allow for completion of the surveys at their convenience. Due to the Covid-19 pandemic and the lockdown that ensued in its wake in South Africa, the data collection methods were no longer appropriate. The surveys were adapted into online surveys on the QuestionPro application. Due to the shift from physical surveys to online surveys, the informed participation document was embedded into the survey as an introductory page to be signed

electronically. The link to the online questionnaire was distributed by an independent researcher, via a specific module on the university learning and teaching online platform and via a group email granted access to by the Deputy Dean of the specific campus' education faculty (See Annexure F). The data procured by the online survey tool was downloaded by the independent researcher and provided to the appointed qualified statistician.

The questionnaire was designed in the form of a 4-point Likert scale, an ordinal measurement tool for measuring a respondent's attitude towards the event or topic in question (Maree & Pietersen, 2016). The reason for a 4-point Likert scale, was to avoid respondents from "hiding" through middle option selections (Maree & Pietersen, 2016). The purpose of this instrument was to measure the similarities and divergences between the findings of the qualitative study and the position held by pre-service teachers and their lecturers. The time that was required for the completion of the questionnaire did not exceed thirty minutes, as verified by the timeframe and viability test done through the pilot study of the surveys.

#### **3.2.3.4 Data analysis**

The collected data from the survey was statistically analysed and illustrated with the help of a qualified statistician in service of the Optentia research unit. The data collected from the questionnaires was analysed and presented by means of descriptive and inferential statistics. Descriptive statistics are utilised to provide a summary of the general nature of research data (Leedy & Omrod, 2005), while inferential statistics allows the researcher to draw statistically valid inferences from the data (McMillian & Shumacher, 2010). Inferential statistics are dependent on descriptive statistics (McMillian & Shumacher, 2010), with inferential statistics functioning as an efficacious tool for comparative analysis of the variables of interest between different groups (Creswell, 2012). Descriptive analysis therefore provides valuable data on a variable-by-variable basis (Punch, 2014), whilst inferential analysis makes use of this data to provide valuable inferences about the overarching population based on the data from the samples and the comparison between the sample groups (Fraenkel & Wallen, 2008). These statistical strategies were represented numerically (mean, mode or median), thereby depicting the frequency counts and percentages obtained from the calculations of the statistician.

#### **3.2.3.5 Quality criteria**

Reliability for quantitative research instruments refers to the "extent to which a measuring instrument is repeatable and consistent" (Maree & Pietersen, 2016b, p. 184). Reliability was ensured as the researcher made use of a qualified independent statistician to assist with consultation in terms of the validity and clarity of the questionnaire items and assisted in avoiding

research bias by handling and processing the quantitative data. Validity of an instrument, however, refers to the extent to which the instrument measures what it is supposed to measure (Maree & Pietersen, 2016b). A pilot study was conducted with four respondents (three pre-service teachers and one lecturer) that share similar characteristics to the sampled respondents but did not form part of the main research study. The pilot study allowed for an audit phase with regard to the research instrument, thereby advancing the reliability and validity of the study.

In order to ensure construct validity, the data collected from the questionnaires were initially analysed by means of a confirmatory factor analysis, a specialised branch of factor analysis that tests the measure of constructs against the latent variables representative of the hypothesis of the researcher (Harrington, 2009; Knoke, 2005). The statistician reported that the factors did not neatly fit the sections and recommended an exploratory factor analysis. The statistician suggested that an exploratory factor analysis be done instead – where underlying variables that could be drawn from the data are highlighted (Byrne, 2012; Knoke, 2005; Wang & Wang, 2020) – which led to the suggestion of an adjusted factor structure (*cf.* 4.4.4). The statistical software used was *Mplus* 8.6 (Muthén & Muthén, 1998-2021).

### **3.3 Ethical considerations**

In terms of the qualitative phase, ethical considerations related to the study involved accurate and non-biased reporting of the research conducted. The robust research protocol suggested for the SLR and the employed research and reporting tools is the means by which the researcher ensured objective, scientific research practices that mitigated bias. Independent researchers were also involved in testing the efficacy of the research protocol and in ensuring that the research and reporting tools were objectively employed and accurately presented.

In terms of the quantitative phase, ethical clearance for the proposed survey was sought from EduRec, the relevant ethics committee at the higher education institute through which the study was conducted. Once ethical clearance was received from the ethics committee (see Annexure H), along with the ethics approval number, the RDGC was approached for permission to approach students and lecturers for the quantitative phase data collection (see Annexure I). Once both ethical clearance and permission were received, the intended respondents were approached for voluntary and informed participation. Informed consent was required from each participant within the online questionnaire, where they agreed to participate voluntarily in the research process (Mertler, 2016). Part of the voluntary structure of participation included the respondents being informed that they could withdraw from the research project at any point while answering the questionnaire (Mertler, 2016). To eliminate possible bias, the recruitment of respondents, as well as the dissemination and collection of data, were done by an independent researcher.



Before granting consent, potential respondents received a full and detailed explanation as to the nature and purpose of the research, as well as to what they will be agreeing to when they take part in the research, through an advertisement that preceded the sharing of the link to the questionnaire. The same information was included within the online questionnaire. An essential ethical aspect when doing research involving respondents is the issue of the protection of identities (Maree, 2016). By means of an online questionnaire, participants were able to take part anonymously and their identities and individual participation were kept confidential throughout the whole process.

### **3.4 Conclusion**

In this chapter, the research design was detailed. As an exploratory mixed methods design, the study will consist of two phases of data collection. The first, qualitative phase will take on the form of a SLR. A detailed protocol for the SLR research was designed and the reporting tools detailed. The sequential data collection phase will be a quantitative method of research. Although both data collection phases hold equal weight for the final critical interpretation and argument, the study is an exploratory mixed methods design due to the quantitative phase's instrument being dependent on the results found in the qualitative phase for the construction of its items. Due attention was given to quality criteria and ethical considerations, in order to entrench the trustworthiness, objectivity, credibility and validity of the research to be conducted. In the following chapter, the proposed research design will be employed according to the guidelines and protocols suggested in this chapter.

## **CHAPTER 4 - DATA ANALYSIS AND FINDINGS**

### **4.1 Overview of chapter**

This chapter documents the mixed methods research conducted to answer the primary research question. The research design is a sequential exploratory mixed methods design, with findings in the qualitative phase employed for the construction of the quantitative phase research instrument. The qualitative phase takes on the form of an SLR, focussing on research already conducted within the context of interest to inform on the phenomenon of interest. The sequential quantitative phase is a survey questionnaire sequentially conducted after the qualitative phase, but of which the results will function in tandem and as comparison to inform on the primary research question. All evidence to ensure trustworthiness, objectivity, credibility and validity of the research conducted will be included or referenced to within this chapter.

### **4.2 Sequential exploratory mixed methods design**

A sequential exploratory mixed methods design is a research design where a qualitative research strategy is employed as an outreach for gaining information on a phenomenon for further testing and clarification in a subsequent quantitative phase (Punch, 2014). This does not mean that the sole purpose of the qualitative phase is for its employment purely for the design of a subsequent quantitative design, but rather that both strategies are employed to more expansively inform on the phenomenon of interest and build upon and inform on the data obtained in each phase (Mertler, 2016; Punch, 2014).

This study endeavoured to answer the primary research question, “How might our understanding of inclusive education as an ideology promote its application in the South African educational environment?”, by means of obtaining data on the three parties involved with the implementation of inclusive education in the South African educational environment – in-service teachers, lecturers and pre-service teachers. The qualitative phase was a SLR that collected data on the views held by in-service teachers pertaining to the ideological underpinnings of inclusive education. The quantitative phase was a survey questionnaire that collected data from the sample pools of pre-service teachers and lecturers on the same ideological underpinnings. These two data sets provided rich data for a critical interpretive comparison and the primary critical argument on the applicability of inclusive education along ideological grounds (See Figure 3-1).

### **4.3 Qualitative phase – SLR executed protocol**

In Chapter 3 a detailed research protocol was developed (*cf.* 3.2.2.1) - a recommended strategy for the purpose of structuring a high quality SLR study that had sufficient, efficacious and

transparent reporting tools in order to limit researcher bias and promote objectivity and credibility (Butler et al., 2016; Okoli & Schabram, 2010; Tong et al., 2012). The research protocol was designed from the six steps for SLR research protocols as suggested by Butler et al. (2016) (*cf.* Table 3-3). Step one, 'Decide on topic and aim', was evaluatively applied in Chapter 3 (*cf.* 3.2.2.1.1) and the topic and aim were substantiated and proven relevant for the SLR. For step two, 'Develop search strategy', a detailed search strategy was developed using the SPIDER search tool as guiding instrument (*cf.* 3.2.2.1.2). The key search terms were established as follows:

**Table 4-1: Search terms and limitations**

S-Sample	PI-Phenomenon of Interest	D-Design	E-Evaluation	R-Research type
"teacher*" OR "in-service educator*" OR "educator*" AND "South Africa"	"Inclusive education" OR "special needs education" OR "inclusive pedagogy"	Any design eliciting views of teachers on inclusive education relevant	"perceptions" OR "attitudes" OR "beliefs" OR "views" OR "experience*"	Limitations: Only journal articles. Only published post-2001.

The final search string determined in Chapter 3 (*cf.* 3.2.2.1.3), which was read into the search engines of the relevant databases using Boolean operators, reads as follows: (teacher\* OR educator\*) AND ("inclusive education" OR "special needs education" OR "inclusive pedagogy") AND "South Africa" AND (attitude\* OR perspective\* OR belief\* OR attitude\*). To ensure articles addressing the phenomena of interest were targeted, but also that no unnecessary articles related to phenomena of interest were excluded, only the P category string ("inclusive education" OR "special needs education" OR "inclusive pedagogy") was required to appear in the title. It was found that the exclusion criteria do not have to be included as 'NOT' Boolean phrases, as the databases have a date of publication and searches among accredited journals as functions to be selected when reading in search terms.

The search was conducted as a manual search using different academic search engines to acquire relevant articles for review. Should the search strategy have failed to yield sufficient

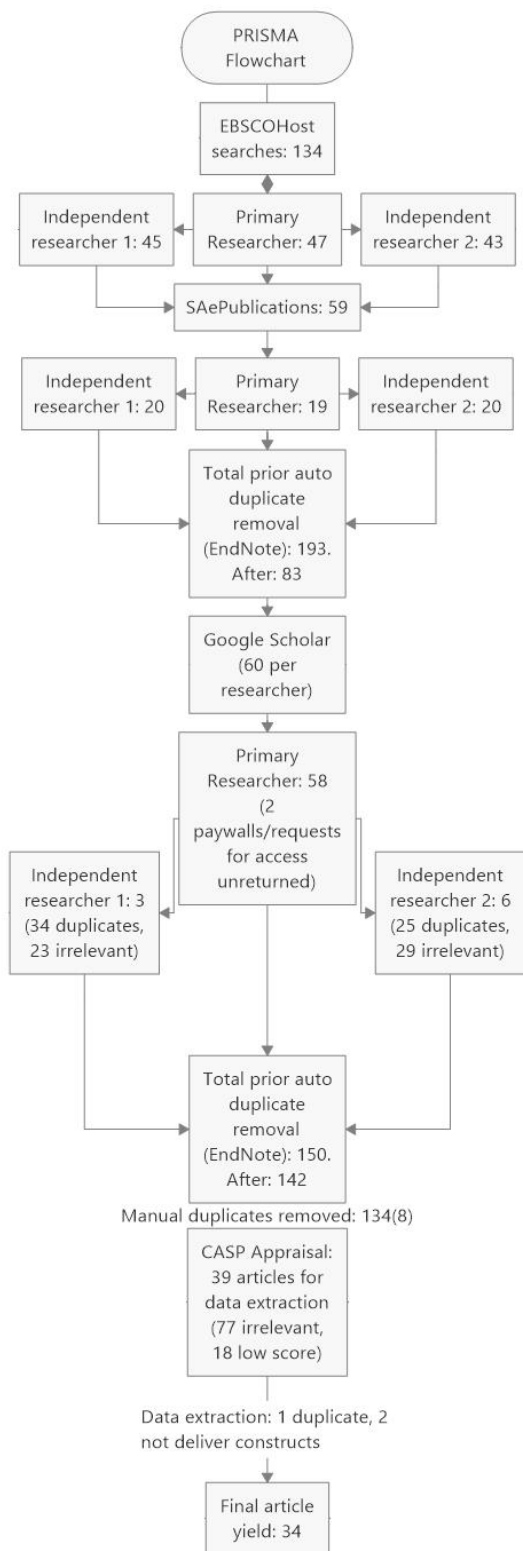
results or too many hits for unrelated material were a consequence of the applied search strategy, step two of the research protocol would have been revisited for refinement. Sections 4.3.1 to 4.3.4 will follow the subsequent four steps of the six-step SLR research protocol as suggested in Chapter 3 (*cf.* 3.2.2.1).

#### **4.3.1 Executing search and collection of research material**

The search for relevant material was conducted by the researcher and two independent researchers, in order to ensure trustworthiness in terms of the executed search strategy but also to ensure that no potentially relevant material was excluded (Milner, 2015). For the endorsement of the scientific viability and objectivity of the SLR (Butler et al., 2016; Okoli & Schabram, 2010), all yielded results of the executed search strategy along all databases were recorded. Aside from the search results, detailed records were kept of the dates and times the searches were done. The PRISMA flowchart (Moher et al., 2009) was compiled as a visual representation of the final search results and further search, analyses and synthesis refinement procedures (see Figure 4-1 on p.62).

The search strategy was executed by the researcher per research database on different dates and times and all hits were recorded. This was followed by independent Researcher One and Two on different dates and times. The databases consulted were EBSCOHost, Sabinet African Journals (formerly SAePublications), and Google Scholar. Within EBSCOHost, the following databases were included: Academic Search Complete, Africa-Wide Information, E-Journals, ERIC, MasterFILE Premier, and Teacher Reference Center. Results on EBSCOHost and Sabinet African Journals resulted between 19 and 47 hits for each researcher (See Figure 4-1). However, Google Scholar yielded thousands of hits. A brief overview made it clear that the majority of articles yielded were not relevant to the study and that Google Scholar was ordered according to relevance. It was decided that the first 60 articles for each search would be included for review for inclusion of the study, an extra 13 above the highest search yield on the other engines.

After comparing and finalising the final totals for the articles across all databases, duplicates of articles were removed from the final list of yielded research material. The final count for yielded research material was 134 articles for appraisal, as indicated on Figure 4-1 prior to CASP appraisal.



**Figure 4-1: PRISMA flowchart for search strategy**

### **4.3.1 Critical appraisal of research material**

The critical appraisal phase of the SLR search is applied to verify the relevance and methodological soundness of the screened articles and to determine which articles would proceed to the data extraction phase (Bettany-Saltikov, 2010; Butler et al., 2016). To measure relevance for inclusion, a clear critical appraisal protocol was developed in Chapter 3 (*cf.* 3.2.2.1.4) (See Annexure A), based on the CASP checklist (CASP, 2018), with a scoring or ranking system that indicates the quality of studies considered for the SLR (Butler et al., 2016). After collecting the full text of the articles, the checklist was applied for each of the 134 articles yielded from the search strategy (See Annexure J). Of the nine items on the checklist, two components were designed for immediate exclusion - when the article did not report on teachers' views on inclusive education and its practice, and if the study was not done in the South African context. Of the 134 articles, 77 were immediately excluded in accordance with the two components. After further appraisal, a further 18 scored too low on quality appraisal according to the researcher. All articles marked for inclusion and exclusion and their quality appraisal forms were given to the two independent researchers for review and approval prior to continuing with the SLR. The final list of articles for the data extraction phase was then compiled (See Annexure K). During the data extraction phase, a further two articles were rejected for not containing first- or second order constructs directly related to teacher perceptions of IE, leading to a total of 34 articles that formed part of the SLR.

### **4.3.2 Data extraction**

In Chapter 3, a data extraction tool was designed to formalise the data extraction process and to streamline the capture of relevant information and data from the screened and appraised articles (*cf.* 3.2.2.1.v). The data relevant to the SLR is the reported views of in-service teachers on the epistemological and ethical applicability of inclusive education, which represents the in-service teachers' reported ideological underpinnings of inclusive education. Both first order constructs and second order constructs were deemed relevant (*cf.* 3.2.2.1.v) and were recorded on the data extraction tool per article (See Annexure B). To accrue relevant data on the reported views of in-service teachers on the epistemological and ethical applicability of inclusive education, four general themes were used for identifying and extracting data:

- First order- and second order constructs on the definition of inclusive education, i.e. how inclusive education was described by teachers;
- First order- and second order constructs that made reference to epistemological or teaching practice claims with regard to inclusive education;
- First order- and second order constructs that made reference ethics or responsibility claims with regard to inclusive education.

- First order- and second order constructs that made reference to what the role of inclusive education is or should be.

These four general categories were deemed appropriate themes as it highlighted the ideological underpinnings influencing understanding and application of inclusive education as discussed in Chapter 1 and 2 (*cf.* 1.2, 2.3). The fourth theme was included for cases where the purpose or influence of inclusive education was noted – a more indirect expression of inclusive education practice concerns taken up in the first three themes. Findings yielded in the final theme were included in the synthetic constructs formulated from the synthesis of the first three themes or were discarded – to prevent posteriori third order constructions that was not directly linked to the ideological underpinnings researched.

In the case of quantitative studies, only the inclusion of second order constructs was considered. This was done in order to prevent any undue assumptions from being made by the researcher when reviewing statistical- or instrumental first order data constructs – assumptions that may inform on the themes of this study but not necessarily follow from the methodological context of the statistical- or instrumental data of the reviewed studies. Furthermore, as a qualitative SLR, the search, extraction and evaluation tools were uniquely suited for qualitative data and, therefore, rather the researchers' deductions and conclusions drawn from their quantitative research.

Of the extracted data, the following first- and second-order constructs repeated (See Annexure D):

- Reference to barriers to learning best addressed through specialist care due to restrictions posed by barriers for the child(ren);
- That inclusive education is understood by some as only the physical inclusion of learners who experience barriers to learning in 'normal' classrooms;
- That teachers in South Africa recognise that inclusive education refers to inclusion for all learners and is based on the concept of human rights, supported by the South African constitution;
- That teachers argue that inclusive education as epistemological practice is best suited for specialised settings with specialised curricula - that inclusion of learners with barriers in all schools, especially if the learners cannot adjust to the status quo, will only dilute or interrupt typical teaching practice and learning;
- That in settings where inclusive education was seen and applied as an adjusted teaching practice, that it yielded positive learning and development results even within the current curriculum structure;
- That the majority of claims against inclusive education as a valid teaching practice is contested on grounds of pre-existing systemic issues, thereby not including inclusive education as a possible resolution to these issues;

- That inclusive education is understood as both a human right and an ethical responsibility by educators and education institutions; but those arguments go in the direction then of arguing for specialised, separate settings rather than inclusion in inclusive education practice.

These repeated constructs would come to form the third order constructs for the study.

### **4.3.3 Data synthesis**

In Chapter 3 it was argued (*cf.* 3.2.2.1.4) that a CIS was ideal for this SLR on the grounds that the categories for critique, the ideological roots of ethics and epistemology, are properly pre-specified; the data sources originate from both quantitative and qualitative studies of various levels of complexity; and the overall research strategy is aimed at formulating a critique of ideological views on inclusive education that is empirically and theoretically grounded. The data collected through the extraction phase of the SLR was systematically reviewed on a line by line basis for synthesis (Tong et al., 2012). First order constructs and second order constructs were coded. Both first order and second order constructs contributed in the formulation of the synthesised themes, or synthetic constructs (Dixon-Woods et al., 2006). Neither first- or second order constructs yielded wildly different results or phenomena under any of the identified themes for data extraction - indicating, at least in terms of the application of the data extraction tool, that even second order constructs within other meta-reviews were in line with first order constructs and second order constructs of first-hand research studies.

Synthetic constructs, 'third order constructs', concepts generated from the underlying evidence that are therefore both representative of the evidence under review and contributory instruments in clarification and argument synthesis (Dixon-Woods et al., 2006), were yielded. These constructs are the reported review findings. These findings include nine synthetic constructs that addressed the identified main themes related to the ideological underpinnings of inclusive education, namely: 'teacher understanding of inclusive education', 'epistemic considerations related to inclusive education' and 'the ethical arguments in support or opposition of inclusive education' (*cf.* 1.2-1.3). The nine synthetic constructs were reported by means of the GRADE-CERQual approach, for the enhancement of clarity in reporting as well as the enhancement of the quality of the qualitative review data synthesis performed (Ames et al., 2017; Odendaal et al., 2020).

#### **4.3.4.1 Reports on data synthesis and findings**

The following GRADE-CERQual data synthesis reports were drafted based on the extracted data:



**Table 4-2: Synthesis Findings Report 1 - IE for specialist care/Deficit model**

Review Finding	Studies contributing to finding	Constructs from articles	Assessment of Methodological Limitations	Assessment of Adequacy	Assessment of Coherence	Assessment of relevance	Overall CERQual Assessment of Confidence	Explanation of Judgement
IE for specialist care/Deficit model - first order and second order constructs reveal a persistent expectation from teachers that separate specialised care structures should exist for learners who experience barriers to learning. Repeated references to 'they' having to have specialised classrooms and specialised care structures due to 'their conditions/who they are'. The role indicated for IE is to apply the best specialised judgements to determine which environments and care suit which learners (medical model practices of screening for separating).	2, 3, 16, 18, 23, 27, 34, 39, 49, 52, 76, 79, 81, 84	1st order: 10, 2nd order: 11	High - CASP process already applied weeding low methodological trust papers. Also, majority of articles scored 8+ in process.	High - tracks in articles from 2003 up to 2019	High - reflects preceding research and high occurrence rate over diverse research methodologies.	High - connects with view that understanding of IE will inform epistemic and ethical standpoint, and vice versa.	High confidence	Repeated first order construct, 2nd order construct and theoretical reference to medical model stance or promotion of separate, specialised care.

Table 4.2 Synthesis Findings Report 1 - IE for specialist care/Deficit model

**Table 4-3: Synthesis Findings Report 2 - Basic 'inclusion' with the 'normal'**

Review Finding	Studies contributing to finding	Constructs from articles	Assessment of Methodological Limitations	Assessment of Adequacy	Assessment of Coherence	Assessment of Relevance	Overall CERQual Assessment of Confidence	Explanation of Judgement
Basic 'inclusion' - with the 'normal' - Teachers indicating that IE is a process of placing learners experiencing barriers to learning in 'everyday' classrooms - but merely as practice of physical inclusion only, and not that IE envisions educational adjustments for all.	18, 24, 81, 84	1st order constructs: 4, 2nd order constructs: 1	High - connects with disparate viewpoints on IE and deficit model reactions - teachers oppose inclusion as learners won't 'fit'.	Moderate - reflects preceding research, but fewer explicit reports of this stance taken made by teachers. versa.	High - connects with view that understanding of IE will inform epistemic and ethical standpoint, and vice versa.	Moderate: Other review findings indicate that this is the position held by most - that education changes through physical inclusion of learners experiencing barriers to education and not education adjusting to include all learners.	Moderate confidence	

Table 4.3 Synthesis Findings Report 2 - Basic 'inclusion' - with the 'normal'

**Table 4-4: Synthesis Findings Report 3 - Rights foundation of IE/Education for all**

Review Finding	Studies contributing to finding	Constructs from articles	Assessment of Methodological Limitations	Assessment of Adequacy	Assessment of Coherence	Assessment of relevance	Overall CERQual Assessment of Confidence	Explanation of Judgement
Rights foundation of IE/Education for all - Teachers and researchers reporting that IE is founded on the rights of learners for inclusion in general society and that it has a role to play in terms of both inclusion and acceptance.	20, 23, 26, 28, 47, 57, 69, 77, 81, 103, 108, 111, 115	1st order constructs: 7, 2nd order constructs: 9	High - CASP process already applied weeding low methodological trust papers. Also, majority of articles scored 8+ in process.	High - tracks especially in articles from 2011 up to 2019 (when the discourse of IE in SA schools would have been more widespread )	High - reflects preceding research and high occurrence rate over diverse research methodologies.	High - connects with view that understanding of IE will inform epistemic and ethical standpoint, and vice versa.	High confidence	Repeated first order construct, 2nd constructs and theoretical reference to teachers in SA supporting the rights-based foundation of IE and principles of inclusion in society.

Table 4.4 Synthesis Findings Report 3 - Rights foundation of IE/Education for all

**Table 4-5: Synthesis Findings Report 4 - Epistemic limitations/unquestioned Curricula or teaching practice: Learners should 'fit' in / Not normal**

Review Finding	Studies contributing to finding	Constructs from articles	Assessment of Methodological Limitations	Assessment of Adequacy	Assessment of Coherence	Assessment of Relevance	Overall CERQual Assessment of Confidence	Explanation of Judgement
Epistemic limitations/unquestioned Curricula or teaching practice: Learners should 'fit' in / Not normal - Teachers in opposition to IE reference that the curriculum and general teaching practice is not ideal for learners with barriers. The issue is not 'traditional teaching practice', the problem is that learners cannot learn like 'normal' learners.	2, 23, 26, 27, 34, 47, 49, 52, 57, 63, 79, 81, 92,	1st order constructs: 9, 2nd order constructs: 8	High - CASP process already applied weeding low methodological trust papers. Also, majority of articles scored 8+ in process.	High - tracks in a variety of articles from 2011 to 2020	High - reflects preceding research and high occurrence rate over diverse research methodologies.	High - addresses epistemic underpinning for IE directly	High confidence	Repeated first order construct, 2nd order construct and theoretical reference to teachers in SA expecting learners to fit curricula and that learners experiencing barriers to learning cannot be 'taught' in 'normal' classes.

**Table 4.5 Synthesis Findings Report 4 - Epistemic limitations/unquestioned curricula or teaching practice : Learners should 'fit' in / Not normal**

**Table 4-6: Synthesis Findings Report 5 - Epistemic limitations/unquestioned Curricula or teaching practice: Specialised curricula/practices required**

Review Finding	Studies contributing to finding	Constructs from articles	Assessment of Methodological Limitations	Assessment of Adequacy	Assessment of Coherence	Assessment of Relevance	Overall CERQual Assessment of Confidence	Explanation of Judgement
Epistemic limitations/unquestioned Curricula or teaching practice: Specialised curricula/practices required - Teachers indicating that learners experiencing barriers to learning require specialised curricula and assessments that supports separate teaching and learning opportunities and spaces.	16, 18, 29, 57, 61, 63, 77, 79	1st order constructs: 5, 2nd order constructs: 5	High - CASP process already applied weeding low methodological trust papers. Also, majority of articles scored 8+ in process.	High - tracks in a variety of articles from 2011 to 2020	High - reflects preceding research and high occurrence rate over diverse research methodologies.	High - addresses epistemic underpinning for IE directly	High confidence	Repeated first order construct and 2nd order construct referring to teachers in SA adapting for or requesting additional training for separate learning practices for learners experiencing barriers to learning.

**Table 4.6 Synthesis Findings Report 5 - Epistemic limitations/unquestioned curricula or teaching practice: Specialised curricula/practices required**

**Table 4-7: Synthesis Findings Report 6 - Epistemic limitations/unquestioned Curricula or teaching practice: Weaker curriculum/does not fit requirements**

Review Finding	Studies contributing to finding	Constructs from articles	Assessment of Methodological Limitations	Assessment of Adequacy	Assessment of Coherence	Assessment of Relevance	Overall CERQual Assessment of Confidence	Explanation of Judgement
Epistemic limitations/unquestioned Curricula or teaching practice: Weaker curriculum/does not fit requirements - Teachers indicating that IE cannot be applied as it will dilute the current curriculum to feed the needs of those experiencing barriers to learning.				High - correlates with preceding categories on expecting learners to 'fit in' (reluctance to adjust curricula) and preference for specialised classrooms and curricula.	High - reflects preceding research and correlates with other epistemic-related claims and expectations reported on.	High - addresses epistemic underpinning for IE directly	Moderate confidence	Although these responses correlate with other epistemic claims, fewer explicit constructs on the matter. However, further clarifies teacher expectations/arguments for specialised practices rather than inclusion.
	2, 18, 19	2nd order constructs only (4)	High - CASP process already applied weeding low methodological trust papers.					

Table 4.7 Synthesis Findings Report 6 - Epistemic limitations/unquestioned curricula or teaching practice: Weaker curriculum/does not fit requirements

**Table 4-8: Synthesis Findings Report 7 - Epistemic limitations/unquestioned Curricula or teaching practice: Not considered IE as relief**

Review Finding	Studies contributing to finding	Constructs from articles	Assessment of Methodological Limitations	Assessment of Adequacy	Assessment of Coherence	Assessment of Relevance	Overall CERQual Assessment of Confidence	Explanation of Judgement
Epistemic limitations/unquestioned Curricula or teaching practice: Not considered IE as relief - Teachers note various reasons that impede IE as teaching practice based on exiting teaching/learning issues ranging from systemic issues such as overloaded classrooms, additional workload diverse learners may suggest, training gaps for specialised lesson presentations etc. Noted here is that IE is not viewed as an instrument to help solve current teaching/learning issues, but is viewed as an additional strain.	2, 6, 19, 24, 27, 43, 52, 57, 61, 76, 79, 84	1st order constructs: 9, 2nd order constructs: 7	High - CASP process already applied weeding low methodological trust papers. Also, majority of articles scored 8+ in process.	High - tracks in articles from 2003 up to 2020	High - reflects preceding research and high occurrence rate over diverse research methodologies.	High - addresses epistemic underpinning for IE directly	High confidence	Repeated first order and 2nd order constructs referring to teachers IE as additional impediment rather than resolution.

Table 4.8 Synthesis Findings Report 7 - Epistemic limitations/unquestioned curricula or teaching practice: Not considered IE as relief

**Table 4-9: Synthesis Findings Report 8 - Adjusted curricula/teaching practice for IE success**

Review Finding	Studies contributing to finding	Constructs from articles	Assessment of Methodological Limitations	Assessment of Adequacy	Assessment of Coherence	Assessment of relevance	Overall CERQual Assessment of Confidence	Explanation of Judgement
Adjusted curricula/teaching practice for IE success - In more recent articles, teachers have been adapting their approach to the curriculum and their own teaching practices - reporting greater success for IE and education in general. In two cases, explicit mention is even made on how traditional/medical model-based practices impede teaching and learning.	16, 20, 52, 69, 81, 92, 108, 113 115,	1st order constructs: 9, 2nd order constructs: 4	High - CASP process already applied weeding low methodological trust papers. Also, majority of articles scored 8+ in process.	High - tracks in articles from 2011 up to 2019 (when the discourse of IE in SA schools would have been more widespread and impacted more schools directly)	High - reflects preceding research and high occurrence rate over diverse research methodologies.	High - addresses epistemic underpinnings for IE directly	High confidence	Repeated first order construct, 2nd order construct and theoretical reference to teachers in SA experiencing success when adjusting teaching practices in general in response to diverse learner groups.

Table 4.9 Synthesis Findings Report 8 - Adjusted curricula/teaching practice for IE success



**Table 4-10: Synthesis Findings Report 9 - IE as Human Rights responsibility**

Review Finding	Studies contributing to finding	Constructs from articles	Assessment of Methodological Limitations	Assessment of Adequacy	Assessment of Coherence	Assessment of relevance	Overall CERQual Assessment of Confidence	Explanation of Judgement
IE as Human Rights responsibility - teachers indicate that IE is understood as a human rights issue (connected with policy and the constitution). Teachers and the institution therefore have a responsibility to include barriers to learning (although the definition of on inclusion differs dramatically - as seen in the other themes).	23, 26, 28, 57, 77	1st order constructs: 1, 2nd order constructs: 5	High - CASP process already applied weeding low methodological trust papers. Also, majority of articles scored 8+ in process.	High - tracks in a variety of articles from 2011 to 2020	High - reflects preceding research and occurrence rate over diverse research methodologies.	High - addresses ethical underpinnings for IE directly	High confidence	Strong general occurrence, especially in comparative studies between different countries. Also correlated with the defining of IE theme, here it is also noted that there is responsibility to address the learning of learners experiencing barriers to learning, albeit potentially in separate environs.

Table 4.10 Synthesis Findings Report 9 - IE as Human Rights responsibility

**Table 4-11: Synthesis Findings Report 10 - Prohibits ethical teaching practice (Focus away from 'normal')**

Review Finding	Studies contributing to finding	Constructs from articles	Assessment of Methodological Limitations	Assessment of Adequacy	Assessment of Coherence	Assessment of relevance	Overall CERQual Assessment of Confidence	Explanation of Judgement
Prohibits ethical teaching practice (Focus away from 'normal') - In some studies there are teachers who hold the ethical argument that inclusion in 'normal' environments is the morally dubious approach. They argue that IE creates unfair situations in contemporary, competitive, meritocratic, 'normal' classrooms for learners experiencing barriers to learning; adds additional time and training demand for teachers to be enabled to do specialised individual teaching; and that all this leads to additional individualised attention for struggling learners which detracts from the responsibility towards the 'normal' learners.	2, 27, 34, 43, 49, 57, 76, 81	1st order constructs: 7, 2nd order constructs: 2	High - CASP process already applied weeding low methodological trust papers. Also, majority of articles scored 8+ in process.	High - tracks in a variety of articles from 2011 to 2020	High - reflects preceding research and occurrence rate over diverse research methodologies.	High - addresses ethical underpinnings for IE directly	High confidence	Majority first order constructs of teachers addressing the issue of inclusion in terms of duties.

Table 4.11 Synthesis Findings Report 10 - Prohibits ethical teaching practice (Focus away from 'normal')

**Table 4-12: Synthesis Findings Report 11 - IE is idealistic, not practical**

Review Finding	Studies contributing to finding	Constructs from articles	Assessment of Methodological Limitations	Assessment of Adequacy	Assessment of Coherence	Assessment of relevance	Overall CERQual Assessment of Confidence	Explanation of Judgement
IE is idealistic, not practical - In two recent studies, researchers noted that teachers saw IE only as an ideal, but not a priority to be pursued.	2, 57	Only 2nd order constructs (5)	High - Both articles scored 9 in CASP appraisal.	Moderate - not high rate of occurrence, but both very recent articles	Moderate - although it is an accounted for occurrence in preceding research, only two recent studies explicitly reference it as an idealistic notion	High - addresses ethical and epistemic underpinnings for IE directly	Moderate to minor confidence	Moderate: Occurrence was predicted and is accounted for in the preceding research, but only explicitly referenced in two recent studies. Stance, however, correlates argument for ethical responsibilities to the 'normal' children in teaching and inclusion as human rights responsibility, albeit meaning inclusion in specialised settings.

Table 4.12 Synthesis Findings Report 11 - IE is idealistic, not practical

Reports 1 through 3's findings report primarily on teachers' understanding of inclusive education – what it means and how it should be understood in application (See Table 4-2 to 4-4). Reports 4 through 8's findings report on epistemic and teaching practice matters related to inclusive education by teachers (See Table 4-5 to 4-9). Reports 9 through 11's findings report on the ethical claims and guidelines related to inclusive education by teachers (See Table 4-10 to 4-12).

Several of the extracted data entries could refer to more than one category but were placed with the sub-theme that was more closely related to the explicit references to inclusive education, knowledge or teaching practice, or responsibilities that were made in the first- or second order construct. That sub-theme results would be closely related and were to be expected, as indicated in Chapters 1 (*cf.* 1.2) and 2 (*cf.* 2.3-2.4), due to the fact that the ideological underpinnings are intertwined and inform each other and are therefore not easily separated. For example, an epistemological claim can be justified as an ethics query – as seen in article 34 (See Annexure K for article list):

*“Now why must you teach the child something that you know he will not be able to do in 20 years’ time?” (p. 10)*

The statement in the leading question is that, epistemologically speaking, the knowledge is not valid for the students with barriers to learning referred to. However, it is framed as an ethical query in the sense that it implies that the ethical duty lies in teaching the knowledge that will suit the learner in terms of the projected limitations brought on by the barriers to learning. In cases such as these, seeing as the first order leading question or claim alludes to knowledge, the data was included under the epistemological claims category.

**i) Finding 1: Inclusive education understood in context of medical deficit model**

As indicated by the preliminary research (*cf.* 1.2 – 1.3 and 2.4), inclusive education was still reportedly understood by a great many teachers as a practice for specialised learning in specialised settings. They, therefore, do not deviate from the traditional medical deficit model approach of space and curriculum for the specific group of learners separate from the ‘normal’ learners:

*“We cannot teach learners with disabilities; they must go to special schools.” (Article 52, p.131)*

*“... and the learner gets transferred to a school where he or she will fit.” (Article 76, p.911)*

In this context, the role relegated to inclusive education is solely a practice of specialists making judgments to determine which environments and specialised care is best situated for the learner experiencing barriers – an unchanged model from the ‘special school’, medical deficit model of education practice that predates EWP6 (*cf.* 2.2.2).

*“Bell-curve thinking permeates the understanding of inclusive education... promoting specialised settings according to need...” (Article 2, p.10).*

*“In some schools their understanding of what constituted an inclusive school appeared to be related directly to the provision of a special classroom rather than their willingness to accept all learners from their community.” (Article 18, p.651)*

**ii) Finding 2: Inclusive education understood in terms of basic inclusion without adjusted practice**

The second understanding held by teachers is that inclusive education is the physical inclusion of learners who experience barriers to learning within ‘normal’ schools, but with the added requirement of the learner having to fit into the programme. Thus, inclusion is viewed as a requirement, set by policy or understood as human right, but traditionalist teaching practices persist and adaptation to address barriers to learning does not occur.

*“... mix them [disabled learners] with those that are ‘normal’ in the mainstream class” (Article 81, p.362)*

*“In other schools they considered inclusion to be simply the acceptance of students with disabilities into their schools.” (Article 18, p.651).*

This finding scored a moderate confidence assessment through the GRADE-CERQual process (Table 4-3). However, this finding is supported by Finding 8 and 10, through the contestation voiced by teachers when considering that they have to include learners in everyday classrooms. For example:

*“About inclusive, at our school we are, I think, the place is not for those learners. Maybe if I can say we do not have resources to accommodate those learners.” (Article 27, p.693)*

**iii) Finding 3: Understanding inclusive education as a policy founded on human rights and promoting education for all**

The third finding is, as typically found in more recent comparative studies between South Africa and other countries (for example Article 28 and Article 77), that South African teachers identify inclusive education as a basic right of learners and that it has a role to play in terms of inclusion in society in general:

*“However, participants also believed that inclusion can benefit learners with and without special needs in terms of facilitating acceptance and understanding of each other.” (Article 111, p.185)*

*“In contrast, the vast majority of South African teachers clearly emphasised the concept of the rights of students, including those with disabilities, to participate in mainstream classrooms and to become full members of their school and wider communities.” (Article 28, p.313)*

**iv) Finding 4: Epistemic limitations for inclusive education – Learners do not learn like ‘normal’ learners, but are welcome if they ‘fit in’**

For Finding 4 there is reported opposition against inclusive education on grounds of mainstream teaching practice and curricula not being able to accommodate learners. According to these reports, inclusive education places learners experiencing barriers to learning in an environment with a knowledge base and knowledge construction practices that do not fit them:

*“As a result learners with disabilities were placed in separate classrooms and described in medical deficit terms: ‘... I feel that those children are expected to cope under normal circumstances but they are not normal ...’” (Article 23, p.528)*

*“...because of the educators’ unrealistic expectations that these learners must perform at the same cognitive or physical level as their more able peers, which results in prolonged absenteeism or dropping out.” (Article 34, p.9)*

However, should these learners fit in the system, they are welcomed and lauded:

*“This boy, S...., is very good. He even beats those that are normal.” (Article 81, p.361)*

**v) Finding 5: Epistemic limitations for inclusive education – learners experiencing barriers to learning should have special teaching practices for learning**

In this finding teachers stated that a specialised teaching practice is required when barriers to learning are considered, justifying separate curricula, assessment and teaching spaces. These findings are cases where different knowledge sets are recommended (lower levels in complexity, simplified assessments, or entirely different knowledge sets) and arguments that there is a lack of specialised training to provide teachers with the skills to adapt current curricula to fit the required practice:

*“Overall, the results suggested that teachers expected relatively little reading and mathematics progress for each of the learners, as evidenced by the low means in both academic areas.” (Article 16, p.54)*

*“Strategies used include working as one group as well as dividing the class into three smaller groups based on ability, i.e. homogeneous ability groups.” (Article 23, p.529)*

*“Those that are struggling, I give them work that is at their level.” (Article 61, p.6)*

**vi) Finding 6: Epistemic limitations for inclusive education – inclusive education weakens curriculum and should not be practiced in mainstream**

In this finding, the general argument supported by some teachers is that inclusive education requires teachers to dilute their teaching practice to an extent that it compromises learning and the knowledge and skills that learners are to accrue.

*“We need to take into consideration that there are twenty-four other children in the class [whose parents are] paying prime money to be here, to be extended [academically] and enriched, and anything that gets in the way of this process could be limiting” (Article 2, p. 11)*

*According to the teachers the learners ‘want us to spoon-feed the work’ and don’t care about their school work because they have no pride in it and because the parents do not instil academic pride in the children. (Article 18, p.655)*

For this finding, the confidence was measured as moderate. The explicit references to a weakened curriculum were a lower occurrence compared to other findings, but the finding aligns with others – separate skills and classrooms are argued for not only due to additional stress, but due to the assumption, as indicated in Finding 4 and 5, that knowledge is learned on a different level in traditional school settings.

**vii) Finding 7: Epistemic limitations for inclusion – inclusive education seen to exacerbate pre-existing issues to teaching and learning, not as resolution**

In this finding, teachers report various issues that would be exacerbated or would come to impede teaching practice should inclusive education is pursued. However, the issues reported pre-exist inclusive education practices. This includes issues such as additional workload due to diverse learners, training gaps for specialised lesson presentations to meet learner needs, overcrowded classrooms, and learners demanding individualised attention. Inclusive education is therefore disregarded without considering it as a potential teaching and learning alternative for resolution of such issues:

*“So I’m just thinking like if it’s gonna be more work . . . It’s gonna give us more work when there are learners who need special attention and there are special problems as well.” (Article 84, p. 12)*

*“Inclusive education can work if classes are not too big. So more educators need to be employed because if the classes are big as it is now, where some teachers are having 52, it’s terrible; there is not even space in the class for moving around.” (Article 57, p.783)*

*“At the same time, in South Africa, despite there being strong policy support and positive attitudes, the many contextual challenges (e.g. lack of pedagogical support, less than adequate training and large classes) make it very difficult for teachers to find their own solutions to issues of diversity*

*and, consequently, collaboration with the experts tends to take the form of referring students with special educational needs to services beyond the general-education classroom.” (Article 27, p.698)*

**viii) Finding 8: Epistemic success – adjusted curricula and teaching practice for inclusive education brought success**

On a more positive note, more recent articles that report on attempts for applying inclusive education practices in mainstream classrooms yielded positive feedback. Specific mention is made for amended teaching and assessment practices for learning:

*“...my attitude has changed positively towards learners in general. I am now diverse in terms of activities that I plan for my learners ... I have automatically developed my own tactics to cope with different learning problems ... I have managed to change learners with learning difficulties.” (Article 108, p.32)*

*“Teachers must be remediated.....to mix methods and not use the lecture method only..... there must be support structures in the schools.” (Article 69, p.212)*

*“We are now aware that we can develop inclusive practices by ourselves to suit our context; we cannot cling to practices we used in the past without question.” (Article 52, p. 132)*

In one article, teachers even voiced how separated teaching practices just serve to harm productive teaching and learning practices:

*“Pull out system hampers [education]!” (Article 113, p.117)*

**ix) Finding 9: Ethics of inclusive education – inclusive education seen as human rights responsibility**

From this finding, it seems clear that South African teachers view inclusive education as meeting the demand set by human rights and the South African constitution. They indicate a responsibility to be met by teachers and education institutions, although they may differ on what exactly this inclusion may entail (separated learning or education for all):

*“In both phases all participants were in general quick to define inclusive education according to the central principles of the Constitution as entrenched in the education legislation and White Paper 6.” (Article 23, p.23)*

*“In contrast, South African teachers link the concept of human rights in society in general and the specific right of all students to become full members of school communities to their definition of inclusion.” (Article 26, p.670)*



**x) Finding 10: Ethics and inclusive education – Inclusive education harms ethical responsibility to teach ‘normal’ learners**

In some cases, teachers use arguments of ethical responsibility in teaching to oppose inclusive education. The premise of the argument is that inclusive education detracts from the demands set for the education of ‘normal’ learners and therefore harms their progress and school’s ability to deliver quality education to these learners:

*“They are wasting our time, this is a hopeless situation and there is nothing we can do about it, we must just find a way of getting rid of them as quickly as possible...” (Article 43, p.183)*

*“We need to take into consideration that there are twenty-four other children in the class [whose parents are] paying prime money to be here, to be extended [academically] and enriched, and anything that gets in the way of this process could be limiting” (Article 2, p.9)*

**xi) Finding 11: Inclusive education is idealistic, not practical**

The final finding also has a moderate confidence assessment through the GRADE-CERQual process applied. Very low occurrences of outright statements describing inclusive education as idealistic were found. The finding, however, tracks with others in the epistemic and ethics categories (cf. Finding 4, 5, 6, 10). In the arguments found in the epistemic findings, it is only in the ‘ideal’ classroom and curriculum that learners experiencing barriers can be taught. In terms of ethics, it is a human rights responsibility to include learners but there is a status quo duty to employ practices for the development of the ‘average’ learner. It also follows from this line of reasoning that the status quo teaching practice is acceptable as the primary stance, seeing as the ethical responsibility for assisting learners with barriers to learning has already been met by the construction of specialised spaces for them.

*“Though teachers agreed with the principle of inclusive education and rights-based pedagogies, the existing frustration with regards to time could cause teachers to see inclusive education as impractical and even unrealistic.” (Article 57, p.783)*

#### **4.3.4.2 Quality criteria for generated synthesis reports**

As part of the GRADE-CERQual quality assessment, four categories are measured for confidence, ranging from low to high confidence (Ames et al., 2017; Odendaal et al., 2020). The four categories are (Ames et al., 2017; Odendaal et al., 2020): assessment of methodological limitations, assessment of adequacy (richness and quantity of data to support the finding), assessment of coherence (whether the data contradicts other findings or are ambiguous), and assessment of relevance (whether the data answers aspects of the research question).

In terms of the methodological limitations, the studies were already measured by means of the CASP protocol in the article screening phase, where articles with serious methodological concerns were already removed from the SLR. For assessment of adequacy, entries appearing lower than four times in different articles were further evaluated in connection with other findings and whether the articles were recent enough to account for new occurrences detected in contemporary research. No contradictions were captured and seriously ambiguous claims were first set aside in the fourth data extraction category before being assigned to a synthetic theme. If data extraction items could not be assigned outright, it was discarded as ambiguous or irrelevant – thereby promoting high coherence for the SLR throughout. The synthetic themes yielded were aligned with the general conceptual themes decided upon for the data extraction, their relevance is therefore directly in line with the ideological underpinnings and their role to the general understanding of inclusive education identified as the aspects of interest for the study.

#### 4.3.4 ENTREQ evaluation

For transparency in the reporting of the synthesis of the data yielded by the SLR, the ENTREQ statement and its 21 items, as compiled by Tong et al. (2012) (See Annexure E), were used as a tool for ensuring that the research protocol and its executed steps were clearly reported on throughout the conducting of the SLR. As a summary reporting tool, the entire SLR synthesis procedure can be reviewed as follows:

**Table 4-13: Amended from the ENTREQ statement table by Tong et al. (2012)**

No	Item	Report
1	Aim	Determine views held by in-service teachers pertaining to the ideological underpinnings of inclusive education.
2	Synthesis methodology	Critical Interpretive Synthesis (CIS), a method of interpretive synthesis applied in instances where the set of categories for critique are properly pre-specified. GRADE-CERQual tool used to capture findings and supporting articles.
3	Approach to searching	Comprehensive search strategies – to collect all available studies relevant to phenomenon
4	Inclusion criteria	1. Views held by teachers in 2. South Africa 3. on inclusive education. Only peer-reviewed articles from accredited journals and published

		after the implementation of EWP6 (post-2001)
5	Data sources	Electronic databases: EBSCOHost, Sabinet African Journals (formerly SAePublications), Google Scholar
6	Electronic search strategy	SPIDER search strategy with detailed Boolean search string.
7	Study screening methods	CASP appraisal and GRADE-CERQual assessment of confidence.
8	Study characteristics	Only studies done on South African teachers' views published after the inception of EWP6.
9	Study selection results	134 studies screened. Data collected on PRISMA report.
10	Rationale for appraisal	Only studies on teacher views in the South African context that addressed matters of inclusive education and inclusive education practice would provide comparable data to address research question in full.
11	Appraisal items	CASP used for appraisal.
12	Appraisal process	Appraisal conducted independently; results reviewed by independent researchers.
13	Appraisal results	General appraisal results fairly high (7+/11 CASP score). Articles reduced to 36.
14	Data extraction	Self-designed tool for data extraction. Extraction according to 4 categories related to ideological underpinnings under review.
15	Software	N/A
16	Number of reviewers	Only one researcher (primary researcher of this study).
17	Coding	Coding according to predetermined categories in line with Critical Interpretive Synthesis. (Understanding of IE, epistemology and IE, ethics and IE). Search for

		concepts through 1 <sup>st</sup> order and 2 <sup>nd</sup> order constructs commenting on IE.
18	Study comparison	Preliminary studies and results coincide. General results also align with results found within other meta-synthesis and international-comparison studies included within this study.
19	Derivation of themes	Inductive – themes are abstract, but dependent on explicit references associated with themes. For example – duties referenced apply to ethics as greater theme.
20	Quotations	Quotations primary source of evidence. See Annexure C1 – C8.
21	Synthesis outputs	Synthesis outputs reported on GRADE-CERQual tables ( <i>cf.</i> 4.3.4.1)

#### 4.3.5 Summary of SLR findings

The SLR yielded similar results as the preliminary studies presented on the views of teachers with regard to inclusive education (*cf.* 1.2-1.3 and 2.2.2-2.4). In terms of understandings of inclusive education, differing positions are held by teachers. To some inclusive education refers to merely inclusion of learners in the mainstream without adjustment of teaching practices overall (*cf.* 4.3.4.1.ii); for others, it is a human rights issue, but best met in specialised environments (*cf.* 4.3.4.i). In Finding 3 there was more prominent reference to inclusive education as an education practice for all learners (*cf.* 4.3.4.1.iii), but it is clear that diverse positions on inclusive education and what it means, specifically for general education, persist. Finding 4 to 7 indicated differing expectations of inclusive education in terms of teaching and learning, specifically in terms of what curricula are applicable and what teaching practices are relevant (*cf.* 4.3.4.1.iv - vii). From these three findings, it seems clear that an epistemic divide is supported by teachers through a comparison of traditionalist education and inclusive education.

In Finding 8 (*cf.* 4.3.4.1.viii), though, teachers applying inclusive education as a general teaching practice draw success in general and not only for overcoming barriers to learning. Finding 9 and 10 indicate two differing approaches to ethical arguments pertaining to inclusive education (*cf.* 4.3.4.1.ix-x). In Finding 9 (*cf.* 4.3.4.1.ix), ethical arguments in support of inclusive education are found supporting inclusive education on the grounds of human rights and the South African

constitution (although the consequent shape of inclusive education then still diverge as found in Finding 1 through to 3, *cf.* 4.3.4.1.i-iii). Finding 10 (*cf.* 4.3.4.1.x), though, are active arguments against inclusive education as a general education approach based on the premise that it diverges from mainstream, traditionalist education. Finding 11 reflects an alternatively phrased stance of what several of the opposing positions to inclusive education illustrate – that inclusive education is viewed as an ideal, but not practical in comparison to what is expected to occur in education (*cf.* 4.3.4.1.xi).

From the findings, the following categories could be identified for use in the quantitative phase:

- The role and extent of inclusive education according to policy;
- The role and extent of inclusive education in terms of epistemology, i.e. adjusted teaching practice and assessment;
- The ethical foundations of inclusive education and the responsibilities imbedded in inclusive education.

#### **4.4 Quantitative phase – survey questionnaire**

The research question that aptly guided the quantitative phase of the study is secondary question four (4) (*cf.* 1.4.2): What are the views of current pre-service teachers and their lecturers regarding inclusive education as an ideologically rooted pedagogy? Whilst the preceding qualitative phase accumulated data on in-service teachers, the quantitative phase is structured to accrue data on the other two identified parties involved in the education landscape with regard to the implementation of inclusive education.

##### **4.4.1 Strategy of inquiry**

With the data collected and synthesised through the SLR, the quantitative phase was designed to determine whether pre-service teachers and their lecturers hold similar or different ideological positions regarding inclusive education compared to those of in-service teachers. The SLR indicated that key points of diversion of view on the role of inclusive education lie in terms of how it is defined (education for all or specialised education); the epistemological implications (additional effort and specialised practice, or adjusted teaching practice in general); and the ethical foundations of inclusive education and traditionalist education. The quantitative phase instrument was designed in accordance to these findings, with the aim to measure similar or dissimilar trends with the sample groups' views on the epistemological and ethical implications for the practice of inclusive education. The method of quantitative research employed was that of

a non-experimental survey, for its use as a descriptive research technique collecting information on the attitudes, opinions, behaviours, experiences, or other characteristics of a sample group representative of a population (Mertler, 2016).

#### **4.4.2 Sampling and ethical clearance**

As confirmed in Chapter 3 (*cf.* 3.2.3.3), the sampling method relevant for this phase of the study was non-probability convenience sampling. The purpose of this sample was to gain credible data from pre-service teachers and their lecturers. The fourth-year sample group is representative of pre-service teachers who gained training in education and inclusive education in the South African context.

For the sample group of lecturers, all the BEd lecturers of the same site were approached for voluntary participation in the study via a group email chain shared by the Deputy Dean of the faculty at the relevant campus (See Annexure F). The email with the invitation to participate and the link to the questionnaire was sent by an independent researcher.

#### **4.4.3 Instrument design and data collection**

The instrument used for data collection from both samples was a self-constructed questionnaire, of which the items were informed by the SLR findings (*cf.* 4.4.5). The questionnaire was designed with 4-point Likert scale items, with the questions sub-divided into three themes of interest to this study and derived from the SLR findings: Inclusive education by definition, knowledge practice of inclusive education, and ethics of inclusive education. The SLR indicated that key points of interest in relation to current in-service teachers would be how pre-service and lecturers view the role of inclusive education lies in terms of how it is defined (education for all or specialised education); the epistemological implications (additional effort and specialised practice, or adjusted teaching practice in general); and the ethical foundations of inclusive education and traditionalist education. Items A1 to A3 were constructed for capturing biographical information, B1 to B8 for the understanding of policy and inclusive education in general, C1 to C6 for measuring views on the pedagogical practice of inclusive education, and D1 to D6 for measuring views on the ethical considerations related inclusive education as teaching practice (See Annexure L and M). Barring a difference in biographical questions to the particular sample groups, the questionnaires provided to the lecturers and pre-service educators were identical.

The designed questionnaire was given to a qualified statistician in service of the Optentia research unit for review and advice on improvement and viable statistical analysis techniques that could be performed with the questionnaire. After obtaining final approval from the statistician, the independent researcher conducted a pilot study of the questionnaire with four respondents (three

pre-service teachers and one part-time lecturer) that shared similar characteristics to the sampled respondents but did not form part of the main research study. It was affirmed that the time required for the completion of the questionnaire would not exceed thirty minutes. A review of the pilot study results by the researcher and the statistician also presented no detectable flaws that required amendment of the research instrument.

The independent researcher posted an advertisement of the study and then an invitation to the study with the link (See Annexure N), a week apart, to the pre-service teachers on the online module page for the students' work-integrated learning module. The advertisement, the final invitation and the electronic questionnaire explained the nature and the scope of the study, as well as the informed consent and voluntary participation procedure. Informed consent was collected via the electronic questionnaire as a confirmation selection on an informed consent page preceding the questionnaire items.

The independent researcher approached the lecturers of the BEd faculty at the relevant institution via a group email, using the combined group list provided by the Deputy Dean of the faculty at the relevant campus. The scope of the study was also explained by means of advertisement and invitation mail (See Annexure O), sent a week apart, via the internal email service used by the faculty. Informed consent and voluntary participation were reiterated by means of the advertisement, final invitation as well as within the questionnaire.

#### **4.4.4 Data analysis**

The collected data from the survey was statistically analysed and illustrated with the help of the qualified statistician in service of the Optentia research unit. After the data collected from the questionnaires were analysed by means of a confirmatory factor analysis, the statistician reported that the factors did not neatly divide according to the sections highlighted in the questionnaire. The data did not fit to the overall sections; i.e. Section B (Variables 1 to 8) for inclusive education definition, Section C (Variables 9 to 14) for epistemology and inclusive education, and Section D (Variables 15 to 20) for ethics and inclusive education. It was suggested that an exploratory factor analysis be done instead – where underlying variables that could be drawn from the data are highlighted (Byrne, 2012; Knoke, 2005; Wang & Wang, 2020). From the exploratory factor analysis, a new factor structure was suggested (See Annexure P). The issue with data not neatly fitting and an amended factor structure being required made sense considering how the epistemic and ethical factors with regard to inclusive education as policy and pedagogical practice are interwoven. Especially with items B2 and B5 of the survey as examples (See Annexure L or M), it can be seen how policy requirements and epistemological or ethical positions overlap. Although

the intention was to review the understanding of inclusive education as policy in terms of epistemic or ethical requirements, the focus and measure actually occurred on the latter.

In order to form a depiction and comparison of student and lecturer viewpoints on inclusive education, SPSS 27 was used as the preferred tool for descriptive and inferential statistics for social science hypotheses testing (Field, 2018; IBM Corporation, 2021).

As part of the inferential analysis steps, means between the groups were compared. Independent T-tests were performed to test for significant deviations between the two groups (Field, 2018). On all items, the lecturers and students selected the same measures with no significant deviation except for items B7 and D5. To determine the effect sizes of the deviations, Cohen's  $d$  was used:  $d < .30$  = small effect;  $d > .30$  = medium effect;  $d > .50$  = large effect (Field, 2018). The deviation and effect size on the items were as follows:

**Table 4-14: Questionnaire data deviation summary**

Item	Mean deviation	Effect size
B7 (Variable 7): Inclusive Education, as required by Education White Paper 6 – <i>Special Needs Education: Building an Inclusive Education and Training System</i> , is aimed at addressing the needs of:	On average, lecturers more consistently saw IE as aimed at addressing the needs of all learners ( $M = 1.25$ , $SE = 0.11$ ), whereas students selected on average closer to the option of learners who experience barriers to learning in all classrooms ( $M = 1.82$ , $SE = 0.13$ ). This difference, 0.57, BCa 95% CI [ 0.24, 0.90], was significant $t(54.26) = 3.28$ , $p = 0.00$ ; representing a large effect, $d = 0.67$ .	Large
D5 (Variable 19): The responsibility of a teacher with regard to applying Inclusive Education as a pedagogical approach depends on the type of school they are employed at (for	Whilst lecturers disagreed more ( $M = 2.13$ , $SE = 0.20$ ), students also disagreed, but to a much lesser extent ( $M =$	Large



example a mainstream school, a full-service school or a special school)	2.78; $SE = 0.12$ ). The difference of 0.66 (BCa95% CI [0.18, 1.12]) was significant $t(64) = 2.80$ . $p = 0.01$ , showing a very large effect, $d = 0.81$ .	
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All tables summarising the descriptive statistics for the survey are attached as Annexure Q1 to 3, but the statistical means for each item can be summarised as follows:

**Table 4-15: Items and means for collected data from students and lecturers**

Variable	M	SD
Inclusive Education (IE) (scale: 1-4: Strongly disagree to Strongly agree)		
1. IE should be a priority to be achieved by all schools	3,61	0,70
2. IE is of concern only for special needs schools	1,79	0,75
3. IE is reserved for specialised settings/classrooms	2,29	0,89
4. IE applies to all subjects	3,52	0,65
5. IE applies to specific curricula designed for specialised settings	2,36	0,76
6. IE applies to all teachers and all curricula	3,58	0,53
7. IE, as required by Education White Paper 6, is aimed at addressing the needs of:	1,68	0,77
1) all learners, 2) learners who experience barriers to learning in all classrooms 3) or in specialised settings, or 4) learners with special needs in special schools		
8. In your opinion, should IE be aimed at addressing the learning needs of:	1,23	0,24
1) all learners, 2) learners who experience barriers to learning in all classrooms 3) or in specialised settings, or 4) learners with special needs in special schools		
9. In the everyday classroom, IE applies to:	1,26	0,50
1) all subject fields, 2) specific subject fields, 3) specific content sections within relevant subject fields, or 4) no subject fields outside of specialised settings		
10. The following classrooms should apply IE as practice in the everyday classroom:	1,20	0,38
1) all classrooms, 2) all classrooms except for subjects dealing with "hard facts", 3) only the subjects that deal with personal life skills, or 4) only to specialised settings		
11. Pedagogical practices in all subject fields should be adapted to address individual learner needs	3,45	0,65
12. Pedagogical practices in all subject fields should be adapted to address special learner needs	3,29	0,55
13. The content knowledge of any subject field can be unpacked within an IE framework	3,39	0,40

14.	The type of knowledge contained in a subject field determines whether IE applies as practice	2,55	0,71
	It is the responsibility of the teacher to:		
15.	adapt their pedagogical practices to address individual learner needs	3,33	0,50
16.	adapt their teaching practices to ensure inclusivity	3,52	0,44
17.	adapt their teaching practices to address the needs of all learners	3,44	0,50
18.	use IE as a framework for their teaching practices	3,44	0,40
	The responsibility of a teacher with regard to applying IE:		
19.	as a pedagogical approach depends on the type of school they are employed at	2,62	0,73
20.	is dependent on the type of subject content knowledge being taught	2,50	0,78

The standard deviation for the items, the measure of the spread of data in relation to the mean (Allen, 2017), were low. Therefore, all responses were closely distributed about the mean for both the pre-service and lecturer groups.

From Variable 1 through 6 and Variable 8, items focussing on the understanding of inclusive education as policy in South Africa, we see that the respondents are primarily aligned with the broader expectations set with EWP6. As discussed in Chapter 1.3 and Chapter 2, this occurrence was expected and can be seen in other studies focussing on teacher understanding and perceptions of EWP6 and the implementation of inclusive education (*cf.* 1.3 and 2.2.2). The respondents understand that, according to policy, inclusive education is applicable to all schools and all subject fields. However, as indicated by Variable 7, there is a flawed expectation that the policy is aimed at addressing only learners who experience barriers to learning. As indicated in Table 4-14, students especially indicated inclusive education as a pursuit for learners experiencing barriers to learning rather than a focus on all learners and the education system as a whole. Although this could be the arguable consequence of EWP6's focus on inclusion of those learners who, contemporarily and historically, experience barriers to learning – it does express a conflict in perception as to what extent inclusive education should apply to the broader education system and teaching practices.

From Variable 9 to 13, items focussing on the teaching practices of inclusive education and epistemological role thereof, we see similar trends in alignment with policy prerequisites. Admission is made that inclusive education practice is not limited to types of classrooms and that pedagogical practices should be adapted to meet learner needs. However, when focussing on specific subject-related knowledge with Variable 14, a sharp turn occurs with the majority of respondents indicating that they agree that types of subject knowledge will determine the adequacy of inclusive education as teaching practice. As with Finding number 5 of the SLR (*cf.* 4.3.4), there is an indication that a division of types of knowledge is supported when it comes to

learners experiencing barriers to learning – with some knowledge structures and complexities not being relevant to some learners. Interestingly enough, this is a contradictory position with Item 13, where the majority of respondents indicated that all subject knowledge can be unpacked in an inclusive education framework. However, it does potentially illustrate that respondents make a distinction between what could be done (Item 13 indicating potentiality with ‘can be done’) versus what should be done (Item 14 explicitly asking the relevance of inclusive education practice in relation to specific subject fields and types of knowledge).

From Variable 14 to 18, items focussing on ethical matters of responsibility toward inclusion and adaptation of teaching practices for inclusion, we see again respondents strongly agreeing with EWP6 in viewing inclusive education and inclusive education practices as being a responsibility to be met by teachers and the education sector.

Greater dissonance is once again seen in the final two variables. For Variable 19, measuring whether teacher responsibility for applying inclusive education is dependent on the school they are employed at, the majority of respondents answered in agreement with the statement. The greater deviance is with preservice teachers to a greater effect agreeing that the type of school would determine teacher responsibility, compared to lecturers that more readily disagreed (See Table 4-14). The reasons for this could be that students have been involved more directly with schools and contemporary classrooms more recently compared to their lecturers. They may be more acutely aware of the current demands placed on teachers and their classrooms and may object to acknowledging the responsibility due to this more contemporary first-hand experience. As a means of avoiding generalised responsibility, they then agree that inclusive education as outright teacher responsibility is reserved for specialised settings. For the final variable, we see a split in position on the stance of responsibility with regard to subject knowledge type and the application of inclusive education practices. This once again indicates that preservice teachers and lecturers also hold some reservations when it comes to different subject knowledge types, similar to their in-service teacher associates (*cf.* 4.3.3 and 4.3.4).

#### **4.4.5 Summary of quantitative phase findings**

As with the literature review (*cf.* 2.2.2-2.4) and SLR (*cf.* 4.3.3 and 4.3.4), the quantitative study reported the same general understanding of inclusive education policy held by the respondents and similar preferred limitations for the practice of inclusive education. Similar trends in differing definitions and application of inclusive education according to policy is seen with Variable 7 and 8. For Variable 7 the majority reported that EWP6 is orientated towards learners experiencing barriers to learning; although when prompted to raise their own opinion in Variable 8, the majority indicated inclusive education as a preferred teaching practice for all learners. Although the

majority, therefore, indicate that the policy's concern is only for learners experiencing barriers, it is reported that inclusive education should address the learning concerns of all learners. Other than this occurrence, and indicated limitations to be discussed in the next paragraph, the respondents generally report inclusive education as education policy and practice applicable to all, that requires adjustment of teaching practices to address learner learning needs, of which the policy and practice is a responsibility that teachers have to meet.

Pre-service teachers and their lecturers, in concurrence with stipulated premises of EWP6, report policy and practice requirements as a teacher responsibility. However, reluctance to apply inclusive education as a general teaching practice is seen with the results of Variables 14, 19 and 20 especially. From Variable 14 and 20, which addresses the role of inclusive education for specific subject knowledge types and the responsibility of the teacher in the application thereof, at least half of the respondents indicated that the subject knowledge type may influence whether inclusive education is required or applicable. As for Variable 19 (which addresses the responsibility of teachers to employ inclusive education in general schools or specialised setting), the majority of pre-service teacher respondents indicated that the responsibility for its implementation does rest upon the type of education environment the teacher finds themselves in (*cf.* 4.4.4).

#### **4.5 Mixed methods study findings**

With the mixed methods study, triangulation was achieved for the occurrence of the researched phenomena between the three data sets – the general literature review that formulated the historical and contemporary context (*cf.* 2.2 - 2.4); the SLR and its focus on in-service teacher perceptions (*cf.* 4.3.4 - 4.3.5); and the quantitative survey results based on the perceptions of lecturers and pre-service teachers (*cf.* 4.4.4. – 4.4.5). In all three sets, the occurrence of differing views on the role and extent of the application of inclusive education is seen and reported along epistemological and ethical grounds. Whilst there is agreement as to the general requirement of inclusive education to address the learning needs of all learners, especially when participants and respondents are addressing inclusive education policy, there is division and detraction in terms of appropriate environments for inclusive education and the relevance of inclusive education practice based on subject fields.

In the SLR (*cf.* 4.3), record is made of expressions of ethical and epistemological contestations with regard to the applicability of inclusive education. Contesting positions counter arguing the application of inclusive education is seen on the premise of epistemological practice and ability through statements of unique curriculums required for learners experiencing barriers, limitations in terms of subject matter and levels, or learners experiencing barriers required to 'fit in' the norm

should they be welcome in the everyday classroom. In terms of ethical grounds, counter positions are seen with claims of inclusive education either working against the success of general teaching practice for the majority of learners, or that it would be a more ethical position to separate curriculum and school for learners experiencing barriers to learning. When applied in the quantitative phase of the study as key questions, the same effect was found – a deviation of the application of inclusive education dependent on the subject field content, or responsibility for the application of inclusive education as teaching practice determined by the type of school that the educator is employed at. As with the literature review (*cf.* 2.2.2 – 2.4), both the SLR and the survey indicated that educators (in-service, pre-service and the lecturers training educators) have a firm understanding of the ethical bases and what the extent of inclusive education application should be in terms of policy. However, both also indicated that a great margin of these educators contests inclusive education as a general pedagogical practice for reasons related to subject content knowledge and responsibility towards teaching practices related to systemic needs – i.e. traditionalist teaching practices in accordance to the type of school and by implication the type of learner.

#### **4.6 Conclusion**

In this chapter, the steps for the performed exploratory mixed methods study were reported. In the qualitative phase, 11 important findings were formulated. These findings indicated that a firm understanding of the policy for inclusive education in South Africa is apparent, but that contestation to the application of inclusive education is still found on grounds of ethical and epistemological concerns. The epistemological and ethical motivations are related to types of subject content and responsibilities towards learners in the everyday classroom. In the subsequent quantitative phase, the same findings with regard to the stipulations of policy are found and the same effect in terms of counter positions to inclusive education in general teaching practice stood out. The mixed methods study, therefore, highlighted that although the ethical grounds and the extent of the application of inclusive education are generally understood by educators, there are still detractors that do not view inclusive education as an appropriate general teaching application and support that opposition in terms of specific arguments resting on epistemological and ethical positions. In the next chapter, these comparative findings are critically interpreted in the context of the ideological underpinnings of pedagogical frameworks. In light of this critical interpretation a concluding argument follows that addresses the primary research question and how viewing inclusive education as an ideology might inform on its, and other pedagogical frameworks' application.

## **CHAPTER 5 - RESEARCH FINDINGS**

### **5.1 Overview of chapter**

In this chapter, a critical analysis is done of the yielded data from the mixed methods study. The critical analysis involves evaluating the data in the context of the ideological factors influencing pedagogical practices as identified in Chapter 2. The overall study aims to critically analyse the pedagogical applicability of inclusive education as a teaching policy and practice when it is viewed as an ideology. To this extent, a comparison will be drawn between the purported epistemological and ethical factors that constitute the foundational ideological roots of inclusive education and traditionalist education, and how the data obtained from the mixed methods study relates to these ideological-pedagogical stances.

### **5.2 Pedagogy as ideology**

As discussed in Chapter 2, pedagogical frameworks such as inclusive education function as forms of philosophies of education that imbeds teaching practice with specific ethical and epistemological convictions (*cf.* 2.3.1). However, when it comes to education, these pedagogical frameworks are not simply conceptual or theoretical analyses or thought experiments. Pedagogical frameworks employ epistemological and ethical convictions with the explicit intent of reshaping education and its systems, both abstract and material, thereby demonstrating characteristics that qualify it as ideologies (Brantlinger, 1997, 2004; Byrne, 2005). The merit of a pedagogical framework should, therefore, be measured in terms of its ideological foundations, referred to as ideological roots (Allan, 2013; Collins & Broderick, 2013), as it is these ideological foundations that impress on us what education should achieve (Brantlinger, 1997).

Two key ideological roots that are therefore identified as significant factors in determining differing pedagogical frameworks are their epistemological and ethical convictions. Although both epistemology and ethics are dense concepts that have their own philosophical works that question their natures, in terms of ideological roots in the context of pedagogical frameworks in this study they will refer to specific epistemological and ethical convictions underpinning teaching practice. In terms of epistemology, it will refer to how knowledge constructs and the construction process, specifically the teaching practices that are preferred for knowledge construction, are viewed and evaluated. As for ethics, the focus will be on the responsibilities ascribed to educators with regard to their teaching of learners and adherence to specific teaching practices.

### 5.3 Ideological roots of inclusive education and traditionalist education

By drawing a distinction between inclusive education and traditionalist education, Brantlinger highlights the divergence of their epistemological and ethical implications for teaching practice (1997). Traditionalist education is described as the established teaching practice, which although it is “anecdotally” reported as being left unchanged for over a hundred years, that still present historical consistencies that shape an established and resistant pedagogy (*cf.* 2.3)(Tocci et al., 2019). It is a view for education established from the 19<sup>th</sup> century onwards, where teaching as a system requiring a linear model of determined progression, that is built upon principles of competition and that is entrenched in a standardised curriculum that is formulated on the basis of being applicable to the average student populace (Brantlinger, 1997, 2004). This, of course, immediately separates education practice into differing types. One, the type of practice applicable to a general populace; and second, a specialised teaching practice for those that are not considered part of the general student populace – such as those defined as ‘disabled’ (Allan, 2013; Brantlinger, 1997; Collins & Broderick, 2013). The onus here is not that the system adapts to the learning needs of the populace of students, but at best that a projected average is established that has to be met by the members of the student populace in order to remain included in the everyday school environment (*cf.* 2.3). Those that do not meet the projected minimum criteria are defined as different and guided to a specialised education setting.

In comparison, inclusive education’s stance is that learners are not to be viewed as entities that have to fit the established generalised norm envisioned by the established education system, but that education systems should be structured in a way that includes learners of diverse learning capabilities and be focussed on overcoming barriers to learning (Ainscow, 2007; Brantlinger, 1997; Swart & Pettipher, 2019). By establishing diverse capabilities as the starting point for teaching practices, instead of the standard external measurement that needs to be reached by participants, many argue that all learners would gain due to the consequently enhanced teaching practices that are aimed at overcoming barriers and the consequent diverse social environment that would foster interaction and observation between parties whom would not otherwise interact (Ainscow, 2007; Allan, 2013; Booth & Ainscow, 2002; Brantlinger, 2004; Helldin et al., 2011; Herman et al., 2014; Swart & Pettipher, 2019). The argument is that diverse teaching practices are employed to meet the needs of a learning audience that is divergent, therefore promoting more stimulating learning opportunities and environments for learning – not a standardised and rote teaching and learning practice, but a thoughtful and purposefully constructed one (Booth & Ainscow, 2002; Brantlinger, 1997).

Translated to their ideological roots, for traditionalist education we then see an epistemological foundation of knowledge constructs and teaching practices aimed at a generalised end – a

standard set of replicable constructs determined and measured by a pre-set learner capability scale. The ethical foundation is a closed loop of declaring that the responsibility of meeting the learning needs of students is achieved when the standardised set of practices that are fundamentally representative and supportive of the established system of education are performed (Brantlinger, 1997). On the other hand, for inclusive education the epistemological foundation is one of diverse practices that take into consideration learning needs, so as to enable meaningful educational events for development on the individual level (*cf.* 2.3.1). The ethical foundation for inclusive education is built upon individual human rights - not in the neo-liberal socio-economic sense of justified competitive and marketable access to elite individualised learning opportunities, but a general education system representative of the society learners find themselves in and that promotes the development of their ability to contribute to their society individually and collectively (Slee, 2014; Slee & Allan, 2001).

Based on the findings in Chapter 2 (*cf.* 2.3), differences according to ideological roots can be summarised as follows:

**Table 5-1: Summary of ideological roots of traditionalist and inclusive education**

Traditionalist Education	Inclusive Education
Epistemological roots	
<ul style="list-style-type: none"> <li>• Access to knowledge is capability based</li> <li>• Competition has primacy in determining knowledgeable and capable learners</li> <li>• Knowledge construction practices are orientated towards a perceived 'general, abled learner'</li> <li>• Linear progression for abstract/perceived standard</li> <li>• Knowledge type and practice restricted to type of learner and vice versa</li> </ul>	<ul style="list-style-type: none"> <li>• Access to knowledge and knowledge practices among diverse group of peers – not based on perceived ability</li> <li>• Diverse practices for overcoming barriers to learning takes primacy</li> <li>• Diverse capabilities, barriers, and strengths are accepted and practices aim to enable knowledge construction on the individual level</li> <li>• Individual progression for societal contribution</li> <li>• Limitations with regard to knowledge type not pre-set</li> </ul>
Ethical roots	
<ul style="list-style-type: none"> <li>• Individual human right to education, based on access to aggregate/standardised practices</li> </ul>	<ul style="list-style-type: none"> <li>• Individual human right to education, based on practices to overcome individual barriers to learning</li> </ul>



<ul style="list-style-type: none"> <li>• Responsibility to place learner in the right type of school/setting</li> <li>• Responsibility to scaffold according to ability</li> <li>• Responsibility to diagnose</li> <li>• Establish system of training, evaluating, and progression/retention/special placement</li> </ul>	<ul style="list-style-type: none"> <li>• Responsibility to focus on overcoming barriers to learning</li> <li>• Responsibility to create meaningful learning opportunities including learners of diverse skill levels</li> <li>• Responsibility to include</li> <li>• Establish stimulating learning contexts</li> </ul>
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In order to answer the general research question on how viewing inclusive education as an ideology could contribute to its applicability, it was argued that research into the ways that inclusive education’s application is reportedly endorsed or contested could be analysed according to those positions’ ideological roots (*cf.* 1.4-1.5). This process would provide insight into the extent that inclusive education is generally correctly understood, arguably failing due to its own ideological foundations, or how inclusive education is shown to be failing due to factors that are held as the ‘reality’ for education but that are ideological factors themselves.

#### **5.4 Mixed methods results and analysis – ideological roots endorsed by practitioners in education**

To explore the ideological underpinnings ascribed to and against inclusive education, it was determined that all three parties involved in the eventual application of inclusive education in South African schools should be included as part of the study – in-service teachers, pre-service teachers and lecturers of pre-service teachers that are to train teachers on inclusive education policy and practice. From a preliminary study, it was abundantly clear that extensive research exists on in-service teachers’ perspectives on inclusive education practice and implementation in the South African context (*cf.* 1.2). It was therefore suggested that a qualitative SLR be performed to collect articles that included expressions referring to inclusive education practice along the grounds of the definitions provided for inclusive education, references to its knowledge practices or implications thereof, and references to its ethical implications (*cf.* 1.8, 2.4, 3.2 and 4.3). The data yielded from the SLR would then be adapted to construct a questionnaire to determine whether pre-service teachers and their lecturers may hold similar or different views (*cf.* 1.8, 2.4, 3.2 and 4.4).

#### **5.4.1 SLR – in-service teachers and ideological roots of pedagogy**

For the SLR, eleven findings were synthesised from the data obtained from the 34 articles that conformed to the study's search and data extraction requirements (*cf.* 4.3.5).

Findings 1 through to 3 (*cf.* 4.3.4.1.i-iii) specifically reports on the overall purpose and requirements of inclusive education in terms of defining its key descriptor - inclusion. From the three findings we see a traditionalist education stance, an inclusive education stance and a mixed version of the two. From Finding 1 it is found that a section of the in-service teacher populace interprets inclusive education as just a refined policy to establish traditionalist practices (*cf.* 4.3.4.1.i). Inclusion is defined as steps taken to identify barriers to learning and then place students in the designated spaces for students experiencing specific barriers to learning. In terms of ethics, the responsibility is to identify exactly the type of barrier that is at play and direct the student to the environment that caters for that pool of learners. In terms of epistemology, the embedded assumption is that there are teaching and learning practices applicable to specific environments and for specific groups.

Finding 2 is a mid-way between the two forms of identified interpretations for inclusion (*cf.* 4.3.4.1.ii). It is a position that acknowledges the ethical responsibility of including learners in the education environment without discrimination, but that it means that learners experiencing barriers are included physically in the everyday classroom and that they are required to meet the expectations set by traditionalist education practices. Learners experiencing barriers are included in the everyday classroom, but teaching practices are not adapted to address barriers. Adjustment is not made for learners who experience barriers to learning, nor for their peers who could also benefit from amended and diverse learning experiences.

Finding 3 represents the policy intended view of EWP6 (*cf.* 4.3.4.1.iii). This finding shows that a great many South African educators see inclusive education as a right and one that requires teachers to acknowledge their responsibility in developing a school environment representative of society at large. It is seen as a responsibility to be met by educators in South Africa, but also a strategy that would lead to the benefit of all learners and meet the general societal stance of non-discrimination. The embedded acknowledgement, however, is that it would require planning and adjustment of teaching practices in order for inclusion to be successful:

“We can include learners in both planning and teaching” (Article 67, p.221).

Findings 4 through to 8 are findings that are epistemological judgments made regarding inclusive education (*cf.* 4.3.4.1.iv-viii). Findings 4 and 5 reflect the traditionalist medical-deficit stance when it comes to learners experiencing barriers to learning (*cf.* 4.3.4.1.iv-v). In Finding 4 (*cf.* 4.3.4.1.iv),

the traditionalist education's envisioned average student and accompanying knowledge 'mean' is expressed. It depicts knowledge and knowledge construction as an idealised standard that should be met or fall short of. As a consequence, all learners are 'welcome', as long as they fit the established knowledge practices. Finding 5 indicates the same capabilist stance with regard to access to knowledge practices (*cf.* 4.3.4.1.v). In Finding 5, however, it is argued that it is ethically required that learners experiencing barriers to learning be separated. They need to be assisted towards specialised environments, as it is there that the required teaching practices would be endorsed that could overcome barriers to learning. A repeating factor seen for justifying separate practices are arguments that certain subject fields are not open to adjusted teaching practices, leading to it not being possible to make it available to or include learners experiencing barriers to learning in those settings.

Finding 6 and 7 are also responses informed by conceptualised standard teaching practices, however here it is seen that inclusive education is a threat to the knowledge construction processes (*cf.* 4.3.4.1.vi-vii). In Finding 6, inclusive education is accused of going against what education practices should attempt to achieve. From the oppositional view it can be seen that their ideal pedagogy is evidently framed in the context of the competition-orientated, output measured, linear-levelled expression of improved capability and knowledge construction as is ascribed to traditionalist education. Inclusive education is, in this context, virus-like. It is accused of crippling education, watering down knowledge construction and supplanting pedagogy with presence. Finding 7 is a milder reaction, but also sees its justification in the context of traditionalist education practices (*cf.* 4.3.4.1.vii). In Finding 7, inclusive education is seen as an additional strain. It is not viewed as a general pedagogy, but rather an added demand and practice relevant to only those learners who explicitly express experiencing barriers to learning. The view is therefore not a shift away from traditionalist education knowledge construction practices, but a tack-on adjusted teaching practice for those experiencing barriers added to the already established norm.

In contrast, Finding 8 is as a result of attempting inclusive education practices in earnest to find that its effects could assist curriculum teaching and student development and support in general (*cf.* 4.3.4.1.viii). In Findings 4 through to 7 there are repeated references to the range of limitations, stressors and mountainous workloads as added justification to disregard inclusive education as pedagogical approach and for entrenching divisions and status quo practices (*cf.* 4.3.4.1.iv-vii). As one researcher summarised their findings:

“The participants ignored the distinctions between broad education challenges, such as large classes, and the challenges of inclusive education. This blurred distinction has consequences... They did not recognize that inclusive education can bring relief in terms

of time pressure, and that individual assistance is not a key aspect of inclusive education.”  
(Article 19, p.354).

What educators who are contesting inclusive education are therefore not considering is the fact that inclusive education may be the very resolution to the existing issues they experience in schools. Finding 8 demonstrates that in contexts where adapted teaching practices have been pursued, success was achieved and teachers felt empowered by being able to have greater effect in assisting learners to overcome barriers and enhancing learning in general (*cf.* 4.3.4.1.viii).

Findings 9 and 10 are those explicit expressions of duty and responsibility with regard to the implementation of inclusive education (*cf.* 4.3.4.1.xi-x). Finding 9 is a prevalent response when South African educators are questioned about the importance and purpose of inclusive education, especially in comparison to other countries (Engelbrecht & Savolainen, 2018; Nel et al., 2014). South African educators identify inclusive education as a human rights matter, that it is a policy to overcome discrimination. Inclusive education is, therefore, the responsibility of the entire education system, teachers included, to achieve. However, as seen in the previous findings, this is qualified again by what is understood to be ‘effective’ inclusive education in relation to existing teaching practices. Finding 10 exposes the competing duty with regard to inclusive education, which also serves to support medical-deficit models and inclusive education as best practiced separately from general education practice (*cf.* 4.3.4.1.x). Finding 10 is the argument that teachers have a duty towards their ‘general’ learners, and that inclusive education hampers their ability to perform this duty. Implied in this argument is the range of traditionalist epistemological and ethical convictions – that standard education is best structured and applied towards the ‘average’ learner, that learners need to fit teaching practices and not vice versa, that education is a competitive environment and that practices that do not endorse this end can only serve to hamper education, and that the responsibility is to place the learner in the ‘correct’ environment for their required practices. Once again, the argument is that the focus should be on learners meeting the ends of the existing system and not the adaptation of education according to needs and development.

The final finding places in words exactly what the contesting positions to inclusive education imply – that inclusive education is an idealistic notion that is not practically executable. This highlights the ideological contestation between drawing the polar opposites of traditionalist and inclusive education – one or the other will hold to be true for effective and demonstratively beneficial education. From the established viewpoint of traditionalist education, inclusive education is an ideology of ideals and not a practical pedagogy.

#### **5.4.2 Self-constructed questionnaire – Pre-service teachers and their lecturers**

From the information gained from the literature review and the specific findings of the SLR, a Likert scale questionnaire was constructed to see if pre-service teachers and those that are lecturing them on pedagogical practices hold similar views as that found among in-service teachers. Key diverging points of views on inclusive education relevance and practice that were found in the SLR that were adapted as questions are:

- The scope of inclusion according to inclusive education as policy, specifically EWP6
- The responsibility of teachers to apply the policy and adjust teaching practices
- The scope of adapted teaching practices as a consequence of inclusive education
- The scope of the duty for teachers to include learners

The questionnaire was constructed, therefore, to probe if pre-service teachers and lecturers apply the same divergences as in-service teachers when it comes to responsibilities in applying inclusive education in the education system in general and views on its limitations in terms of teaching practices and knowledge sets.

The respondents generally reported the same stance on inclusive education as was found in the SLR when South African educators describe EWP6 as policy. Respondents answered questions related to policy that supported the view that inclusive education is an education policy and practice applicable to all, that requires adjustment of teaching practices to address learner learning needs, of which the policy and practice is a responsibility that teachers have to meet. Both pre-service teachers and their lecturers, in concurrence with stipulated premises of EWP6, report policy and practice requirements as a teacher responsibility.

However, limitations to responsibilities of inclusive education practices are apparent especially when probed on specific subject types and knowledge sets and when questions are formulated more in terms of personal judgement rather than policy prerequisites. A reluctance to apply inclusive education as a general teaching practice was seen in the results of three variables (variables 14, 19 and 20). Two of the three variables specifically probed epistemological factors. The first specifically asked whether knowledge sets or subject types could be a limiting factor applying inclusive education practices, and the second if there is a limitation in the duties of an educator to apply inclusive education based on specific knowledge sets or subjects. As with the SLR, a strong divergence can be seen here. At least half of the respondents indicated that the subject knowledge type may influence whether inclusive education is required or applicable, or if the educator would have any responsibility towards applying inclusive education when specific subjects or knowledge sets are involved. The third variable of note addressed the responsibility

of teachers to employ inclusive education in general schools or specialised setting. Here also a large number of respondents indicated that inclusive education practices are dependent on the types of schools. Although there was a lower effect for lecturers indicating that they viewed inclusive education practice dependent on type of school, the majority of pre-service teacher respondents indicated that the responsibility for its implementation does rest upon the type of education environment the teacher finds themselves in.

In these results, we see the same slip towards traditionalist education stances as is seen occurring in the case of in-service teachers. In the case of the three variables mentioned, the respondents had to indicate not what policy required, but what they viewed as relevant limitations and responsibilities. In terms of epistemology, there is divergence based on views of subject types and requirements disqualifying inclusive education and that there is a responsibility to leave specific subjects and their practices as is. Limitations are placed with regard to the relevance of inclusive education as pedagogical practice based on the idea that it would detract from the standard of the subject and its practices. In a similar vein, a great many respondents still see school type as a factor for the application of inclusive education. When it comes to determining inclusive education practice as a responsibility to be performed, it is viewed by many that the responsibility should be assigned in accordance to the type of school – the division based on the service and resource structure division of mainstream, full-service or special schools. For many then the duty still remains to enact established teaching practices in accordance to established environments and to place learners according to diagnosed ability.

### **5.4.3 Answering the secondary questions**

As a route to answering the primary research question, it was suggested that the following secondary research questions be answered so as to obtain data on the views of the epistemological and ethical implications of inclusive education within the current education system of South Africa:

- (1) How are those practicing and contesting inclusive education in the South African education system presenting and describing the ideological underpinnings of inclusive education?
- (2) What are the views of current pre-service teachers and their lecturers regarding inclusive education as an ideologically rooted pedagogy?

As seen in the SLR (*cf.* 4.3.4), inclusive education is still contested or interpreted from the context of a competing pedagogical stance - which can here also be described as traditionalist education as it reflects the same convictions identified by Brantlinger in her comparison of inclusive education and established practices (1997). By opposing inclusive education as a general

pedagogy, detractors ascribe the following pedagogical roots to established/traditionalist pedagogy:

**Table 5-2: Epistemological and ethical roots of in-service teachers contesting IE**

Contestation of inclusive education by in-service teachers	
Epistemology	Ethics
Epistemological practices are fixed and determined by the subject or knowledge set it is related to – diverse teaching and learner practices secondary	Duty to provide the same education practice and opportunity to all learners – one size fits all narrative, specialised care outside of mainstream
Traditional teaching and learning practices of higher order than inclusive education practices – centred on aggregate that predetermines knowledgeability and capability measurement	Duty to not ‘water down’ existing education practices – focus on the aggregate practice on the projected ‘average student’
Scaffolded ability according to efficacy in competition	Responsibility to accurately record and identify achievers and foster the drive for competition in pedagogy
Type of learning institution has primacy – Knowledge and practices relevant to type of learner in the correct school should be endorsed	Responsibility to diagnose in order to place correctly
At best access to knowledge endorsed, not development on the individual level irrespective of environment	Responsibility to give all learners the same access and tuition in the same environment
Focus on measurable output, not individualised learner development for enhancement of capability to engage with world and ability to contribute to society	Duty to endorse outputs as key achievement – assumption that competitive standard will lead to enhanced citizens/required citizens

In light of this, inclusive education is described by its staunchest detractors as a policy that interferes with the general, mainstream practice of pedagogy. However, in broad, inclusive education can be divided into three ideologically rooted views on inclusive education in light of the SLR findings – inclusive education according to policy ideals, mixed-traditionalist inclusion approach, and inclusive education as addendum.

‘Inclusive education according to policy ideals’ are those reported views of inclusive education that ascribes to inclusive education those pedagogical ideals that are aimed for in the broader inclusive pedagogy interpretation (*cf.* 2.2). The ethical foundation for this approach is that inclusive education is based on human rights and the general duty assigned to education is to develop learners who are able to participate in and contribute to their society. Epistemologically speaking, it is accepted that diverse teaching practices and meaningful learning opportunities are possible and can contribute to overcoming barriers to learning and to enhance development on the individual level. Adapted and diverse teaching practices are also viewed as a means of overcoming systemic barriers affecting teaching and learning in general. The ideological roots for this approach to inclusive education can be summarised as follows:

**Table 5-3: Ideological roots for inclusive education according to policy ideals**

Inclusive education according to policy ideals	
Epistemological Roots	Ethical Roots
Diverse teaching practices possible and required – means of making learning meaningful and overcoming barriers to learning	Access to learning based in human rights – individual right to learning and development
Diverse capabilities, barriers, and strengths are expected and employed for knowledge construction on the individual level	Duty of education practitioners to include learners physically and in terms of teaching practices
Limitations with regard to knowledge type not pre-set – holds that meaningful practices that promote learning for diverse learners are possible	Responsibility to take into account that barriers to learning exist on the individual and systemic level – adjustment for meaningful teaching and learning events required



Diverse representation of student populace representative of actual society – accurate representation of social world will promote development of knowledge and skills to act therein	Duty to promote development of skills to collective and individually participate in society
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The ‘mixed-traditionalist inclusion’ approach primarily advocates the ethical root of inclusion as a human right, specifically as means to combat discrimination, but endorses inclusion as presence only (See Finding 2 and 4 of SLR – *cf.* 4.3.4.1). It is a marriage of traditionalist teaching practice and inclusion, but with the onus remaining on the learner to ‘fit’ in with the established practice. Learners experiencing barriers to learning are ‘welcomed’ in the mainstream, but are expected to meet established standard practices and are viewed as an additional stress. Epistemological roots of traditionalist education remain intact, with adjusted teaching practices still described as a specialist practice reserved for specialised settings alone.

The final approach and staunchest opposition to the endorsement of inclusive education practice in general is the ‘inclusive education as addendum’ view. Parties expressing this view are those that explicitly hold onto the epistemological and ethical positions summarised in Table 5-2 and ascribed to traditionalist education (*cf.* 2.4). From this perspective, inclusive education is understood in terms of the already established and dominant pedagogy. At best then, inclusive education is an addendum only relevant to clarify practices expected in specialised settings. As pedagogy, then, it would hamper general education practice as it is not applicable to the ‘norm’. Inclusive education would be an additional workload, which goes against the principles of standardised practice and competition, tailoring to struggling learners instead of establishing the standard that the average student should achieve. Epistemologically speaking, inclusive education would at best add an unnecessary workload seeing as pedagogical practices for the standard learner is already established. However, at worst, it would water down this established standard. Ethically speaking it would mean inclusive education is, at best, an idealistic but unpractical notion; but at worst it would impede teachers from fulfilling their responsibility to effectively provide mainstream learners with established teaching practices towards standardised outputs.

When it came to the evaluation of the purpose and application of inclusive education according to pre-service teachers and lecturers, a strong confirmation is made of what inclusive education as policy is prescribing in terms of education for all. Respondents confirm that inclusive education policy holds that it applies to all schools, involves all learners, and that there is a responsibility

assigned to teachers to attempt to overcome barriers to learning in their teaching practice. However, in responses to personal views on the applicability and responsibility of applying inclusive education in practice, a line is drawn by half the sample group with regard to specific subject fields. There are therefore limitations envisioned based on the type of subject or knowledge sets that are involved. Also, from the pre-service teacher sample group, the majority of the group also indicated that inclusive education as a responsibility should be dependent on the type of school the teachers find themselves in.

Consequently, for both the pre-service teacher and lecturer group, half of the sample groups indicate that they do not see a place for inclusive education when it comes to specific subjects or knowledge sets. Also, that responsibility cannot be placed on teachers to apply inclusive education in those contexts. Triangulation is achieved between the literature study, the SLR and the quantitative results with respect to parties responsible for inclusive education's application not addressing inclusive education as a general pedagogy or as a troublesome addition to established teaching practices. Even though there isn't specific mention made in the questionnaire as to which subjects or knowledge sets respondents imagine the standard applies to, the data indicates that a great section of the two population groups do not view inclusive education as a general pedagogical approach. Both epistemically and ethically, a limit for inclusive education as pedagogical practice is assigned based on the expected requirements of the established education practice. A predetermined standard is set as a predicate that requires a specific learner who will be able to benefit from that specific kind of subject and knowledge set. This is further exacerbated by a large section of the pre-service teaching group also indicating that inclusive education practice is a responsibility dependent on the type of school the teacher finds themselves employed at. For the pre-service teacher group, therefore, further entrenchment of the idea of separate practices for traditionalist and inclusive education is apparent.

### **5.5 How understanding inclusive education as ideology could contribute to its pedagogical applicability – applying Freire**

In Chapter 2, a comparison is done between traditionalist education and banking education, as well as similarities highlighted between critical education and inclusive education (*cf.* 2.3.2). The concept of banking education and critical education was famously coined by Paulo Freire, in his seminal work *Pedagogy of the Oppressed* (1993). Like traditionalist education, banking education was described as a standardised body of knowledge with established practices that serve the ends of an established status quo. The quality of the pupil in these forms of education is established based on the measurement of their ability to repeat or apply the knowledge in the exact same pattern or context as it was given by the teacher (Freire, 1993). The primary tenet is

learner meeting the benchmarks as set by the system, and not how the system could adapt to promote development of an empowered learner.

Critical pedagogy, as with inclusive education, sees the marginalised as part of society and education's responsibility as one of empowerment of all for the transformation of their world (Freire, 1993). Knowledge in this framework is a co-creational event, between learners and between learners and the teacher, so as to empower learners to critically reflect upon their world and develop a conscious intentionality, as well as skills and abilities, for grappling with reality (Freire, 1993). For both inclusive education and critical education, knowledge can only be effectively and relevantly explored and accurately constructed if the social milieu within which the process occurs is representative of the society the learners find themselves in. Also, as is the case for inclusive education, the emergent ethics of critical pedagogy lies in its centralised purpose of empowerment of learners to take part in and to shape their world (Freire, 1993). For inclusive education, however, it would include a teaching practice that actively aims at overcoming barriers to learning.

The key feature of Freire's work in terms of ideological roots, is the implications of the endorsed pedagogical approach's epistemological and ethical foundations. As a consequence of banking education's system- and teacher-orientated approach, Freire argues that the epistemological consequence is that education devolves into a process for representing and endorsing a static world (1993). Education becomes the tool for sustaining a world of invested interests, instead of the tool for empowerment of learners. It is damning in the sense that the epistemological success of teaching is then seated in its ability to sustain the status quo, an external benchmark that is separate from the individual and drained of the potential for the application of knowledge for navigation and participation in their immediate environment. It redefines knowledge construction from a typical human activity, of which the very potential is dependent on human interest and creativity, to a repetitious act for mirroring the established body of knowledge. The ethics embedded in this pedagogical approach is the active sustaining of the established order and practices for the purpose of determining the learners' place therein. Learners are made to fit, or moved around until they are fit in somewhere or are forgotten by the greater system. It is no wonder Freire thought of these practices as a 'lifeless' pedagogy (1993, p. 52), for the learner is not seen or invited as an active participant and applies pedagogy as an instrument that is not reflective of the parties that are immediately involved therein.

Contrary to this, critical pedagogy and inclusive education reflect different ideological roots. Critical pedagogy is also referred to as dialogical education, so as to describe the co-creational role and active participation of the participants in the pedagogy (Freire, 1993). The central tenet for critical pedagogy and inclusive education is therefore the inclusion of the learner in the

teaching and learning process. The aim of these pedagogies is to enable learners in developing the necessary knowledge and skills to productively contribute to their societies by placing the learner and their interests at the centre of their own learning. Pedagogical practices are to be adapted in order for the learner, in collaboration with peers and the educator, to form meaningful connections with content knowledge. The question the educator therefore asks is not, “Who are engaging with the lesson in class?”, but “How can teaching practices be adapted to involve learners actively and meaningfully in class?”. Ethically, there is therefore a call on the educator and the education system to include learners physically as well as in terms of their meaningful participation in their learning.

A counterpoint that could be launched at this division is that it is an unfair assessment of what education practitioners are attempting to achieve with traditionalist teaching practice. The educators are taking up a mantle of responsibility to train learners the necessary skill to participate in the world. It does not follow that these teachers are nefarious actors who apply practices simply to establish the social order or to protect a position of power. From Freire’s argument (1993), however, and why it is important to detangle the ideological roots and its implications, the inevitable consequence of this practice is a static epistemological world where creative and critical human ingenuity is supplanted with subservient placement, i.e. a docile and uncritical fulfilment of the status quo that is not necessarily in service of the agent’s interests. Another way to describe especially how epistemological processes differ between the two pedagogical approaches, is in the unpacking of the diverging focus on development for an end and development of learner abilities. In traditionalist education practices, teaching and learning is aimed to reach a standardised end, training *for* a specific purpose that is not immediately tied to the learner’s person or milieu. For inclusive education, teaching and learning is performed first and foremost for the development of the learner’s abilities to engage with their world. While the former could secure behaviours and responses that could meet specific ends, it does not ensure that development occurred in terms of the learner gaining the required knowledge and skills to meaningfully engage with their world. On the other hand, by shifting the focus to the primacy of the development of the learner’s ability to engage meaningfully with knowledge and skills, their investment in their own training is enhanced and the function of training for ends consequently has greater individual and collective value for learners.

Therefore, by viewing inclusive education as an ideology, we are enabled to re-evaluate its pedagogical implications in terms of its established epistemological- and ethical roots. In comparison with established pedagogical practices inclusive education comes up against, and the ideology these practices entrenches, the applicability of inclusive education is highlighted. Contrary to traditionalist epistemology, inclusive education promotes a teaching practice that is

learner-centred and focused on actual learner empowerment in the subjects they are taught. Pedagogy's purpose in this context is not primarily meeting a standardised end separate from the learner, but contextually relevant and meaningful development of knowledge and skills. Therein lies the ethical roots for inclusive education as well, a responsibility to empower learners so as to be enabled to individually and collectively contribute to their communities and society as a whole. A responsibility then follows for teachers and the greater education system as a whole to build systems and practices of inclusion that are aimed at overcoming barriers to learning.

A warning is issued by education practitioners that this approach would mean the inclusion of learners who are confronted with barriers that cannot be overcome in the mainstream, leading to lost time to focus on the majority of learners not experiencing severe barriers and actively harming the learner who is confronted with the barrier from gaining meaningful tuition (Andrews et al., 2019; Geldenhuys & Wevers, 2013; Materechera, 2020; Potgieter-Groot et al., 2012). However, what inclusive education proposes, as seen in its epistemological- and ethical roots, is that a generalised inclusive pedagogy be adopted. The premise therefore is that a general inclusive pedagogical approach, which is imbedded on an epistemology of empowerment through practices of inclusivity, would enable learners to overcome barriers to learning and thereby engage more productively and gain more from teaching - in the mainstream or otherwise.

It is also important to note that specialised support systems and settings are not dissolved in inclusive education policy (Department of Education, 1997). With an inclusive education pedagogical practice endorsed, the conclusion is that the learners who experience serious barriers to learning would find the support that they actually need. As a matter of fact, all learners would find the support they need. However, the first order of business is not the diagnosing for placement in specialised settings, but the collective education system promoting diverse teaching practices focussed on overcoming barriers to learning and engaging learners meaningfully. In the articles reviewed in the SLR, it was repeatedly noted that educators indicated that they were saddled with a burden due to the inclusion of learners experiencing barriers to learning (*cf.* 4.3.4.1.iv – vii). However, it was reported that adjusted teaching practices were omitted by teachers and not even considered a strategy to overcome barriers to learning, systemic or otherwise (Engelbrecht & Savolainen, 2018; Engelbrecht et al., 2017; Geldenhuys & Wevers, 2013; Maebana & Themane, 2019; Maguvhe, 2015; Mncube & Lebopa, 2019; Potgieter-Groot et al., 2012). As one researcher commented, teachers revert to what was called 'classical teaching' if support systems are not in place to take on learners experiencing barriers to learning (Engelbrecht & Savolainen, 2018) – the typical teacher-orientated approach ascribed to traditionalist pedagogy.

The opportunity to deliver a cost-effective way of implementing an education system responsive to all learners, as argued in EWP6 (Department of Education, 1997), is therefore missed. Instead of implementing inclusive education practices as the standard, and not opting for displacement due to barriers to learning that require specialist care as the exception, the result is an educative practice that forces learners to fit the standard or otherwise be frustratingly tolerated as present in classrooms, considered not capable of learning and destined to be moved to an ‘appropriate’ environment or to fail. Inclusive education does not remove the existence of specialised support, but orientates the system to first address barriers to learning that can be overcome in the mainstream before considering removing learners and placing them in settings for highly specialised care. It places the ethical responsibility for supporting the learning of all learners on the greater education community, instead of fostering a system that accepts the ‘norm’ and isolates the ‘marginals’.

From Finding 8 of the SLR (*cf.* 4.3.4.1), voices of teachers are heard that actually attempted inclusive education practices. A more recent occurrence is the increase of studies that are reporting on the successes of inclusive education practices of diverse teaching, albeit after intervention projects for promotion of these practices. A salient feature is the teachers in these circumstances reporting more active participation from their own side and increased confidence in their own abilities to teach all learners (eg. Mphahlele, 2020). This, however, demonstrates the effect of meaningful teaching practices alluded to by both Freire (1993) and Brantlinger (1997). When education practices are set up as events where the parties involved are active participants in the creation of knowledge and the development of skills, it is more meaningful to all participants and education becomes a process of empowerment (*cf.* 2.3). For Freire, this is the dividing line between pedagogy of lifelessness and a pedagogy of humanisation (Freire, 1993); in inclusive education terms, the dividing line between an education of diagnoses and an education for learning for all.

## **5.6 Recommendation and delimitations**

From the study, it can therefore be stated that understanding inclusive education as an ideology allows for evaluating and comparing its ethical and epistemological foundations with other pedagogical frameworks. In short, inclusive education is a pedagogical framework focussed on developing a teaching and learning environment that aims to foster learning for all. It is a pedagogical framework that promotes epistemological practices that enhances development for learners on the individual level through contextualisation and critical engagement. Inclusive education, like all other pedagogical frameworks, promotes an ethics for education that calls for institutional and teaching professionals to take on the mantle of responsibility for the learning of their wards. However, for inclusive education this means that inclusion is an end that needs to be

actively pursued in and through education. The responsibility lies not in simply enabling access to a standardised teaching and learning practice, but to develop systems and teaching practices that are aimed at meeting learner needs and overcoming barriers to learning.

From the results of the mixed methods study it is clear that a great section of the educator population in South Africa seems opposed to inclusive education on the grounds that it deviates from the traditionalist education norm. It is therefore recommended that training on the tertiary level and in practice need to occur where the ideological implications of inclusive education and other pedagogical frameworks are presented. In particular, training programmes or course material need to be developed to assist current and future education practitioners to avoid interpreting inclusive education through a traditionalist teaching lens and come to understand it as a proper, self-contained pedagogical framework. In Finding 8 of the SLR (*cf.* 4.3.4.1.viii) it seems that intervention strategies on the school level assist teachers in not only gaining a better understanding of inclusive education, but enables teachers to more successfully overcome typical issues that befall most South African schools. Whilst training that focusses on the epistemic and ethical consequences of pedagogical frameworks may go a long way in convincing teaching practitioners of the efficacy and promise of inclusive education, it is clear that practical guidelines as to how to adapt teaching practices for addressing barriers to learning is a requirement in terms of teacher training.

Whilst the mixed methods study had a robust SLR, the quantitative phase was executed on a convenience sampling basis (*cf.* 3.2.3). This meant for a small sample size for both pre-service teachers and the lecturer sample groups. The quantitative study could therefore be expanded to include other campuses and universities in different provinces, for comparisons in whether the population results are consistent or diverge in different areas of the country. Should significant deviations occur in specific regions, it would be an indicator that other successes or hindrances in teacher training occur in those regions. Such a comparative study could therefore show how deeply rooted ideological contestations really are and where we can go to learn of ways to improve on these divisions.

The developed theoretical framework for this study allows for the comparison of ideological roots of pedagogical frameworks and is applied as an emulation of the pedagogical comparisons performed by Freire (*cf.* 5.5). However, the development of a more in-depth and robust theoretical framework is possible. In particular, a more in-depth exploration of epistemic differences in knowledge sets and a more comprehensive look into the ontological consequences of specific epistemological and ethical roots can be pursued. Whilst the quantitative study did indicate that a great section of the sampled population holds the view that inclusive education is not relevant in the case of specific subject and knowledge sets and practices, it did not probe into what type of

knowledge sets the respondents had in mind. An adapted questionnaire or new qualitative study with interviews may yield specifics on the epistemological matter of diverse subject- or knowledge sets and practices, which can then direct the development of a more thorough theoretical framework that focuses on the epistemic features of these sets and practices. Data on such reported knowledge sets and practices where respondents intuit limitations for inclusive education would also highlight the subject fields for which practical examples of inclusive education practice could be developed. Arguably the development for these fields would then promote inclusive education practices in those areas where the greatest opposition lies.

Within several studies reviewed in the literature study and the SLR, a key issue noted by researchers as a hurdle for inclusive education practice is an inflexible curriculum – explicit expectations of a rigid teaching and learning programme with specific and unamendable assessments (eg. De Jager, 2011; Donohue & Bornman, 2014; Dreyer, 2017; Makoelle, 2014; Naicker, 2006). In the SLR it was found in Findings 4 through to 7 that the rigid structure is connected with traditionalist education practices and expectations (*cf.* 4.3.4.1), but it may also be a systemic issue brought on by departments of education's demands in terms of the unpacking of the curriculum and the requested reporting thereof that is saddled on teachers and schools. If a demand for a rigid curriculum and assessment practices are enforced from the departments of education, it would go against the spirit of their own EWP6 and will only serve to further frustrate the implementation of inclusive education in South African schools. For inclusive education to succeed, there has to be a measure of flexibility for educators to effectively amend teaching practices and assessments, so as to address barriers to learning and learning needs of all learners.

## **5.7 Conclusion**

In this mixed methods study, the views on the ethical and epistemological applicability of inclusive education held by current and future teaching practitioners were critically analysed. This analysis was done to show how epistemological and ethical claims form the 'ideological roots' of pedagogical frameworks. By identifying the particular ideological roots, the nature and implications of different pedagogical frameworks could be illustrated. Pedagogical frameworks are shown to be ideologies, with particular epistemological and ethical foundations, that are endorsed or contested on ideological grounds. By means of the data yielded by the qualitative SLR and the quantitative survey, it was argued that pre- and in-service educators that contest against the implementation of inclusive education do so from the context of an already established, traditionalist ideology of education practice. Inclusive education is therefore avoided or misapplied, due to an incorrect understanding of the ideological roots of inclusive education and the interference of an established ideology.



By means of a critical analysis, the two pedagogical frameworks are compared and their ideological roots properly described. By drawing on the Freirean comparison of banking education and critical education as exemplars, it is shown that the ideological roots of inclusive education and their pedagogical ends make it the preferred pedagogical framework. The South African education system and its learners are beset by hindrances, systemic and personal, that problematise teaching and learning. There are, however, pedagogical approaches that could serve to alleviate these hindrances and pedagogical approaches that will exacerbate them. If we are to establish an education for all, it is on the current and future educators of South Africa to ensure that ideological convictions that serve to address the learning of all learners are understood and pursued. It is through the lens of reviewing pedagogical frameworks as ethically and epistemologically rooted ideologies that we are best led to identify those practices that serve the greater call for education for all, and those practices that claim to be the best for all but serve other interests.

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# ANNEXURES

## Annexure A: Amended CASP appraisal document

### Appraisal tool for research inclusion

Assigned no:

Amended CASP (Critical Appraisal Skills Programme) checklist

Immediate exclusion criteria (1 point per yes. Less than 5 immediately excluded):

A. Does this study report on teacher views on inclusive education?

 Yes

Continue

 No

Exclude

B. Is this study conducted in the South African context?

 Yes

Continue

 No

Exclude

#### Section A: Validity of the results

1. Are the aims of the research stated clearly?

Yes	Can't Tell	No

Comments:

2. Is the research design the appropriate design for addressing the aims of the research?

Yes	Can't Tell	No

Comments:

3. Was the recruitment strategy apt with regards to the aims of research?

Yes	Can't Tell	No

Comments:

4. Was the data collected in a way that addressed the research issue?

Yes	Can't Tell	No

Comments:

5. Were the potential influence of contextual factors and researcher bias on research outcomes considered?

Yes	Can't Tell	No

Comments:

#### Section B: The results attained

6. Were ethical implications considered?

Yes	Can't Tell	No

Comments:

7. Was data analysis sufficiently rigorous?

Yes	Can't Tell	No

Comments:

8. Are findings clearly stated?

Yes	Can't Tell	No

Comments:

### Section C: Contribution to existing knowledge

9. Are the research findings valuable enough for contribution to this study and greater discourse on topic?

Yes	Can't Tell	No

Comments:

**Annexure A2: Example of completed CASP appraisal**

**Appraisal tool for research inclusion**

Assigned no: 2

Amended CASP (Critical Appraisal Skills Programme) checklist

Immediate exclusion criteria (1 point per yes. Less than 5 immediately excluded):

C. Does this study report on teacher views on inclusive education?

X	Continue	No	Exclude
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D. Is this study conducted in the South African context?

X	Continue	No	Exclude
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**Section A: Validity of the results**

10. Are the aims of the research stated clearly?

Yes	Can't Tell	No
X		

Comments:

11. Is the research design the appropriate design for addressing the aims of the research?

Yes	Can't Tell	No
X		

Comments:

12. Was the recruitment strategy apt with regards to the aims of research?

Yes	Can't Tell	No
X		

Comments:

Purposive with schools from variety of economic sectors.

13. Was the data collected in a way that addressed the research issue?

Yes	Can't Tell	No
X		

Comments:

14. Were the potential influence of contextual factors and researcher bias on research outcomes considered?

Yes	Can't Tell	No
	X	

Comments:

#### Section B: The results attained

15. Were ethical implications considered?

Yes	Can't Tell	No
	X	

Comments:

16. Was data analysis sufficiently rigorous?

Yes	Can't Tell	No
X		

Comments:

Sample groups from various socio-economic environments strengthening triangulation.

17. Are findings clearly stated?

Yes	Can't Tell	No
X		

Comments:

Themes clearly defined

### Section C: Contribution to existing knowledge

18. Are the research findings valuable enough for contribution to this study and greater discourse on topic?

Yes	Can't Tell	No
X		

Comments:

Themes akin to ideological markers.

**Annexure B: Data extraction tool**

**Inclusive education as ideology: Data extraction form**

Assigned no:

Data to be extracted	Data
Title of study	
Author	
Year of publication	
Study methodolog(ies)	
Study objective as stated by author(s)	
Size of sample(s)	
Inclusive education definition	
First order constructs	
Second order constructs	
Reference to knowledge / epistemological claims	
First order constructs	

Second order constructs	
Reference to ethics / responsibility claims	
First order constructs	
Second order constructs	
Role of inclusive education (pedagogical structure or purpose)	
First order constructs	
Second order constructs	

CASP assessment figure:

/11
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**Annexure B2: Example of completed data extraction tool**

**Inclusive education as ideology: Data extraction form**

Assigned no: 

23
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Data to be extracted	Data
Title of study	The idealism of education policies and the realities in schools: the implementation of inclusive education in South Africa
Author	Petra Engelbrecht, Mirna Nel, Suegnet Smit & Marichelle van Deventer
Year of publication	2016
Study methodolog(ies)	Case study + Interviews
Study objective as stated by author(s)	Focus on the development of policy and guidelines on inclusive education in dynamic interaction with the complexity of realities in South African schools
Size of sample(s)	Phase 1: 6 + Phase 2: 1
<b>Inclusive education definition</b>	
First order constructs	. They referred, for example, to education as a human right; the accommodation of diversity and no discrimination: ‘ ... Everyone must be included in one class, in one school ... ’p. 528
Second order constructs	The ambivalent views of teachers on the implementation of inclusive education, the dependence of teachers on a medical deficit approach to barriers to learning as well as their expressed

		need for the Department of Education to provide adequate support in the development of full-service schools were clearly identified in both phases of the research. P.528
Reference to knowledge / epistemological claims		
First constructs	order	As a result learners with disabilities were placed in separate classrooms and described in medical deficit terms: ‘ ‘ ... I feel that those children are expected to cope under normal circumstances but they are not normal ... ’p.528
Second constructs	order	The reason posed for this by the teacher is that mainstream classroom teachers struggle to accommodate the learners who, for example, experience reading and mathematical problems. They attribute this amongst others, to not being trained to provide the specialised support they think these learners need, too little time to attend to all the individual learners who experience barriers to leaning, too many learners in a class and a lack of learning support resources, including adapted reading material. P529  Strategies used include working as one group as well as dividing the class into three smaller groups based on ability, i.e. homogeneous ability groups.p529
Reference to ethics / responsibility claims		
First constructs	order	‘ ... Everyone must be included in one class, in one school ... ’p.528  The ELSEN classes still exist and are regarded according to the school principal as ‘ ... . to the advantage of the children in the end’ p.529
Second constructs	order	In both phases all participants were in general quick to define inclusive education according to the central principles of the Constitution as entrenched in the education legislation and White Paper 6.p.528

Role of inclusive education (pedagogical structure or purpose)	
First order constructs	
Second order constructs	

CASP assessment figure:

9/11
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## Annexure C1: Defining IE, first order constructs

Data Extraction by theme and construct				
First order: Defining IE				
Article	Extract	Page	Theme	Adjustment for more accurate placement/Other
2	'We're fortunate to have all the learning support facilities where kids can go. We have these facilities which we can refer children to'	8	IE for specialist care/Deficit model	
3	"[They] identify and diagnose the kids with the problems that haven't been diagnosed before. And then to make the teacher aware of a specific child's needs " (Reference to needs rather than issues with child)	77	IE for specialist care/Deficit model	
22	Our research in the four country contexts shows that the meanings and conceptions of IE are disparate, and reflect often-conflicting ideologies depending upon what discourses, contextual dynamics and language games shape particular enactments.	4	Disparate Definitions	Meta-analyses
23	They referred, for example, to education as a human right; the accommodation of diversity and no discrimination: ' ... Everyone must be included in one class, in one school ... '	528	Rights foundation of IE/Education for all	
27	"About inclusive, at our school we are, I think, the place is not for those learners. Maybe if I can say we do not have resources to accommodate those learners"	693	IE for specialist care/Deficit model	

34	<p>“[W]hen I read the White Paper [the EWP6], I tell myself it was just printed because it must be there. But, in reality, it is not applicable to us”.</p>	13	IE for specialist care/Deficit model	
47	<p>There are many ways of describing inclusive education, but in a nutshell, inclusive education caters for the needs of all learners in the school environment. Another participant added by saying: inclusive education is about teaching and learning, where a surety is given to the fact that all learners are participating actively in the lesson. This will mean that there is no discrimination, this will mean that there is no exclusion of any learner, in whatever, way, from whatever background of the learner, whatever language, race, religion, or physical condition, but if I have put it more academically, it is clearly indicated and pronounced by UNESCO and also explained by inclusive education White Paper 6, which I guess you could be able to peruse and assist yourself in terms of getting the core definition of inclusive education.</p>	72-73	Rights foundation of IE/Education for all	
47	<p>inclusive education is the kind of education where the interests of all learners, especially those from the disadvantaged or designated groups of the population are catered for.</p>	73	Rights foundation of IE/Education for all	
47	<p>On this, one participant said: Learners are actually different in many ways. There are those learners who have disabilities that are so significant that they require special education or special services to reach their potential.</p>	74	Extensive barriers may call for extensive support	

49	'Transformation towards inclusive education ... no! We need to admit all learners. How can our school admit and cater for them while we are not trained, equipped and better prepared, and without any facelift of the infrastructure?' (Teacher from school A)	4	IE for specialist care/Deficit model	
52	"We cannot teach learners with disabilities; they must go to special schools."	131	IE for specialist care/Deficit model	
57	Yes, inclusive education should be accessible and responsive to all learners. They are all South Africans and shouldn't be discriminated.	778	Rights foundation of IE/Education for all	
69	"It (IE) means we must include all learners irrespective of their disabilities"; "We can include learners in both planning and teaching"; and "We can even include them in other activities like extramural activities". "IE is about mixing learners of all.....learning abilities and disabilities. Let them learn together without segregation of any sort."	221	Rights foundation of IE/Education for all	
76	... and the learner gets transferred to a school where he or she will fit.	911	IE for specialist care/Deficit model	

79	The only thing is that I-I-my worry is, X must leave those learners, attend to that one learner and it takes time and time, uh consuming because those other learners are, are going to be left behind.	8	IE for specialist care/Deficit model	
81	"... mix them [disabled learners] with those that are 'normal' in the mainstream class".	362	Basic 'inclusion' - with the 'normal'	
81	"Disabled people have not created themselves ... they were made disabled by certain circumstances, and society should not think	362	Rights foundation of IE/Education for all	

	of them as outcasts ... or people that we should pity all the time.”			
84	And if things were right, even us we will be having special classes [sic], but at the moment, we have to teach them together.	9	IE for specialist care/Deficit model	
84	Another thing we had thought of . . . if the department can provide this school with a different classroom where such learners can learn practical subjects, maybe woodwork or something, so as to help them when they go out.	10	Basic 'inclusion' with the 'normal'	
84	It is about all schools catering for normal learners and learners with different disability.	11	Basic 'inclusion' with the 'normal'	
84	For example, one teacher defined inclusive education as when 'normal learners and disabilities learners learn together.	11	Basic 'inclusion' with the 'normal'	
115	I can say I love it (inclusive education) so much, it must be kept because we are all the same and equal. Nobody must be discriminated. We only have to ensure that we have the necessary resources so that all could be catered for.	337	Rights foundation of IE/Education for all	

## Annexure C2: Defining IE, second order constructs

Article	Data Extraction by theme and construct			
	Second order: Defining IE			
	Extract	Page	Theme	Note
2	However, for many, solutions to make education accessible to all were associated with the ideas of special needs thinking in line with an individual deficit model of difference.	8	IE for specialist care/Deficit model	
2	All teachers understand IE as accessibility of education for learners, but majority understand it as specialised settings for specialised needs as prerequisite.	8	Education for all vs Specialist Care	
2	Bell-curve thinking permeating IE, specialised setting according to need, not a holistic approach.	12	IE for specialist care/Deficit model	
2	An ideal, not a priority	13	Idealistic - not practical	
2	Research has found that without support, the burdens associated with implementation quickly become overwhelming to school officials and they swiftly revert back to a special education model of education delivery.	10	IE for specialist care/Deficit model	
16	These results may tie into the findings of previous research that found teachers often hold the least favourable views of inclusion for children with multiple and severe disabilities.	55	IE for specialist care/Deficit model	



18	When discussing what they understood about an inclusive school, some teachers remarked that all schools are not inclusive yet and that the only inclusive schools in the region were two which had established a specific resource classroom for learners with high support needs.	651	IE for specialist care/Deficit model		
18	In some schools their understanding of what constituted an inclusive school appeared to be related directly to the provision of a special classroom rather than their willingness to accept all learners from their community	651	IE for specialist care/Deficit model		
18	In other schools they considered inclusion to be simply the acceptance of students with disabilities into their schools	651	IE for specialist care/Deficit model	Basic 'inclusion' - with the 'normal'	
20	However, staff were engaging with who is included and who is excluded in the particular context, and they have made the decision to shift the imperative of inclusion beyond disability issues.	114	Rights foundation of IE/Education for all	Broader interpretation of IE: After intervention	
23	The ambivalent views of teachers on the implementation of inclusive education, the dependence of teachers on a medical deficit approach to barriers to learning as well as their expressed need for the Department of Education to provide adequate support in the development of full-service schools were clearly identified in both phases of the research.	528	IE for specialist care/Deficit model		

26	South African teachers were less concerned about the inclusion of students with disabilities in their own classrooms than their Finnish counterparts were. Furthermore, South African teachers showed no difference between the general idea of inclusion and the specific idea of recognising human rights by including students with disabilities in their own classrooms.	669	Rights foundation of IE/Education for all	Ethics: Human rights responsibility
28	In contrast, the vast majority of South African teachers clearly emphasised the concept of the rights of students, including those with disabilities, to participate in mainstream classrooms and to become full members of their school and wider communities.	313	Rights foundation of IE/Education for all	Ethics: Human rights responsibility
39	Results from the SA sample show that SA teachers agree to a greater extent that the problem belongs to the student rather than to school contextual barriers.	114	IE for specialist care/Deficit model	In conjunction with 115 (also, note that this is older research)
39	With regard to this it could also be noted that SA teachers have a stronger opinion that inclusive policy is not important for all schools.	115	IE for specialist care/Deficit model	
69	The connotation was that young teachers have some knowledge about IE because IE was recently incorporated in teacher training programmes since the world declaration of IE.	211	Rights foundation of IE/Education for all	Compared to older research like entry 39
77	The teachers' acknowledgement that learners with impairments have to be accepted into mainstream schooling, and their decisive attitude towards assistance from special schools in accomplishing the objective...	87	Rights foundation of IE/Education for all	

81	The study revealed that although the admission of disabled children to the school was well intentioned, deficit thinking and the pathologising of the lived experiences of disabled learners shaped teachers' understandings of inclusion.	360	IE for specialist care/Deficit model	
103	An interesting difference is that whereas South African teachers showed no difference in the general idea of inclusion and the concrete idea of recognising human rights by including children	64	Rights foundation of IE/Education for all	
108	All participants indicated that inclusive education promotes education for all children irrespective of their disability so that they can be educated in the same classroom with other learners of their age. People who have little understanding of inclusion believe that learners who experience barriers to learning need to be placed in separate classes	28	Rights foundation of IE/Education for all	
108	They pointed out that the system gives every learner an opportunity to participate fully in the process of learning	29	Rights foundation of IE/Education for all	

111	Furthermore, misunderstandings and misperceptions of the concept of inclusion also appear to frustrate its implementation.	185	Disparate definitions of IE	
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### Annexure C3: Epistemological claims, first order constructs

Data Extraction by theme and construct					
First order: Epistemological Claims					
	Extract	Page	Theme	Additional notes	
2	“I find it very difficult because I think CAPS moves way too fast and so I struggle with, you know, how do I get that one kid to understand when he’s going to take three weeks, when you just have to move and move and move?”(Reference to adjusted curriculum and assessment in general.	10	Epistemic limitations/unquestioned Curricula or teaching practice	Learners should 'fit' in / Not normal	
23	As a result learners with disabilities were placed in separate classrooms and described in medical deficit terms: ‘ ‘ ... I feel that those children are expected to cope under normal circumstances but they are not normal ... ’	528	Epistemic limitations/unquestioned Curricula or teaching practice	Learners should 'fit' in / Not normal	
34	As one participating educator reasoned, “Now why must you teach the child something that you know he will not be able to do in 20 years’ time?” The following comment is typical of the sentiments that were expressed by participating educators regarding differentiated assessment: “[I]t doesn’t matter whether it is a child with a learning barrier or a brilliant child, they are treated the same. Our hands are chopped off”	10	Epistemic limitations/unquestioned Curricula or teaching practice	Learners should 'fit' in / Not normal	
52	The teachers were reluctant to discover alternative ways of teaching inclusively; for instance, during one of the brainstorming meetings, one remarked: “I think when people	131	Epistemic limitations/unquestioned Curricula or teaching practice	Not considered IE as relief	

	teach they follow their own philosophy about what constitutes an inclusive teaching.”				
52	[[Only after Intervention]] For example, one teacher stated: “We are now aware that we can develop inclusive practices by ourselves to suit our context; we cannot cling to practices we used in the past without question.”	132	Adjusted curricula/teaching practice for IE success		
57	They will think, ‘where will we get the time to start including all these children?’	779	Epistemic limitations/unquestioned Curricula or teaching practice	Learners should ‘fit’ in / Not normal	
57	We didn’t er-er- receive training as-as teachers who will teach learners with special needs. Because I think that-that is another ... with special needs in education. You see, if we erer undergo training, then it will be better. Then-then we can – we will know how to deal with this kind of a child’	781	Epistemic limitations/unquestioned Curricula or teaching practice	Specialised curricula/practices required	

61	Lungiswa: When you identified this learner, I take her intervention book and let her work from my table. I give the rest of the class work to do, and I work with that learner according to her pace. I find this difficult because we have big numbers in our classes. Vuma explained that she ... take[s] those learners that are struggling and try to work with them individually. I don’t do that more often, I must say. You see, I am in the Intermediate Phase and we change periods. I don’t see the time in 40 minutes to accommodate these learners. Wendy said that she ... group[s] my learners and their	6	Epistemic limitations/unquestioned Curricula or teaching practice	Separate curriculum and strategies	
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	work is not going to be the same. Those that are struggling, I give them work that is at their level.				
63	Most of the challenges facing us educators are that almost all of us are not trained to work with learners who are having problems or difficulties... we are just going astray, not knowing how to help these learners. [[In context of non-adjusted lesson plans]]	149	Epistemic limitations/unquestioned Curricula or teaching practice	Separate curriculum and strategies	
69	“You know why we cannot just tell you clearly how we are supporting these learners.....is just because even ourselves as teachers we .....do it by default.....”	211	Adjusted curricula/teaching practice for IE success		
69	“Teachers must be remediated.....to mix methods and not use the lecture method only..... there must be support structures in the schools.”	212	Adjusted curricula/teaching practice for IE success		
69	“The system must make sure specialised resources are there.....”	212	Adjusted curricula/teaching practice for IE success		

76	... it is still difficult to deal with such learners because we are expected to 'support' them, but we are never taught or trained to do that; and The district office who are supposed to help by giving support are very few and allocated many schools, [so] we don't get immediate attention.	913	Epistemic limitations/unquestioned Curricula or teaching practice	Not considered IE as relief
79	Even I, as a teacher, I didn't do remedial at school. So sometimes it's difficult to teach with those kids. It's very difficult.	8	Epistemic limitations/unquestioned Curricula or teaching practice	Learners should 'fit' in / Not normal
81	This boy, Sabelo, is very good. He even beats those that are normal.	361	Epistemic limitations/unquestioned Curricula or teaching practice	Learners should 'fit' in / Not normal
84	. . . So I'm just thinking like if it's gonna be more work . . . It's gonna give us more work when there are learners who need special attention and there are special problems as well.	12	Epistemic limitations/unquestioned Curricula or teaching practice	Not considered IE as relief
92	"I taught my whole class through role play how to handle teasing"; "Having a good response with positive reinforcement, I have recently introduced little toys for showing positive behaviour over time."	67	Adjusted curricula/teaching practice for IE success	

108	[[AFTER INTERVENTIONS]]: "my attitude has changed positively towards learners in general. I am now diverse in terms of activities that I plan for my learners ... I have automatically developed my own tactics to cope with different learning problems ... I have managed to change learners with learning difficulties"	32	Adjusted curricula/teaching practice for IE success	
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115	‘I always make sure that I adjust the lesson to cater for all intelligences that I have in my class.’ One participant indicated that when presenting the lesson, one topic is being presented in various forms, for example, when teaching fractions, others would be given drawings and visuals, others written numbers, others word sums while others would sing a song on the same topic.	337	Adjusted curricula/teaching practice for IE success	Compared to older articles (2019)
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**Annexure C4: Epistemological claims, second order constructs**

Data Extraction by theme and construct					
Second order: Epistemological Claims					
	Extract	Page	Theme		
2	Academic achievement dulled by IE (viewpoint of top achieving schools)	11	Epistemic limitations/unquestioned Curricula or teaching practice	Weaker curriculum/does not fit requirements	
2	Curriculum set framework for knowledge, efficacy is measured by the achievement in keeping up and excelling in prescriptive curriculum. (Note – narrow curriculum with set dates, timeframes and assessments- ie one size fits all).	10 to 11	Epistemic limitations/unquestioned Curricula or teaching practice	Weaker curriculum/does not fit requirements	



16	Overall, the results suggested that teachers expected relatively little reading and mathematics progress for each of the learners, as evidenced by the low means in both academic areas. They also uniformly reported that attending a mainstream class would facilitate learners' social development more than their intellectual development.	54	Epistemic limitations/unquestioned Curricula or teaching practice	Specialised curricula/practices required	
			Social development and not epistemic	Specialised curricula/practices required	
18	The majority of staff did not believe that learners who were unable to cope with the current curriculum should be included. In particular, learners with an intellectual disability were considered to be best placed within a special school	651	Epistemic limitations/unquestioned Curricula or teaching practice	Specialised curricula/practices required	

18	According to the teachers the learners 'want us to spoon-feed the work' and don't care about their school work because they have no pride in it and because the parents do not instil academic pride in the children.	655	Epistemic limitations/unquestioned Curricula or teaching practice	Weaker curriculum/does not fit requirements	
19	They indicated that their department heads expected them to complete a specified volume of work within a given time period while simultaneously	354	Epistemic limitations/unquestioned Curricula or teaching practice	Weaker curriculum/does not fit requirements	

	assisting students who are experiencing barriers to learning.				
23	The reason posed for this by the teacher is that mainstream classroom teachers struggle to accommodate the learners who, for example, experience reading and mathematical problems. They attribute this amongst others, to not being trained to provide the specialised support they think these learners need, too little time to attend to all the individual learners who experience barriers to leaning, too many learners in a class and a lack of learning support resources, including adapted reading material.	529	Epistemic limitations/unquestioned Curricula or teaching practice	Specialised curricula/practices required	
23	Strategies used include working as one group as well as dividing the class into three smaller groups based on ability, i.e. homogeneous ability groups.	529	Epistemic limitations/unquestioned Curricula or teaching practice	Specialised curricula/practices required	
26	On the other hand, South African teachers who do not have access to adequate support systems, rely heavily on what they call 'classical teaching' based on a more traditional teacher-centred teaching approach.	670	Epistemic limitations/unquestioned Curricula or teaching practice	Learners should 'fit' in / Not normal	

27	South African teachers rely heavily on a traditional behaviourist approach, where direct teaching is employed as method to instruct students. As a result, 'drilling in' of concepts and content and 'repetition' of learner activities are mentioned as commonly used strategies to ensure that learners have acquired all the necessary knowledge.	695	Epistemic limitations/unquestioned Curricula or teaching practice	Learners should 'fit' in / Not normal	
34	"...because of the educators' unrealistic expectations that these learners must perform at the same cognitive or physical level as their more able peers, which results in prolonged absenteeism or dropping out."	9	Epistemic limitations/unquestioned Curricula or teaching practice	Learners should 'fit' in / Not normal	
34	The findings revealed that the participating educators seldom employed a variety of teaching techniques to accommodate diverse learning styles of learners and to provide equal development opportunities for all learners or used alternative modes of assessment.	10	Epistemic limitations/unquestioned Curricula or teaching practice	Learners should 'fit' in / Not normal	

47	We observed that teachers only made use of one medium of instruction when presenting their lessons. This was the case in all participating schools, and the principles of individual attention and differentiation of instructional strategies were not applied.	75	Epistemic limitations/unquestioned Curricula or teaching practice	Learners should 'fit' in / Not normal	High account of positive IE - yet nonadjusted strategies
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63	From the review of document, it was also found that all the four schools presented lesson plans which did not clearly outline pertinent strategies for dealing with barriers to learning, nor was it evident, from the observations, how learners with learning disabilities were accommodated.	149	Epistemic limitations/unquestioned Curricula or teaching practice	Learners should 'fit' in / Not normal	
69	Mainly, lecturing and only verbal and individual learner activities lacked flexibility as one of the principles of inclusive teaching meant one-size -fit all curriculum delivery.	211	Adjusted curricula/teaching practice for IE success		
81	Classroom cultures and practices were clearly constraining to the students with disabilities and learning difficulties. The vision of an inclusive school encapsulated in Education White paper 6 was not evident in the classroom spaces.	361	Adjusted curricula/teaching practice for IE success		
111	There is thus a perceived inability to manage diversity, often resulting in feelings of fear and hopelessness and in learners being referred for assessment by a specialist, diagnosis and placement in special programmes.	186	Epistemic limitations/unquestioned Curricula or teaching practice	Skills based on training/traditional education	

## Annexure C5: Ethical claims, first order constructs

Data Extraction by theme and construct						
First order: Ethics Claims						
Article	Extract	Page	Theme		Additional notes	Adjustment for more accurate placement/Other
2	“We need to take into consideration that there are twenty-four other children in the class [whose parents are] paying prime money to be here, to be extended [academically] and enriched, and anything that gets in the way of this process could be limiting”	9	Prohibits ethical teaching practice (Focus away from 'normal')			
23	‘ ... Everyone must be included in one class, in one school ... ’	528	Human right responsibility / Education for all		Defining IE and Ethics intertwined	
34	“I will not be able to give justice to an inclusive class, because...the training is lacking”	9	Prohibits ethical teaching practice (Focus away from 'normal')			
43	“School Management Team members are also educators, they have classes, and they are teaching, they have the same problems, so they cannot help us with Inclusive Education in our classrooms”	182	IE for specialist care/Deficit model			Inclusive practice

43	<p>“Why should we worry about these learners, compulsory education is up to Grade 9, who has time for these learners? They are wasting our time, this is a hopeless situation and there is nothing we can do about it, we must just find a way of getting rid of them as quickly as possible, I am sick and tired of them, they get on my nerves all the time”</p>	183	<p>Prohibits ethical teaching practice (Focus away from 'normal')</p>			
49	<p>‘We are aware that ... learners are members of our communities and [by] admitting them for the sake of admitting, we shall be committing a serious crime. I think if we do not teach them like any child we ... admit, we have failed’. (Teacher from school A)”</p>	4	<p>Prohibits ethical teaching practice (Focus away from 'normal')</p>			
76	<p>As a result, a medical perspective still appears to be evident among teachers and health professionals, whereby a barrier to learning continues to be seen as a deficit within the learner, and the responsibility still resides more with the specialists to support the learner instead of it being a shared responsibility.</p>	914	<p>Prohibits ethical teaching practice (Focus away from 'normal')</p>	<p>IE for specialist care/Deficit model</p>		
81	<p>“We still experience attitudinal problems from us as teachers. Some teachers do not want to have anything to do with that child. People had been praying that “Let them not come to my class.”</p>	364	<p>Prohibits ethical teaching practice (Focus away from 'normal')</p>	<p>Additional burden: IE for specialist care/Deficit model</p>		

## Annexure C6: Ethical claims, second order constructs

Data Extraction by theme and construct						
Second order: Ethics Claims						
	Extract	Page	Theme		Additional Notes	
2	Idealistic, not guiding principle. Not education for all, execution of curriculum the priority.	13	Idealistic - not practical			
2	Therefore, the ethos of pursuing academic success above other educational goals is motivated by parents.	11	Idealistic - not practical	Competitiveness	key principle	
23	In both phases all participants were in general quick to define inclusive education according to the central principles of the Constitution as entrenched in the education legislation and White Paper 6.	528	Human right responsibility		Defining IE and Ethics intertwined	
26	In contrast, South African teachers link the concept of human rights in society in general and the specific right of all students to become full members of school communities to their definition of inclusion.	670	Human right responsibility			

28	In contrast, the vast majority of South African teachers clearly emphasised the concept of the rights of students, including those with disabilities, to participate in mainstream classrooms and to become full members of their school and wider communities.	313	Human right responsibility			
57	According to some teachers in the study, equal access to a single inclusive education system is imperative but inequalities of the past should be addressed and accessibility and responsiveness to all learners should be privileged.	778	Human right responsibility			
57	Though teachers agreed with the principle of inclusive education and rights-based pedagogies, the existing frustration with regards to time could cause teachers to see inclusive education as impractical and even unrealistic.	779	Idealistic - not practical			
57	She believes that only especially trained teachers should teach learners who experience barriers to learning	781	Prohibits ethical teaching practice (Focus away from 'normal')			

77	It should be noted by the authorities in both Sweden and South Africa that the majority of teachers are in favour of including learners with special needs in mainstream schooling.	87	Human right responsibility			
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## Annexure C7: Role of IE, first order constructs

Data Extraction by theme and construct				
First order: IE practice				
Article	Extract	Page	Theme	Connection with other item
2	'Let's get this child tested, let's see which learning environment will suit him and move that child to a place of learning where he will enjoy it, because the child is frustrated here with me'. Teresa from School A also extolled the benefits of referring learners to other sources of support saying,	8	Best practice: Specialist care/Deficit model	Definition
2	'We're fortunate to have all the learning support facilities where kids can go.'	10	Best practice: Specialist care/Deficit model	Definition
2	Issue with CAPS, IE requires time and openness, restrictive curriculum counterproductive and makes IE problematic.	10	Systemic limitations	Not considered IE as relief
20	"We don't cater for the learning only. We need to look at the social part as well."	119	Broader interpretation of IE	
27	About inclusive, at our school we are, I think, the place is not for those learners. Maybe if I can say we do not have resources to accommodate those learners.	693	Best practice: Specialist care/Deficit model	Ethics: Prohibits ethical teaching practice (Focus away from 'normal')
24	"I am not used to working with such a learner. I find it particularly difficult to adjust unit plans because I also have a gifted learner in the class."	301	Additional demand	Epistemic through curricula
24	"I was only trained to teach normal children in the mainstream."	302	Additional demand	Epistemic through curricula
			IE for specialist care/Deficit model	

49	‘I suspect this could be due to unclear roles each and every stakeholder has to play or [the] thinking [that] somebody else [will] play dual or triple roles. For instance, as a teacher, my role is to teach and not make provisions for resources, policy, etc.’ (Teacher from school A).	4	Epistemic limitations/unquestioned Curricula or teaching practice	Learners should 'fit' in / Not normal
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52	It also became apparent that teachers were not used to probing, reflecting on, and critiquing how inclusive their teaching practices were; for instance, one remarked: “We teach the way we think it would be inclusive as individual teachers, without bothering about what is going on in other classes.”	191	Epistemic limitations/unquestioned Curricula or teaching practice	Learners should 'fit' in / Not normal
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57	Inclusive education can work if classes are not too big. So more educators need to be employed because if the classes are big as it is now, where some teachers are having 52, it’s terrible; there is not even space in the class for moving around. That’s why I say the teachers are already negative about this inclusive education ...	780	Systemic limitations	Not considered IE as relief
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57	... teachers in the study are caught up in a dilemma between human rights and complex realities at the school level.	783	Idealistic - not practical	
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43	“The learners fail because they do not make any effort to perform better. They are aware that they will be condoned due to age. It becomes very discouraging for the learners who work hard to be promoted because they find themselves in the same grade with learners who they know did not make it to that grade. It is very discouraging! It is also frustrating for the educators when we take the schedule to		Systemic limitations	Not considered IE as relief
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	the District and the failed learners come back as condoned”.p.183			
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61	“This school is said to be an inclusive, the department just said so without coming to us and ask whether we want. Now when we are complaining about these learners, they say we must remember that we are an inclusive school.” Wendy: “The department must consult with us first before the implementation of the policy. It must stop to make decisions for us, because the policies are implemented by us.”	6	Systemic limitations	Not considered IE as relief
76	The problem with the child, when you see this child is having difficulty you really need to get some professional help if you are a teacher or even somebody who is more empowered, a psychologist or psychiatrist, anybody who can be able to empower you being a teacher because I have been trained being a teacher but in some other aspects we still need more basics or how to deal with the problem of the child.	911	Epistemic limitations/unquestioned Curricula or teaching practice	Skills based on training/traditional education
79	This year most of our learners are much better. That’s much better, they are okay, they are all, and they are able to read with the help of the remedial classes yes.	6	Epistemic limitations/unquestioned Curricula or teaching practice	Specialised curricula/practices required

79	[[However]] For example, in remedial education we have been given a sort of a book where we photocopy activities and the learner does the activities but at the end of the day I don't know what to do if he is still not coping with those lessons. ... it was, a-a workshop for one of the educators.	7	Epistemic limitations/unquestioned Curricula or teaching practice	Specialised curricula/practices required
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84	[[NOT ALL NEGATIVE]] In fact, I would like to start tomorrow; I would like to experience new things. I want to see how it [inclusion] is going to take place because we have had such children before who have problems, who have different needs. Really we have not had problems because you know we work as a team.	84	Optimism	
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92	[[PRIOR INTERVENTION]] "They exhausted me mentally and physically. We can't cope, these children should go somewhere when they are young, and get it sorted before they release them into mainstream"	65	Epistemic limitations/unquestioned Curricula or teaching practice	Learners should 'fit' in / Not normal
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113	One thing that does bother me with the way we do it here is that, with this pull-out system, you got children out of the classroom constantly. I mean my Wednesdays are nightmares. Before school starts until home time. There is somebody out of my classroom all the time on a Wednesday. One point in time there are 10 of them that are out for therapy at the same time, which makes teaching very difficult and I don't know... that is something we need to find a way to regulate.	117	Adjusted curricula/teaching practice for IE success	Specialist care/Deficit model hampers teaching
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113	Pull out system hampers IE!	117	Adjusted curricula/teaching practice for IE success	Specialist care/Deficit model hampers teaching
43	“School Management Team members are also educators, they have classes, and they are teaching, they have the same problems, so they cannot help us with Inclusive Education in our classrooms”	182	IE for specialist care/Deficit model	

## Annexure C8: Role of IE, 2nd order constructs

Data Extraction by theme and construct					
Second order: IE practice					
	Extract	Page	Theme	Connection with other theme	Additional notes
6	Teachers with considerable experience with learners with academic barriers may be more realistic and knowledgeable about the barriers that learners with LNFS face, such as when trying to make friends or being isolated from their peers. The best way to eventually overcome these realities is for teachers to strive to create welcoming and inclusive classroom climates that foster acceptance of all classroom learners, whether they have barriers to learning or not.	110	Adjusted curricula/teaching practice for IE success		
6	A lack of supports probably hinders the academic achievement of learners who experience barriers to learning and frustrates teachers who, on their own, experience difficulties overcoming the learners' academic barriers. These frustrations can contribute to negative teacher attitudes toward inclusive education.	99	Systemic limitations	Not considered IE as relief	

14	In the closing section of this article, I will offer two intertwined arguments—one, which calls upon a re-imagined way of being and seeing the world, and the other, which holds that it is through a diverse teaching corps that learners and society might begin to imagine and believe in a socially just world. (Theoretical argument – does not address inclusive education directly)	173	Social justice relies on inclusion (Researcher position)		
16	In terms of the adjustments that teachers reported they would need to make, they generally reported that to include any of the learners mentioned in the vignettes they would need to structure their lessons differently and make some adaptations to the curricula.	56	Adjusted curricula/teaching practice for IE success		
18	<b>The reason they were positive about this was that they considered this would make their jobs safe if they had sufficient enrolments in their school. They were very worried about losing staff if learner numbers should fall, as unemployment rates of teachers were increasing nationally with 15000 to 20000 unemployed per year (Department of Education,</b>	654	<b>Misplaced optimism</b>	<b>Ethics</b>	

	<b>2005d).(Focus on securing jobs, not pedagogical effects)</b>				
19	The teachers mentioned that a high number of students in the classroom made it difficult for them to adequately teach in inclusive classrooms.	354	Additional demand	Epistemic through curricula	
19	Insufficient Resources. Teachers indicated insufficient human resources as one of the challenges of inclusive education, as well as one of the main starting points for support for teachers in inclusive education.	354	Systemic limitations	Not considered IE as relief	
19	The participants ignored the distinctions between broad education challenges, such as large classes, and the challenges of inclusive education. This blurred distinction has consequences... They did not recognize that inclusive education can bring relief in terms of time pressure, and that individual assistance is not a key aspect of inclusive education.	354	Systemic limitations	Not considered IE as relief	



20	For example, two separate transition classes for learners experiencing difficulties in learning were established, which were later discontinued by staff on the basis of their reflexive evaluation of the lack of benefits of these structures in terms of the goal of inclusive and quality education for all.	115	Adjusted curricula/teaching practice for IE success	Specialist care/Deficit model hampers teaching	As with the psychologist support papers – where SBST or viewpoints of other specialists are involved, more positive stances are taken with regards to what is understood as inclusive education or diversity.
22	In South Africa the establishment of remedial units as well as separate “special classes” for learners with learning difficulties, specifically in the context at the fullservice school, may be viewed as a contradiction.	5	IE for specialist care/Deficit model	Defining IE	

27	As a result, especially the group of South African teachers do not acknowledge the presence of any strengths, either in themselves or in their context, that can contribute to a reconception of the way they view inclusive classrooms, in order to develop a broader and more fluid definition of inclusive education, as formulated in education policies since 1994.	699	Systemic limitations	Not considered IE as relief	
27	At the same time, in South Africa, despite there being strong policy support and positive attitudes, the many contextual challenges (e.g. lack of pedagogical support, less than adequate training and large classes) make it very difficult for teachers to find their own solutions to issues of diversity and, consequently, collaboration with the experts tends to take the form of referring students with special educational needs to services beyond the general-education classroom.	698	Systemic limitations	Not considered IE as relief	
39	Both the Swedish and the SA teachers are somewhat hesitant about the feasibility of practically implementing... There is however a difference, as the SA teachers are more optimistic than the Swedish teachers	114	Potential		

77	In South Africa in particular, where IE has not been part of the pre-1994 school system, teachers often feel threatened and unsure about inclusive practices in their classrooms	88	Epistemic limitations/unquestioned Curricula or teaching practice	Specialised curricula/practices required	
79	Although many teachers are positive about inclusion, the main areas of concern are training for inclusion; appropriate curricula for all learners; available resources and school and classroom structures that impede inclusion.	6	Systemic limitations	Not considered IE as relief	
81	Within this schooling context, all five teachers understood their role as helping disabled learners do 'normal' things, in order for them to gain the required amount of social capital, the condition of which was to become 'more like us'	360	Epistemic limitations/unquestioned Curricula or teaching practice	Learners should 'fit' in / Not normal	
111	However, participants also believed that inclusion can benefit learners with and without special needs in terms of facilitating acceptance and understanding of each other.	185	Rights foundation of IE/Education for all	Indicated benefits	

## Annexure D: GRADE-CERQual report

Review Finding	Studies contributing to finding	Constructs from articles	Assessment of Methodological Limitations	Assessment of Adequacy	Assessment of Coherence	Assessment of relevance	Overall CERQual Assessment of Confidence	Explanation of Judgement
IE for specialist care/Deficit model - first order and second order constructs reveal a persistent expectation from teachers that separate specialised care structures should exist for learners who experience barriers to learning. Repeated references to 'they' having to have specialised classrooms and specialised care structures due to 'their conditions/who they are'. The role indicated for IE is to apply the best specialised judgements to determine which environments and care suits which learners (medical model practices of screening for separating).	2, 3, 16, 18, 23, 27, 34, 39, 49, 52, 76, 79, 81, 84	1st order: 10, 2nd order: 11	High - CASP process already applied weeding low methodological trust papers. Also, majority of articles scored 8+ in process.	High - tracks in articles from 2003 up to 2019	High - reflects preceding research and high occurrence rate over diverse research methodologies.	High - connects with view that understanding of IE will inform epistemic and ethical standpoint, and vice versa.	High confidence	Repeated first order construct, 2nd order construct and theoretical reference to medical model stance or promotion of separate, specialised care.
Basic 'inclusion' - with the 'normal' - Teachers indicating that IE is a process of placing learners experiencing barriers to learning in 'everyday' classrooms - but merely as practice of physical inclusion only, and not that IE envisions educational adjustments for all.	18, 24, 81, 84	1st order constructs: 4, 2nd order constructs: 1	High - 9 CASP scores	High - connects with disparate viewpoints on IE and deficit model reactions - teachers oppose inclusion as learners won't 'fit'.	Moderate - reflects preceding research, but fewer explicit reports of this stance taken made by teachers.	High - connects with view that understanding of IE will inform epistemic and ethical standpoint, and vice versa.	Moderate confidence	Moderate: Other review findings does indicate that this is the position held by most - that education changes through physical inclusion of learners experiencing barriers to education and not education adjusting to include all learners.

Rights foundation of IE/Education for all - Teachers and researchers reporting that IE is founded on the rights of learners for inclusion in general society and that it has a role to play in terms of both inclusion and acceptance.	20, 23, 26, 28, 47, 57, 69, 77, 81, 103, 108, 111, 115	1st order constructs: 7, 2nd order constructs: 9	High - CASP process already applied weeding low methodological trust papers. Also, majority of articles scored 8+ in process.	High - tracks especially in articles from 2011 up to 2019 (when the discourse of IE in SA schools would have been more widespread)	High - reflects preceding research and high occurrence rate over diverse research methodologies.	High - connects with view that understanding of IE will inform epistemic and ethical standpoint, and vice versa.	High confidence	Repeated first order construct, 2nd constructs and theoretical reference to teachers in SA supporting the rights-based foundation of IE and principles of inclusion in society.
Epistemic limitations/unquestioned Curricula or teaching practice: Learners should 'fit' in / Not normal - Teachers in opposition to IE reference that the curriculum and general teaching practice is not ideal for learners with barriers. The issue is not 'traditional teaching practice', the problem is that learners cannot learn like 'normal' learners.	2, 23, 26, 27, 34, 47, 49, 52, 57, 63, 79, 81, 92,	1st order constructs: 9, 2nd order constructs: 8	High - CASP process already applied weeding low methodological trust papers. Also, majority of articles scored 8+ in process.	High - tracks in a variety of articles from 2011 to 2020	High - reflects preceding research and high occurrence rate over diverse research methodologies.	High - addresses epistemic underpinning for IE directly	High confidence	Repeated first order construct, 2nd order construct and theoretical reference to teachers in SA expecting learners to fit curricula and that learners experiencing barriers to learning cannot be 'taught' in 'normal' classes.
Epistemic limitations/unquestioned Curricula or teaching practice: Specialised curricula/practices required - Teachers indicating that learners experiencing barriers to learning require specialised curricula and assessments that supports separate teaching and learning opportunities and spaces.	16, 18, 29, 57, 61, 63, 77, 79	1st order constructs: 5, 2nd order constructs: 5	High - CASP process already applied weeding low methodological trust papers. Also, majority of articles scored 8+ in process.	High - tracks in a variety of articles from 2011 to 2020	High - reflects preceding research and high occurrence rate over diverse research methodologies.	High - addresses epistemic underpinning for IE directly	High confidence	Repeated first order construct and 2nd order construct referring to teachers in SA adapting for or requesting additional training for separate learning practices for learners experiencing barriers to learning.

Epistemic limitations/unquestioned Curricula or teaching practice: Weaker curriculum/does not fit requirements - Teachers indicating that IE cannot be applied as it will dilute the current curriculum to feed the needs of those experiencing barriers to learning.	2, 18, 19	2nd order constructs only (4)	High - CASP process already applied weeding low methodological trust papers.	High - correlates with preceding categories on expecting learners to 'fit in' (reluctance to adjust curricula) and preference for specialised classrooms and curricula.	High - reflects preceding research and correlates with other epistemic-related claims and expectations reported on.	High - addresses epistemic underpinning for IE directly	Moderate confidence	Although these responses correlate with other epistemic claims, fewer explicit constructs on the matter. However, further clarifies teacher expectations/arguments for specialised practices rather than inclusion.
Epistemic limitations/unquestioned Curricula or teaching practice: Not considered IE as relief - Teachers note various reasons that impede IE as teaching practice based on exiting teaching/learning issues ranging from systemic issues such as overloaded classrooms, additional workload diverse learners may suggest, training gaps for specialised lesson presentations etc. Noted here is that IE is not viewed as an instrument to help solve current teaching/learning issues, but is viewed as an additional strain.	2, 6, 19, 24, 27, 43, 52, 57, 61, 76, 79, 84	1st order constructs: 9, 2nd order constructs: 7	High - CASP process already applied weeding low methodological trust papers. Also, majority of articles scored 8+ in process.	High - tracks in articles from 2003 up to 2020	High - reflects preceding research and high occurrence rate over diverse research methodologies.	High - addresses epistemic underpinning for IE directly	High confidence	Repeated first order and 2nd order constructs referring to teachers IE as additional impediment rather than resolution.
Adjusted curricula/teaching practice for IE success - In more recent articles, teachers have been adapting their approach to the curriculum and their own teaching practices - reporting greater success for IE and education in general. In two cases, explicit mention is even made on how traditional/medical model-based practices impede teaching and learning.	16, 20, 52, 69, 81, 92, 108, 113 115,	1st order constructs: 9, 2nd order constructs: 4	High - CASP process already applied weeding low methodological trust papers. Also, majority of articles scored 8+ in process.	High - tracks in articles from 2011 up to 2019 (when the discourse of IE in SA schools would have been more widespread and impacted more schools directly)	High - reflects preceding research and high occurrence rate over diverse research methodologies.	High - addresses epistemic underpinning for IE directly	High confidence	Repeated first order construct, 2nd order construct and theoretical reference to teachers in SA experiencing success when adjusting teaching practices in general in response to diverse learner groups.

<p>IE as Human Rights responsibility - teachers indicate that IE is understood as a human rights issue (connected with policy and the constitution). Teachers and the institution therefore have a responsibility to include barriers to learning (although the definition of on inclusion differs dramatically - as seen in the other themes).</p>	<p>23, 26, 28, 57, 77</p>	<p>1st order constructs: 1, 2nd order constructs: 5</p>	<p>High - CASP process already applied weeding low methodological trust papers. Also, majority of articles scored 8+ in process.</p>	<p>High - tracks in a variety of articles from 2011 to 2020</p>	<p>High - reflects preceding research and occurrence rate over diverse research methodologies.</p>	<p>High - addresses ethical underpinnings for IE directly</p>	<p>High confidence</p>	<p>Strong general occurrence, especially in comparative studies between different countries. Also correlated with the defining of IE theme, here it is also noted that there is responsibility to address the learning of learners experiencing barriers to learning, albeit potentially in separate environs.</p>
<p>Prohibits ethical teaching practice (Focus away from 'normal') - In some studies there are teachers who hold the ethical argument that inclusion in 'normal' environments is the morally dubious approach. They argue that IE creates unfair situations in contemporary, competitive, meritocratic, 'normal' classrooms for learners experiencing barriers to learning; adds additional time and training demand for teachers to be enabled to do specialised individual teaching; and that all this leads to additional individualised attention for struggling learners which detracts from the responsibility towards the 'normal' learners.</p>	<p>2, 27, 34, 43, 49, 57, 76, 81</p>	<p>1st order constructs: 7, 2nd order constructs: 2</p>	<p>High - CASP process already applied weeding low methodological trust papers. Also, majority of articles scored 8+ in process.</p>	<p>High - tracks in a variety of articles from 2011 to 2020</p>	<p>High - reflects preceding research and occurrence rate over diverse research methodologies.</p>	<p>High - addresses ethical underpinnings for IE directly</p>	<p>High confidence</p>	<p>Majority first order constructs of teachers addressing the issue of inclusion in terms of duties.</p>
<p>IE is idealistic, not practical - In two recent studies, researchers noted that teachers saw IE only as an ideal, but not a priority to be pursued.</p>	<p>2, 57</p>	<p>Only 2nd order constructs (5)</p>	<p>High - Both articles scored 9 in CASP appraisal.</p>	<p>Moderate - not high rate of occurrence, but both very recent articles</p>	<p>Moderate - although it is an accounted for occurrence in preceding research, only two recent studies explicitly reference it as an idealistic notion</p>	<p>High - addresses ethical and epistemic underpinnings for IE directly</p>	<p>Moderate to minor confidence</p>	<p>Moderate: Occurrence was predicted and is accounted for in the preceding research, but only explicitly referenced in two recent studies. Stance, however, correlates argument for ethical responsibilities to the 'normal' children in teaching and inclusion as human rights responsibility, albeit meaning inclusion in specialised settings.</p>

## Annexure E: ENTREQ items

**Table 1 Enhancing transparency in reporting the synthesis of qualitative research: the ENTREQ statement**

No	Item	Guide and description
1	Aim	State the research question the synthesis addresses.
2	Synthesis methodology	Identify the synthesis methodology or theoretical framework which underpins the synthesis, and describe the rationale for choice of methodology (e.g. <i>meta-ethnography, thematic synthesis, critical interpretive synthesis, grounded theory synthesis, realist synthesis, meta-aggregation, meta-study, framework synthesis</i> ).
3	Approach to searching	Indicate whether the search was pre-planned ( <i>comprehensive search strategies to seek all available studies</i> ) or iterative ( <i>to seek all available concepts until they theoretical saturation is achieved</i> ).
4	Inclusion criteria	Specify the inclusion/exclusion criteria (e.g. <i>in terms of population, language, year limits, type of publication, study type</i> ).
5	Data sources	Describe the information sources used (e.g. <i>electronic databases (MEDLINE, EMBASE, CINAHL, psycINFO, Econlit), grey literature databases (digital thesis, policy reports), relevant organisational websites, experts, information specialists, generic web searches (Google Scholar) hand searching, reference lists</i> ) and when the searches conducted; provide the rationale for using the data sources.
6	Electronic Search strategy	Describe the literature search (e.g. <i>provide electronic search strategies with population terms, clinical or health topic terms, experiential or social phenomena related terms, filters for qualitative research, and search limits</i> ).
7	Study screening methods	Describe the process of study screening and sifting (e.g. <i>title, abstract and full text review, number of independent reviewers who screened studies</i> ).
8	Study characteristics	Present the characteristics of the included studies (e.g. <i>year of publication, country, population, number of participants, data collection, methodology, analysis, research questions</i> ).
9	Study selection results	Identify the number of studies screened and provide reasons for study exclusion (e.g. <i>for comprehensive searching, provide numbers of studies screened and reasons for exclusion indicated in a figure/flowchart; for iterative searching describe reasons for study exclusion and inclusion based on modifications to the research question and/or contribution to theory development</i> ).
10	Rationale for appraisal	Describe the rationale and approach used to appraise the included studies or selected findings (e.g. <i>assessment of conduct (validity and robustness), assessment of reporting (transparency), assessment of content and utility of the findings</i> ).
11	Appraisal items	State the tools, frameworks and criteria used to appraise the studies or selected findings (e.g. <i>Existing tools: CASP, QARI, COREQ, Mays and Pope [25]; reviewer developed tools; describe the domains assessed: research team, study design, data analysis and interpretations, reporting</i> ).
12	Appraisal process	Indicate whether the appraisal was conducted independently by more than one reviewer and if consensus was required.
13	Appraisal results	Present results of the quality assessment and indicate which articles, if any, were weighted/excluded based on the assessment and give the rationale.
14	Data extraction	Indicate which sections of the primary studies were analysed and how were the data extracted from the primary studies? (e.g. <i>all text under the headings "results /conclusions" were extracted electronically and entered into a computer software</i> ).
15	Software	State the computer software used, if any.
16	Number of reviewers	Identify who was involved in coding and analysis.
17	Coding	Describe the process for coding of data (e.g. <i>line by line coding to search for concepts</i> ).
18	Study comparison	Describe how were comparisons made within and across studies (e.g. <i>subsequent studies were coded into pre-existing concepts, and new concepts were created when deemed necessary</i> ).
19	Derivation of themes	Explain whether the process of deriving the themes or constructs was inductive or deductive.
20	Quotations	Provide quotations from the primary studies to illustrate themes/constructs, and identify whether the quotations were participant quotations of the author's interpretation.
21	Synthesis output	Present rich, compelling and useful results that go beyond a summary of the primary studies (e.g. <i>new interpretation, models of evidence, conceptual models, analytical framework, development of a new theory or construct</i> ).



## **Annexure F: Memorandum of Understanding with Deputy Dean – data collection from lecturers**

GOODWILL LETTER – RESEARCH ASSISTANCE

Dear Deputy Dean

As part of the completion of my registered M study, Inclusive education as ideology: a critical analysis of its pedagogical applicability, a quantitative study is to be performed with pre-service teachers and lecturers. The quantitative study is an online, Likert-scale questionnaire comprising of 20 questions. The instrument is designed to yield data on pre-service teachers' perceptions on the epistemological and ethical applicability of inclusive education.

In order to attain relevant data, the lecturers at the Vaal campus have been identified as the key sample group representative of education lecturers for this study. As Faculty of Education lecturers they have extensive exposure to teaching practice guidelines and have knowledge of the policies that govern education practice in South Africa – including Whitepaper 6 and inclusive education as education practice requirement.

However, in order to get access to the lecture group, a communication medium will be required to announce the opportunity to partake in this research and share the research link. To curtail this issue, I would like to ask if the internal VC mailing list can be used by the independent researcher to advertise the research and share the link to the research survey and consent form.

The benefits of such an approach for the Faculty of Education will be:

- An opportunity for staff to participate in this study in inclusive education;
- A reminder that research remains a salient part of our practice as lecturers
- An example of online research practice, considering our current circumstances.

Should you consent to this approach, the researcher will inform EduRec and the Gatekeeper committee in lieu of their approval of this approach. I, the researcher, will still be responsible to ensure that all ethical requirements are met – you therefore carry no risk in terms of ethics authorization or adherence to ethics requirements. There will be no impact privacy of the lecturers, the assistance required will be access for the VC mailing list that will send out the advertisement and link, thereby securing anonymity of participation or decision not to take part in the study. By agreeing to this approach, the independent researcher will send through two announcements – one advertising the research, and one providing the link to the online survey. There is no risk identified for the lecturers in partaking in the study, and the potential data costs for participation will be clearly communicated in the adverts and the online survey.

I hope you share in the view of the mutual and professional benefit that such an approach might lend.

Yours sincerely,  
Eddie Kok

The details of the research are as follows:

**TITLE OF THE RESEARCH PROJECT:**

**Inclusive education as ideology: a critical analysis of its pedagogical applicability.**

PROJECT SUPERVISOR: Prof M Nel  
CONTACT NUMBER: 016 910 3095

MEMBER OF PROJECT TEAM MEd student: Eddie Kok  
CONTACT NUMBER: 016 910 3577

**FACULTY OF EDUCATION RESEARCH ETHICS COMMITTEE**

Contact person: Ms Erna Greyling, E-mail: Erna.Greyling@nwu.ac.za, Tel. (018) 299 4656

This study has been approved by the Research Ethics Committee of the Faculty of Education of the North-West University and will be conducted according to the ethical guidelines of this committee and that of the Research Data Gatekeepers Committee (RDGC).

**What is this research about?**

The aims of this research are:

- Ascertain the views of current pre-service teachers regarding inclusive education as an ideologically rooted pedagogy, specifically its epistemological and ethical applicability.
- Ascertain the views of current BEd lecturers regarding inclusive education as an ideologically rooted pedagogy, specifically its epistemological and ethical applicability.
- To determine how these views relate to an understanding of inclusive education as an ideologically rooted pedagogy.

**Participants**

- Pre-service teachers, i.e. 4<sup>th</sup> year BEd students
- BEd lecturers of pre-service teachers

**What is expected of the participant?**

Participants will be expected to take part in the completion of a closed Likert scale questionnaire. They will be required to answer a number of questions which are related to the purpose of the study. The completion of the closed Likert scale questionnaire should take approximately 30 minutes of their time.

**Benefits to the participant**

There are no direct benefits for the participants. The research may, however, contribute information that could motivate improved instruction on the pedagogical applicability and application of inclusive education.

**Risks involved for participants**

Minor risk. The only risks identified related to taking part in this research is an experience of boredom and the required time from their schedule for completion of the questionnaire. In order to mitigate this risk, the questionnaire was refined to only 20 questions.

**Confidentiality and protection of identity**

Anonymity and confidentiality will be ensured as all questionnaires are completed anonymously. Only the researcher and the supervisor, Prof M. Nel, will have access to the answers and the findings of the research. Data will be kept safe and secure by locking hard copies in locked cupboards and electronic copies will be password protected.

If you have any further questions or enquiries regarding the application to conduct this research, please contact the researchers for more information.

I, Elize Küng, hereby accept the conditions and merits of the proposal for collaboration.



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Signature and date: 12 September 2020

## **Annexure G: Memorandum of Understanding with Work-integrated Learning Coordinator – data collection from Students**

GOODWILL LETTER – RESEARCH AND WIL COLLABORATION

Dear esteemed lecturer

As part of the completion of my registered M study, Inclusive education as ideology: a critical analysis of its pedagogical applicability, a quantitative study is to be performed with pre-service teachers and lecturers. The quantitative study is an online, Likert-scale questionnaire comprising of 20 questions. The instrument is designed to yield data on pre-service teachers' perceptions on the epistemological and ethical applicability of inclusive education.

In order to attain relevant data, the 4<sup>th</sup> year BEd students at the Vaal campus have been identified as the key sample group representative of pre-service teachers. At 4<sup>th</sup> year study level, BEd students have had extensive exposure to teaching practice, had modules aimed specifically at addressing inclusive education and learning support strategies, and had at least 3 years to reflect on their own teaching practice.

However, in order to get access to the 4<sup>th</sup> year group, a compulsory module for the entire year group would be ideal for data collection. The added problem is that the preferred practice is the use of a class for data collection only when the study is directly related to the specific module. With this study not measuring specific features related to a module, and rather the broader understanding of inclusive education's role in education in South Africa by pre-service teachers with extensive enough experience of education practice, justification for research during a contact session due to its relation to a specific module will not be possible. To curtail this issue, I would like to ask if the survey can be shared on the WIL 2020 Vaal platform during the second semester of 2020.

The benefits of such an approach for WIL and the students enrolled would be:

- First-hand, practical experience of quantitative research focussed on pedagogical practice;
- Concrete example of a quantitative research instrument designed for pedagogical practice research;
- Practical experience of the informed consent process and ethical procedures of research gathering related to pedagogical practice;
- A reminder for all 4<sup>th</sup> year students that inclusive education policies and pedagogical strategies remain in important factor in teaching and learning.

Should you consent to this approach, the request will inform EduRec and the Gatekeeper committee in lieu of their approval of this approach as well. I, the researcher, will still be

responsible to ensure that all ethical requirements are met – you therefore carry no risk in terms of ethics authorization or adherence to ethics requirements. There will be no impact on the learning platform, the assistance required will be access for the independent researcher to send through two announcements – one advertising the research, and one providing the link to the online survey. There is no risk identified for the learners in partaking in the study, and the potential data costs for participation will be clearly communicated in the adverts and the online survey.

I hope you share in the view of the mutual and educational benefit that such an approach might lend.

Yours sincerely,  
Eddie Kok

The details of the research are as follows:

**TITLE OF THE RESEARCH PROJECT:**

**Inclusive education as ideology: a critical analysis of its pedagogical applicability.**

PROJECT SUPERVISOR: Prof M Nel

CONTACT NUMBER: 016 910 3095

MEMBER OF PROJECT TEAM MEd student: Eddie Kok

CONTACT NUMBER: 016 910 3577

FACULTY OF EDUCATION RESEARCH ETHICS COMMITTEE

Contact person: Ms Erna Greyling, E-mail: Erna.Greyling@nwu.ac.za, Tel. (018) 299 4656

This study has been approved by the Research Ethics Committee of the Faculty of Education of the North-West University and will be conducted according to the ethical guidelines of this committee and that of the Research Data Gatekeepers Committee (RDGC).

**What is this research about?**

The aims of this research are:

- Ascertain the views of current pre-service teachers regarding inclusive education as an ideologically rooted pedagogy, specifically its epistemological and ethical applicability.

- Ascertain the views of current BEd lecturers regarding inclusive education as an ideologically rooted pedagogy, specifically its epistemological and ethical applicability.
- To determine how these views relate to an understanding of inclusive education as an ideologically rooted pedagogy.

#### **Participants**

- Pre-service teachers, i.e. 4<sup>th</sup> year BEd students
- BEd lecturers of pre-service teachers

#### **What is expected of the participant?**

Participants will be expected to take part in the completion of a closed Likert scale questionnaire. They will be required to answer a number of questions which are related to the purpose of the study. The completion of the closed Likert scale questionnaire should take approximately 30 minutes of their time.

#### **Benefits to the participant**

There are no direct benefits for the participants. The research may, however, contribute information that could motivate improved instruction on the pedagogical applicability and application of inclusive education.

#### **Risks involved for participants**

Minor risk. The only risks identified related to taking part in this research is an experience of boredom and the required time from their schedule for completion of the questionnaire. In order to mitigate this risk, the questionnaire was refined to only 20 questions.

#### **Confidentiality and protection of identity**

Anonymity and confidentiality will be ensured as all questionnaires are completed anonymously. Only the researcher and the supervisor, Prof M. Nel, will have access to the answers and the findings of the research. Data will be kept safe and secure by locking hard copies in locked cupboards and electronic copies will be password protected.

If you have any further questions or enquiries regarding the application to conduct this research, please contact the researchers for more information.

I, Dr C S Botha, hereby accept the conditions and merits of the proposal for collaboration.



\_\_\_\_\_  
Signature and date

## Annexure H: EduRec Ethics approval



Fakulteit Opvoedkunde / Faculty Education  
Privaatsak / Private Bag X6001, Potchefstroom  
Suid-Afrika / South Africa 2520  
T: 018 299 4656  
F: 086 661 8589  
<http://www.nwu.ac.za>

16 June 2020

I hereby confirm that ethics application, as stated below, was approved at the Ethics Committee meeting of the Faculty of Education of 30 April 2020.

**Ethics number: NWU-01619-19-A2**

**Project head: Prof M Nel**

**Project team: E Kok (MEd student – 21190275)**

**Title: Inclusive education as ideology: a critical analysis of its pedagogical applicability**

**Extended period granted: 30 April 2020 – 30 April 2021**

Clearance given for only one year. Extension can be requested after a year.

**Risk level: Low**

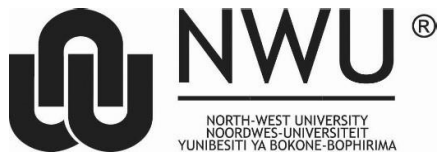
Should you have further enquiries in this regard, you are welcome to contact Prof Jako Olivier at 018 285 2078 or by email at [Jako.Olivier@nwu.ac.za](mailto:Jako.Olivier@nwu.ac.za) or Ms Erna Greyling at 018 299 4656 or by email at [Erna.Greyling@nwu.ac.za](mailto:Erna.Greyling@nwu.ac.za) .

Yours sincerely



Prof J Olivier - Chair Edu-REC

## Annexure I: NWU Gatekeeper approval



Private Bag X6001, Potchefstroom  
South Africa 2520

Tel: +2718 299-1111/2222 Web:

<http://www.nwu.ac.za>

Research Data Gatekeeper Committee

Based on the documentation provided by the researcher specified below, on 14/09/2020 the NWU Research Data Gatekeeper Committee (NWU-RDGC) hereby grants permission for the specific project (as indicated below) to be conducted at the North-West University (NWU):

Project title: Inclusive education as ideology: a critical analysis of its pedagogical applicability

Project leader: Prof M Nel

Researcher/Project Team: E Kok

Ethics reference no: NWU-01619-19-A2

NWU RDGC reference no: NWU-GK-2020-051

Specific Conditions:

- Due to the COVID-19 pandemic the Committee would like to advise the researcher to practice the necessary caution and adhere to the National COVID-19 Guidelines when conducting research with participants.

Approval date: 14/09/2020

Expiry date: 13/09/2021

General Conditions of Approval:

- The NWU-RDGC will not take the responsibility to recruit research participants or to gather data on behalf of the researcher. This committee can therefore not guarantee the participation of our relevant stakeholders.
- 

Any changes to the research protocol within the permission period (for a maximum of 1 year) must be communicated to the NWU-RDGC. Failure to do so will lead to withdrawal of the permission. The NWU-RDGC should be provided with a report or document in which the results of said project are disseminated.

Please note that under no circumstances will any personal information of possible research subjects be provided to the researcher by the NWU RDGC. The NWU complies with the Promotion of Access to Information Act 2 of 2000 (PAIA) as well as the Protection of Personal



Information Act 4 of 2013 (POPI). For an application to access such information please contact Ms Annamarie De Kock (018 285 2771) for the relevant enquiry form or more information on how the NWU complies with PAIA and POPI.

The NWU RDGC would like to remain at your service as scientist and researcher, and wishes you well with your project. Please do not hesitate to contact the NWU RDGC for any further enquiries or requests for assistance

Yours sincerely



Prof Marlene Verhoef

Chairperson NWU Research Data Gatekeeper Committee

Original details: (22351930) C:\Users\22351930\Desktop\test 2.docm  
13 November 2018

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Current details: (22351930) M:\DSS1\8533\Monitoring and Reporting Cluster\Ethics\Applications RDGC\Updated RDGC Permission Letter.docm 15  
November 2018

File reference: 1.1.4.3

1

## Annexure J: List of articles prior CASP appraisal

1. Adams, J. D., & Mabusela, M. S. (2015). Pre-service Educators' Attitude towards Inclusive Education: A Case Study. *Journal of Social Sciences*, 43(1), 81-90. doi:10.1080/09718923.2015.11893425
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5. Bornman, J., & Donohue, D. (2014). The challenges of realising inclusive education in South Africa. *South African Journal of Education*, 34(2), 1-14. doi:doi:10.10520/EJC153713
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## **Annexure K: List of articles included in data extraction and GRADE-CERQual report**

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## Annexure L: Self-constructed survey for students and link to online version

<https://www.questionpro.com/t/AQ5iyZiU96>

**RESEARCH PROJECT:** Inclusive education as ideology: a critical analysis of its pedagogical applicability

Thank you for participating in this study and in agreeing to complete the questionnaire. The purpose of this questionnaire is to measure pre-service teachers' and their lecturers' understanding of the pedagogical applicability of Inclusive Education – with a specific focus on the understood theoretical applicability of Inclusive Education as an education policy pursuit, the epistemological applicability of Inclusive Education and the ethical applicability of Inclusive Education. The questionnaire consists of a few bibliographical questions and twenty pedagogical questions related to inclusive education and will take approximately 30 minutes to complete. Please answer all the questions as honestly as possible.

### QUESTIONNAIRE

#### **SECTION A: Biographical questions – Pre-service teachers**

➤ **Please complete the following information by encircling the most appropriate number applicable to you.**

##### **A1. Indicate your phase of specialization for the qualification being studied**

Foundation phase	1
Intermediate phase	2
Senior / FET	3

**A2. If you selected Intermediate or Senior/FET phase in the previous question, indicate your subject field of specialization (if more than one applies, please indicate the numbers in the “More than one” comment box)**



STEM subjects: Science (physical and life sciences), Technology, Engineering, Maths	1
Social sciences (including geography and history)	2
Languages	3
Economic sciences	4
More than one:	

**A3. In how many of your modules is Inclusive Education addressed?**

Only the primary module on Inclusive education	1
Less than five	2
Five and more	3

**SECTION B: Inclusive Education and policy**

- Please consider the following statements critically and indicate to what extent do you agree/disagree by encircling the most appropriate number. Encircle only ONE option.

		Strongly Disagree	Disagree	Agree	Strongly Agree
B1	Inclusive Education should be a priority to be achieved by all schools	1	2	3	4
B2	Inclusive Education is of concern only for special needs schools	1	2	3	4

B3	Inclusive Education is reserved for specialised settings or classrooms	1	2	3	4
B4	Inclusive Education applies to all subjects	1	2	3	4
B5	Inclusive Education applies to specific curricula designed for specialised settings	1	2	3	4
B6	Inclusive Education applies to all teachers and all curricula	1	2	3	4

<b>Answer the following questions by encircling one option</b>	
B7	Inclusive Education, as required by Education White Paper 6 – <i>Special Needs Education: Building an Inclusive Education and Training System</i> , is aimed at addressing the needs of:
	All learners 1
	Learners who experience barriers to learning in all classrooms 2
	Learners who experience barriers to learning in specialized settings (for example: Special classrooms) 3
	Learners with special needs in special schools 4
B8	In your opinion, should Inclusive Education be aimed at addressing the learning needs of:
	All learners 1
	Learners who experience barriers to learning, within any classroom 2
	Learners who experience barriers to learning, but within a specialized settings (for example: Special classrooms) 3
	Learners with special needs in special schools 4

**SECTION C: Inclusive Education and pedagogical applicability: Knowledge**

- Please consider the following questions related to Inclusive Education and pedagogical practice in terms of subject content knowledge. Encircle only ONE option.

C1	In the everyday classroom, Inclusive Education applies to:	
	All subject fields	1
	Specific subject fields	2
	Specific content sections within relevant subject fields	3
	No subject fields outside of specialised settings	4

C2	The following classrooms should apply Inclusive Education as practice in the everyday classroom:	
	All classrooms	1
	All classrooms should apply Inclusive Education, except for subjects dealing with 'hard facts' (for example: physical science, maths and life sciences)	2
	Only the subjects that deal with personal life skills	3
	Inclusive Education should only apply to specialised settings (for example: special curricula in special schools or classrooms)	4

**Please answer the following questions by encircling one option**

	Strongly Disagree	Disagree	Agree	Strongly Agree
C3	1	2	3	4

C4	Pedagogical practices in all subject fields should be adapted to address special learner needs	1	2	3	4
C5	The content knowledge of any subject field can be unpacked within an Inclusive Education framework	1	2	3	4
C6	The type of knowledge contained in a subject field determines whether Inclusive Education applies as practice	1	2	3	4

**SECTION D: Inclusive education and pedagogical applicability: Ethical requirement**

- **Please consider the following questions related to Inclusive Education and pedagogical practice in terms of ethical requirements. Encircle only ONE option.**

		<b>Strongly Disagree</b>	<b>Disagree</b>	<b>Agree</b>	<b>Strongly Agree</b>
D1	It is the responsibility of the teacher to adapt their pedagogical practices to address individual learner needs	1	2	3	4
D2	It is the responsibility of the teacher to adapt their teaching practices to ensure inclusivity	1	2	3	4
D3	It is the responsibility of the teacher to adapt their teaching practices to address the needs of all learners	1	2	3	4
D4	It is the responsibility of the teacher to use Inclusive Education as a framework for their teaching practice	1	2	3	4
D5	The responsibility of a teacher with regard to applying Inclusive Education as a pedagogical approach depends on the type of school they are employed at (for example a mainstream school, a full-service school or a special school)	1	2	3	4

D6	A teacher's responsibility with regard to applying Inclusive Education is dependent on the type of subject content knowledge being taught (for example fractions in math or general life skills)	1	2	3	4
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**Thank for your participation and contribution to this study.**

**Annexure M: Self-constructed survey for lecturers and link to online version**

<https://www.questionpro.com/t/AQ5iyZiWmR>

**RESEARCH PROJECT:** Inclusive education as ideology: a critical analysis of its pedagogical applicability

Thank you for participating in this study and in agreeing to complete the questionnaire. The purpose of this questionnaire is to measure pre-service teachers' and their lecturers' understanding of the pedagogical applicability of Inclusive Education – with a specific focus on the understood theoretical applicability of Inclusive Education as an education policy pursuit, the epistemological applicability of Inclusive Education and the ethical applicability of Inclusive Education. The questionnaire consists of a few bibliographical questions and twenty pedagogical questions related to inclusive education and will take approximately 30 minutes to complete. Please answer all the questions as honestly as possible.

### **QUESTIONNAIRE**

#### **SECTION A: Biographical questions – Lecturer**

**Please complete the following information by encircling the most appropriate number applicable to you. Indicate the school within the faculty in which you are employed**

Language education	1
Psycho-social education	2
Professional studies in education	3
Mathematics, science and technology education	4
Commerce and social studies in education	5

**A2. Indicate for how many years you have been employed as a lecturer within your faculty**

0-1	1
2-4	2
5 and longer	3

**A3. How often do you address Inclusive Education in your module(s)?**

At least once a term	1
Several times a term	2
Only when the module outcomes require it	3
Not applicable to my modules	4

**SECTION B: Inclusive Education and policy**

- **Please consider the following statements critically and indicate to what extent do you agree/disagree by encircling the most appropriate number. Encircle only ONE option.**

		<b>Strongly Disagree</b>	<b>Disagree</b>	<b>Agree</b>	<b>Strongly Agree</b>
B1	Inclusive Education should be a priority to be achieved by all schools	1	2	3	4
B2	Inclusive Education is of concern only for special needs schools	1	2	3	4
B3	Inclusive Education is reserved for specialised settings or classrooms	1	2	3	4
B4	Inclusive Education applies to all subjects	1	2	3	4
B5	Inclusive Education applies to specific curricula designed for specialised settings	1	2	3	4
B6	Inclusive Education applies to all teachers and all curricula	1	2	3	4
<b>Answer the following questions by encircling one option</b>					

B7	Inclusive Education, as required by Education White Paper 6 – <i>Special Needs Education: Building an Inclusive Education and Training System</i> , is aimed at addressing the needs of:	
	All learners	1
	Learners who experience barriers to learning in all classrooms	2
	Learners who experience barriers to learning in specialized settings (for example: Special classrooms)	3
	Learners with special needs in special schools	4
B8	In your opinion, should Inclusive Education be aimed at addressing the learning needs of:	
	All learners	1
	Learners who experience barriers to learning, within any classroom	2
	Learners who experience barriers to learning, but within a specialized settings (for example: Special classrooms)	3
	Learners with special needs in special schools	4

**SECTION C: Inclusive Education and pedagogical applicability: Knowledge**

- **Please consider the following questions related to Inclusive Education and pedagogical practice in terms of subject content knowledge. Encircle only ONE option.**

C1	In the everyday classroom, Inclusive Education applies to:	
	All subject fields	1
	Specific subject fields	2
	Specific content sections within relevant subject fields	3
	No subject fields outside of specialised settings	4



C2	The following classrooms should apply Inclusive Education as practice in the everyday classroom:				
	All classrooms	1			
	All classrooms should apply Inclusive Education, except for subjects dealing with 'hard facts' (for example: physical science, maths and life sciences)	2			
	Only the subjects that deal with personal life skills	3			
	Inclusive Education should only apply to specialised settings (for example: special curricula in special schools or classrooms)	4			
<b>Please answer the following questions by encircling one option</b>					
		<b>Strongly Disagree</b>	<b>Disagree</b>	<b>Agree</b>	<b>Strongly Agree</b>
C3	Pedagogical practices in all subject fields should be adapted to address individual learner needs	1	2	3	4
C4	Pedagogical practices in all subject fields should be adapted to address special learner needs	1	2	3	4
C5	The content knowledge of any subject field can be unpacked within an Inclusive Education framework	1	2	3	4
C6	The type of knowledge contained in a subject field determines whether Inclusive Education applies as practice	1	2	3	4

**SECTION D: Inclusive education and pedagogical applicability: Ethical requirement**

- Please consider the following questions related to Inclusive Education and pedagogical practice in terms of ethical requirements. Encircle only ONE option.

		Strongly Disagree	Disagree	Agree	Strongly Agree
D1	It is the responsibility of the teacher to adapt their pedagogical practices to address individual learner needs	1	2	3	4
D2	It is the responsibility of the teacher to adapt their teaching practices to ensure inclusivity	1	2	3	4
D3	It is the responsibility of the teacher to adapt their teaching practices to address the needs of all learners	1	2	3	4
D4	It is the responsibility of the teacher to use Inclusive Education as a framework for their teaching practice	1	2	3	4
D5	The responsibility of a teacher with regard to applying Inclusive Education as a pedagogical approach depends on the type of school they are employed at (for example a mainstream school, a full-service school or a special school)	1	2	3	4
D6	A teacher's responsibility with regard to applying Inclusive Education is dependent on the type of subject content knowledge being taught (for example fractions in math or general life skills)	1	2	3	4

**Thank for your participation and contribution to this study.**

#### **Annexure N: Recruitment letter to students**

Subject line: Invitation to participate in research - Inclusive education as ideology: a critical analysis of its pedagogical applicability

Dear 4<sup>th</sup> year BEd student of the North-West University, Vaal Triangle campus.

You are invited to participate in a research study in the coming week. The research involves the completion of an online, closed Likert scale questionnaire on pre-service teachers' understanding of the pedagogical applicability of Inclusive Education – with a specific focus on the understood theoretical applicability of Inclusive Education as an education policy pursuit, the epistemological applicability of Inclusive Education and the ethical applicability of Inclusive Education.

Your participation is entirely voluntary and you are free to decline to participate when the survey is shared. If you decline to participate, this will not affect you negatively in any way whatsoever.

(\*Important: Take note that the survey is hosted on an online platform that is not zero-data rated. Completing the survey will require data usage on the user's end. Depending on the nature of your internet connection, this may lead to data-related costs that will not be remunerated.)

**TITLE OF THE RESEARCH PROJECT:**

Inclusive education as ideology: a critical analysis of its pedagogical applicability.

**ETHICS APPLICATION NUMBER:**

**NWU-01619-19-A2**

Follow-up announcement:

Subject line: Invitation to participate in research - Inclusive education as ideology: a critical analysis of its pedagogical applicability

Dear 4<sup>th</sup> year BEd student of the North-West University, Vaal Triangle campus.

You are invited to participate in a research study advertised last week. The study is done via an online survey\*.

To participate, follow the link:

<https://www.questionpro.com/t/AQ5iyZiU96>

The research involves the completion of an online, closed Likert scale questionnaire on pre-service teachers' understanding of the pedagogical applicability of Inclusive Education – with a specific focus on the understood theoretical applicability of Inclusive Education as an education policy pursuit, the epistemological applicability of Inclusive Education and the ethical applicability of Inclusive Education.

Your participation is entirely voluntary and you are free to decline to participate. If you decline to participate, this will not affect you negatively in any way whatsoever.

(\*Important: Take note that the survey is hosted on an online platform that is not zero-data rated. Completing the survey will require data usage on the user's end. Depending on the nature of your internet connection, this may lead to data-related costs that will not be remunerated.)

**TITLE OF THE RESEARCH PROJECT:**

Inclusive education as ideology: a critical analysis of its pedagogical applicability.

**ETHICS APPLICATION NUMBER:**

**NWU-01619-19-A2**

Should you have any questions or concerns regarding this research project, you may direct your questions to:

**PROJECT SUPERVISOR:** Prof M Nel

**ADDRESS:** Building 22 Optentia House,

Vaal Triangle Campus

North-West University

Hendrik van Eck Blvd

Vanderbijlpark

1900

South Africa

**CONTACT NUMBER:** 016 910 3095

MEMBER OF PROJECT TEAM MEd-Student: Eddie Kok  
ADDRESS: Office 111C, Building 11B, Faculty of Education  
Vaal Triangle Campus  
North-West University  
Hendrik van Eck Blvd  
Vanderbijlpark  
1900  
South Africa  
CONTACT NUMBER: 016 910 3577

FACULTY OF EDUCATION RESEARCH ETHICS COMMITTEE

Contact person: Ms Erna Greyling, E-mail: Erna.Greyling@nwu.ac.za, Tel. (018) 299 4656

**Annexure O: Recruitment letter to lecturers**

Subject line: Invitation to participate in research - Inclusive education as ideology: a critical analysis of its pedagogical applicability

Dear colleague at the Faculty of Education of the North-West University, Vaal Triangle campus.

In the coming week you will receive an email with a link to an online survey\* as invitation to participate in a research study. The research involves the completion of a closed Likert scale questionnaire on pre-service teachers' and their lecturers' understanding of the pedagogical

applicability of Inclusive Education – with a specific focus on the understood theoretical applicability of Inclusive Education as an education policy pursuit, the epistemological applicability of Inclusive Education and the ethical applicability of Inclusive Education. Your participation is entirely voluntary and you are free to decline to participate when the email is received. If you decline to participate, this will not affect you negatively in any way whatsoever.

(\*Important: Take note that the survey is hosted on an online platform that is not zero-data rated. Completing the survey will require data usage on the user's end. Depending on the nature of your internet connection, this may lead to data-related costs that will not be remunerated.)

TITLE OF THE RESEARCH PROJECT:

Inclusive education as ideology: a critical analysis of its pedagogical applicability.

ETHICS APPLICATION NUMBER:

**NWU-01619-19-A2**

**Follow-up invitation:**

Subject line: Invitation to participate in research - Inclusive education as ideology: a critical analysis of its pedagogical applicability

Dear colleague at the Faculty of Education of the North-West University, Vaal Triangle campus.

You are invited to participate in the research study advertised last week. To participate you need to complete an online survey\*.

To participate, follow the link:

<https://www.questionpro.com/t/AQ5iyZiWmR>

The research involves the completion of a closed Likert scale questionnaire on pre-service teachers' and their lecturers' understanding of the pedagogical applicability of Inclusive Education – with a specific focus on the understood theoretical applicability of Inclusive Education as an education policy pursuit, the epistemological applicability of Inclusive Education and the ethical applicability of Inclusive Education.

Your participation is entirely voluntary and you are free to decline to participate. If you decline to participate, this will not affect you negatively in any way whatsoever.

(\*Important: Take note that the survey is hosted on an online platform that is not zero-data rated. Completing the survey will require data usage on the user's end. Depending on the nature of your internet connection, this may lead to data-related costs that will not be remunerated.)

TITLE OF THE RESEARCH PROJECT:

Inclusive education as ideology: a critical analysis of its pedagogical applicability.

ETHICS APPLICATION NUMBER:

**NWU-01619-19-A2**

Should you have any questions or concerns regarding this research project, you may direct your questions to:

PROJECT SUPERVISOR: Prof M Nel

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North-West University

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1900  
South Africa  
CONTACT NUMBER: 016 910 3095

MEMBER OF PROJECT TEAM MEd-Student: Eddie Kok  
ADDRESS: Office 111C, Building 11B, Faculty of Education  
Vaal Triangle Campus  
North-West University  
Hendrik van Eck Blvd  
Vanderbijlpark  
1900  
South Africa  
CONTACT NUMBER: 016 910 3577

FACULTY OF EDUCATION RESEARCH ETHICS COMMITTEE  
Contact person: Ms Erna Greyling, E-mail: Erna.Greyling@nwu.ac.za, Tel. (018) 299 4656

**Annexure P: Adjusted factor structure for survey**

## **Suggested amended factor structure for survey**

**SECTION B: Inclusive Education and policy**



Remove B2 – Concern implies responsibility therefore ethical duty

Remove B5 – although reference to policy, implication epistemic/curricula

**SECTION C: Inclusive Education and pedagogical applicability: Knowledge**

Refine and add B2

C3 and C4 flags duty. Although epistemic, clarity in terms of pedagogical practice would more clearly separate from duty – therefore ethics

**SECTION D: Inclusive education and pedagogical applicability: Ethical requirement**

Refine and add B5

D6 not clearly separate from epistemic query – either refine or add question to more comparatively distinguish (D7 that delineates responsibility clearly from epistemic query yet flags duty in terms of knowledge practices)

**Annexure Q1: Descriptive statistics – Descriptive Means, T-test results and Characteristic Frequencies**

**Table**

*Descriptive statistics, reliability coefficients, and correlations*

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Variable	M	SD	$\omega$
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Inclusive Education (IE) (scale: 1-4)				0,73
1. IE should be a priority to be achieved by all schools				0,52
2. IE is of concern only for special needs schools				0,50
3. IE is reserved for specialised settings/classrooms	3,61	0,70		0,40
4. IE applies to all subjects	1,79	0,75		0,78
5. IE applies to specific curricula designed for specialised settings	2,29	0,89		0,47
6. IE applies to all teachers and all curricula	3,52	0,65		
7. IE, as required by Education White Paper 6, is aimed at addressing the needs of: all learners, learners who experience barriers to learning in all classrooms or in specialised settings, or learners with special needs in special schools	2,36	0,76		
	3,58	0,53		
8. In your opinion, should IE be aimed at addressing the learning needs of: all learners, learners who experience barriers to learning in all classrooms or in specialised settings, or learners with special needs in special schools	1,23	0,24		
9. In the everyday classroom, IE applies to: all subject fields, specific subject fields, specific content sections within relevant subject fields, or no subject fields outside of specialised settings	1,26	0,50		
10. The following classrooms should apply IE as practice in the everyday classroom: all classrooms, all classrooms except for subjects dealing with "hard facts", only the subjects that deal with personal life skills, or only to specialised settings	1,20	0,38		
11. Pedagogical practices in all subject fields should be adapted to address individual learner needs				
12. Pedagogical practices in all subject fields should be adapted to address special learner needs	3,45	0,65		
13. The content knowledge of any subject field can be unpacked within an IE framework	3,29	0,55		
	3,39	0,40		
14. The type of knowledge contained in a subject field determines whether IE applies as practice It is the responsibility of the teacher to:	2,55	0,71		
15. adapt their pedagogical practices to address individual learner needs	3,33	0,50		
16. adapt their teaching practices to ensure inclusivity	3,52	0,44		
17. adapt their teaching practices to address the needs of all learners	3,44	0,50		0,52
18. use IE as a framework for their teaching practices	3,44	0,40		0,76
The responsibility of a teacher with regard to applying IE:				
19. as a pedagogical approach depends on the type of school they are employed at	2,62	0,73		
20. is dependent on the type of subject content knowledge being taught	2,50	0,78		

## Annexure Q2: Descriptive statistics – Descriptive Means, T-test results and Characteristic Frequencies

Independent t-test to compare 2 unrelated groups on the same items: Is there a significant difference between any of their means?

IEP7 (B7) Levene's test:  $F = 8.73$ ,  $p < 0.01$ , thus equal variances not assumed

t -test:  $t(52.63) = 2.71, p = 0.01$

t -statistic is positive, thus first group (students) has a significantly higher mean than the second group (lecturers)

$d = 0.20 [-0.35; 0.74]$

Cohen's  $d$ :  $0.20 - 0.50 = \text{small effect}$

Levene's test:  $F = 5.39, p = 0.02$ , thus equal variances not assumed  $t(35.12) = 2.06, p < 0.05$

t -test: t -statistic is positive, thus first group (students) has a significantly higher mean than the second group (lecturers)

$d = 0.50 [-0.05; 1.06]$

IEEth1 (D1) Cohen's  $d$ :  $0.50 - 0.80 = \text{medium effect}$

Levene's test:  $F = 1.51, p = 0.22$ , thus equal variances assumed

t -test:  $t(67) = 3.05, p < 0.01$

t -statistic is positive, thus first group (students) has a significantly higher mean

IEEth1 (D5) than the Cohen's  $d$ :  $d = 0.85 [-0.28; 1.42] > 0.80 = \text{large effect}$

### Annexure Q3: Descriptive statistics – Descriptive Means, T-test results and Characteristic Frequencies

#### Table

*Characteristics of the participants (n=100)*

Item	Category	Frequency Percentage
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Students	Specialisation phase	Foundation	6	9,7
		Intermediate	11	17,7
		Senior / FET	45	72,6
	Senior/FET specialisation subject	STEM	8	20,0
		Social sciences	12	30,0
		Languages	2	5,0
		Economic sciences	18	45,0
	IE addressed in number of modules	Only primary modules on IE	11	17,7
		Less than 5 modules	14	22,6
		5 and more modules	37	59,7
Lecturers	School within faculty	Language education	3	16,7
		Psycho-social education	4	22,2
		Professional studies in education	6	33,3
		Maths, science and technology education	3	16,7
		Commerce and social studies in education	2	11,1
	Years as lecturer in faculty	0-1 year	3	16,7
		2-4 years	8	44,4
		5+ years	7	38,9
	How often is IE addressed modules?	in At least once per term	1	5,6
		Several times per term	8	44,4
Only when required by the model		8	44,4	
Not applicable to my modules		1	5,6	

**Annexure R: Language Editor Certificate**

**Olivier Language Practitioner**

**Editing and Translation Service**

Date: 8 December 2021

Letter of confirmation of professional proofreading

Title: Inclusive education as ideology: a critical analysis of its pedagogical applicability

Author: Eddie Kok

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Editor: Willemien Olivier

*This paper was proofread*

*by*

*a proofreader*

#### LETTER OF CONFIRMATION OF ENGLISH EDITING

This is to confirm that the paper with the provisional title, Inclusive education as ideology: a critical analysis of its pedagogical applicability, to be submitted by Eddie Kok of North-West University, has been edited for language by Olivier Language Practitioner, Willemien Olivier. The document needed only a few amendments. Neither the research content nor the author's intentions were altered in any way during the editing process.

The editor guarantees the quality of English language in this paper, provided the editor's changes are accepted and further changes made to the paper are checked by the editor.

Willemien Olivier

Honours Degree Translation Studies (2017) UNISA

Editing and Translation Service: Olivier Language Practitioner since 2008

Proud member of Professional Editor's Group (PEG) since 2012

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#### **Annexure S: Translation of qualitative findings to quantitative items**

Qualitative findings summary for quantitative design:

- The role and extent of inclusive education according to policy;

- The role and extent of inclusive education in terms of epistemology, i.e. adjusted teaching practice and assessment;
- The ethical foundations of inclusive education and the responsibilities imbedded in inclusive education.

Quantitative items design:

	Item	Connection with qualitative findings / Reasons for item
The role and extent of inclusive education according to policy	IE should be a priority to be achieved by all schools	Policy prerequisite
	IE is of concern only for special needs schools	Qual finding – 1, 4, 5  Prevailing thought that IE should only be relevant to special needs schools. Ethical claim
	IE is reserved for specialised settings/classrooms	Qual finding – 1, 4, 5  Prevailing thought that IE should only be relevant to specialised settings
	IE applies to all subjects	Qual finding – 7, 8  Opposition in terms of limitation dependent on subject. Measure epistemological claims
	IE applies to specific curricula designed for specialised settings	Qual finding – 1, 4, 5  Prevailing thought that IE should only be relevant to specialised settings
	IE applies to all teachers and all curricula	Policy prerequisite
	IE, as required by Education White Paper 6, is aimed at addressing the needs of:	Qual finding – 7, 8  Opposition in terms of to whom IE applies – Ethical claim

	In your opinion, should IE be aimed at addressing the learning needs of:	Comparison – agree or disagree with policy. Divergent findings in qual phase.
The role and extent of inclusive education in terms of epistemology, i.e. adjusted teaching practice and assessment;	In the everyday classroom, IE applies to:	Qual finding – 4 – 7 Epistemic limits reported
	The following classrooms should apply IE as practice in the everyday classroom:	Qual finding – 4 – 7 Judgement on teaching appropriateness
	Pedagogical practices in all subject fields should be adapted to address individual learner needs	Policy prerequisite
	Pedagogical practices in all subject fields should be adapted to address special learner needs	Theoretical argument / policy prerequisite
	The content knowledge of any subject field can be unpacked within an IE framework	Qual finding – 4 – 7 Epistemic limits reported
	The type of knowledge contained in a subject field determines whether IE applies as practice	Qual finding – 4 – 7 Epistemic limits reported
The ethical foundations of inclusive education and the responsibilities imbedded in inclusive education.	It is the responsibility of the teacher to:	
	adapt their pedagogical practices to address individual learner needs	Qual finding 9 – 11 Inclusivity principle questioned / cost analysis (assumption that trade-off occurs)
	adapt their teaching practices to ensure inclusivity	Qual finding 9 – 11 Inclusivity principle questioned / cost analysis (assumption that trade-off occurs)



	adapt their teaching practices to address the needs of all learners	Qual finding 9 – 11 Duty questioned based on institution / limitations
	use IE as a framework for their teaching practices	Policy requirement
	The responsibility of a teacher with regard to applying IE:	
	as a pedagogical approach depends on the type of school they are employed at	Qual finding 4,5, 9 – 11 Duty questioned based on institution
	is dependent on the type of subject content knowledge being taught	Qual finding 7,8, 9 – 11 Duty questioned based on epistemic matters