

## 21. Disability and inequality in educational opportunities from a life course perspective

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### 1. INTRODUCTION: THE RELEVANCE OF DISABILITY, EDUCATION AND THE LIFE COURSE

Given the rising importance accorded to educational participation, performance and certification, why do some pupils - particularly those that participate in special education, supposedly compensatory - still leave school without certificates, face discrimination and challenging transitions from school to work, and have reduced life chances? This question reflects the fact that formal schooling shapes the life courses not only of the highly educated, as educational expectations have risen considerably, but for all young adults in 'school societies' (Baker 2014). A paradoxical consequence of these higher expectations is a growing proportion of pupils who, not performing in school adequately or quickly enough, are referred to special education programmes that signal pupils' considerable disadvantages before and in schooling, and presage school-leavers' reduced attainment and resultant life chances. As its diverse organizational forms developed over the twentieth century in many countries, special education offered assistance not only to children with recognized impairments, but increasingly also to those with a variety of newly defined 'special educational needs' (SEN), such as learning disabilities. Yet, with such support often provided in separate classrooms or other schools, their human right to inclusive education has been violated. This underscores persisting inequalities in accessing, and achievement and attainment within, general education. Despite progress, most students 'with SEN' in countries worldwide do not experience schooling 'without discrimination and on the basis of equal opportunity' (Article 24, UN CRPD 2006), the mandate of the UN Convention on the Rights of People with Disabilities (UN CRPD).

In fact, inclusive education has become a global norm, supported by the recognition of human rights, especially the right of education for all, embedded in a vision of democratic society bolstered by education systems that support the valuing of diversity in all its facets. Engaging pupil diversity to enhance learning is both an age-old and new challenging task for teachers in schools everywhere, as education for all becomes increasingly universal. Across Europe, significant variation in both the extent and quality of inclusive and special schooling reflects a range of institutionalized structures and cultures evident in the organizational settings and teaching practices within education systems (Powell 2006; European Commission 2017). Since the worldwide ratification of the UN CRPD (2006), which clearly defines the right to inclusive education (in Article 24) throughout the life course, all schools and education systems in Europe have faced the challenge of developing inclusive cultures, structures and practices (see Booth and Ainscow 2002). Further, the 2030 Agenda for Sustainable Development includes as Goal 4 to 'ensure inclusive and quality education for all and promote lifelong learning' (United Nations 2015).

Recognizing common and different understandings requires in-depth dialogue and benefits tremendously from joint exploration of varying schools, systems and cultural contexts (see Artiles et al. 2011). The recognition of and responses to educational and social disadvantages of students who 'have special educational needs' and 'become disabled' in schooling and/or upon transitioning to adulthood depend significantly on the institutionalization of the education system and social welfare programmes. When and when general exclusion of pupils with impairments has been overcome through the development of special education programmes, these programmes nevertheless frequently exhibit an overrepresentation of children living in poverty or in families with low socioeconomic status; boys and ethnic minorities; and children from migrant families from certain countries (Tomlinson 2017).

Within the field of educational research, sociological approaches to disability as well as to special and inclusive education emphasize such dimensions as exclusion/inclusion, segregation/integration, inequality/equality, institutionalization, stigma, learning opportunities, risk, and certification or credentials. Analyses of special and inclusive education contribute to our better understanding of (1) the categorical boundaries of disabilities and SEN among children and youth, which are connected to mainly clinical or medical conceptualizations of disability, and, with respect to educational opportunities and attainments, (2) the negative (often unanticipated or unintended) consequences of participation in special education programmes. Studies that connect educational attainment and social stratification and utilize a life course approach exemplify the strategy of connecting early inequities with life chances.

In this contribution, we review select classic and contemporary studies that discuss the nexus of educational disadvantage, special education and the life course. First, we briefly present data highlighting persistent disparities in rates of classification and participation across European education systems. Then we discuss three concepts – classification, life course and agency – that together facilitate a better understanding of the reduced educational opportunities of students with disabilities, and analyse the myriad paradoxes and ongoing ambivalence surrounding special and inclusive education. We conclude by proposing directions for conceptual and empirical work in this field.

## 2. COMPARING SPECIAL AND INCLUSIVE EDUCATION CROSS-NATIONALLY

Given the dominance of the clinical professions and medical models of disability that define disability and special educational needs mainly in terms of individual deficits, we might expect that rates of SEN would be roughly similar across advanced industrialized countries. Yet across Europe, the rates of all children classified as having SEN and receiving services vary considerably, from less than 1 per cent to nearly a fifth of all students (EASNIE 2017). These programmes serve a highly heterogeneous group of children with social, ethnic, linguistic, physical and intellectual disadvantages. While the group participating in special education includes children with similar disadvantages and disabilities in all countries, we find large differences not only in terms of the size of the group and its demographics, but also in terms of the learning opportunities provided.

The most recently reported harmonized data from the European Agency for Special Needs and Inclusive Education (EASNIE) show an extraordinary range of classification rates of pupils in special education (measured as the percentage of pupils with SEN of total school populations), from 0.5 per cent in Sweden to over 16 per cent in Iceland, but with a European average of just above 4 per cent (EASNIE 2017; Fig. 7). This contrast, which is shown in Figure 21.1 and is found even among the Nordic countries that are considered to have some of the most inclusive education systems worldwide, is remarkable in highlighting contrasting ideas relating to classification, varying definitions and categories, and unequal distribution of learning opportunities (see Powell [2011] 2016; Biermann and Powell 2014). Across countries, the necessity of being diagnosed, often a condition for receiving additional support, differs very widely – and this demands attention to the dilemma of balancing the positive provision of resources and the negative consequences of labelling that are prevalent throughout education systems. In most countries, classification remains a prerequisite to receiving individualized support and services (a topic we return to below). In many countries – both larger and smaller, richer and poorer – we find persistent educational and social disadvantages suffered especially by children and youth with impairments and disabilities, but also by those in need of support to achieve set learning goals; these groups are not coterminous (see e.g. Richardson and Powell 2011).

Among the major barriers to inclusive schooling are expanded and highly differentiated systems of segregated special schools or separate classrooms. Comparing the proportion of pupils in segregated settings as a percentage of the total pupil population across European countries again reveals a considerable range. We find almost no school segregation in the Nordic and some Southern European countries (such as Italy and Spain). The proportion of children in segregated schools and separate classes varies between almost none in Italy to over 7 per cent in Belgium, with a European mean of just over 2 per cent (EASNIE 2017; Fig. 12). Throughout Europe, countries have developed different constellations of support services and organizational forms to provide for children with disabilities or pupils with learning difficulties and those that suffer myriad disadvantages and discrimination.

Despite global normative pressures, there has been limited global convergence in special and inclusive education over the past decades (Richardson and Powell 2011), even among those countries that have committed themselves to inclusive education via ratification of the UN CRPD (e.g. Biermann 2018). Thus, inclusive education reforms must explicitly address the varying institutionalization of special (needs) education if these reform processes are to succeed. Especially in Germany and its continental European neighbours, in which the proportion of pupils attending special schools is particularly high, the goal of inclusive education is challenging. But even among those countries with longer traditions of school integration and inclusive education, global norms are putting pressure on policymakers and school decision makers. The stark differences across and within European countries are visible in all the indicators provided by EASNIE, whether the proportion of schooled pupils officially classified as having SEN (classification rate) (Figure 21.1); the proportion of schooled pupils officially classified as having SEN in 'inclusive settings' (Figure 21.2); or the proportion of schooled pupils officially classified as having SEN that remain segregated in special schools (Figure 21.3).

The first indicator, classification rate, was calculated on the basis of the number of pupils officially classified as 'having SEN' as a proportion of all enrolled pupils. The

Figure 21.2 Proportion of schooled pupils officially classified as 'having SEN', in 'inclusive settings' (2014)

Source: EASNIE (2017, Figure 12).

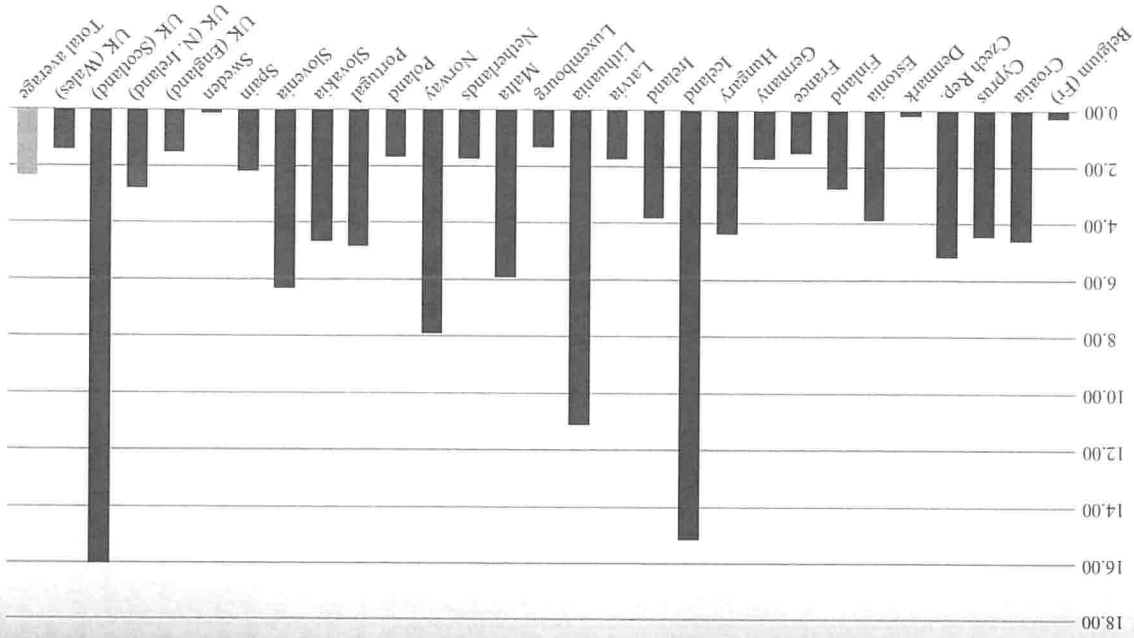
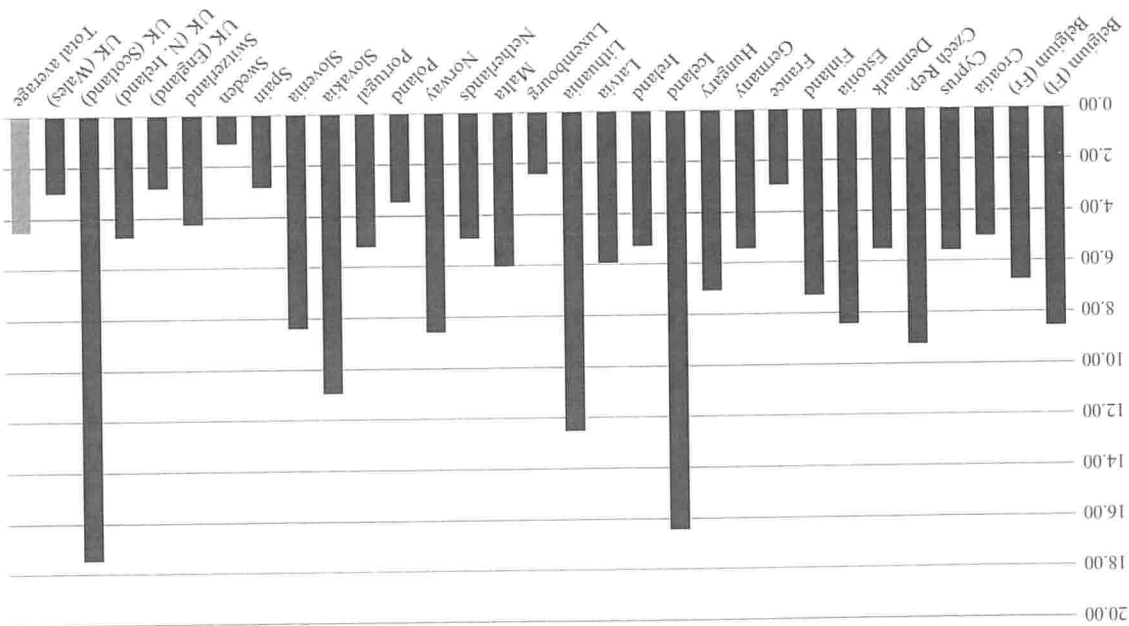


Figure 21.1 Proportion of schooled pupils officially classified as 'having SEN' (classification rate) (2014)

Source: EASNIE (2017, Figure 7).



enormous range among these 30 countries in Europe spreads from 1.1 per cent to 17.5 per cent, with the mean being under 4.5 per cent. For example, while Germany at around 6 per cent is somewhat higher than the mean, there are other countries with very different classification systems and categories as well as mechanisms, especially funding rules, that have much higher rates, such as Iceland (16.4 per cent), Lithuania (12.5 per cent) or Scotland (17.5 per cent). Here, the 'resource-labelling dilemma' (Füssel and Kretschmann 1993) suggests that the additional resources of special education must always be balanced out with the negative consequences of labelling and potential stigmatization. Despite the diffusion of the global norm of inclusive education, signified clearly by the worldwide ratification of the UN CRPD, binary systems, such as those in Belgium and Germany, have largely maintained the split between regular and special schools. By contrast, many national education systems have reformed their systems such that there is a 'continuum' of offered settings to support learning (see EADSNE 2011; EASNIE 2017). The German-speaking countries are moving in this direction, even if, as elsewhere, there is loose coupling between the rhetoric of reforms and the school realities found. This is evident in the spread of classified pupils that attend 'inclusive settings' (see Figure 21.2).

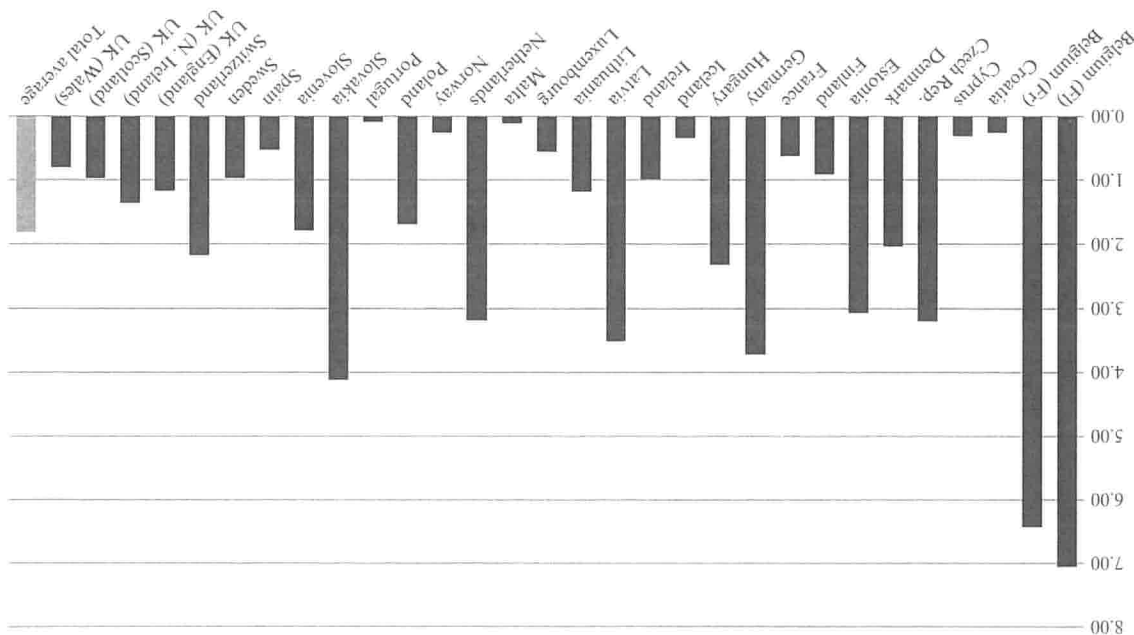
This indicator represents the proportion of officially classified pupils in settings formally considered inclusive of all pupils, that is, those spending at least 80 per cent of the school day with their non-classified peers. This indicator also evidences massive disparities among 28 countries in Europe, from 0.14 per cent to 16 per cent, with a mean of 2.4 per cent. For example, Germany is just below that at 2 per cent. Many countries that have higher classification rates also have more inclusively educated pupils. Of course, such a spatial indicator of participation in a particular setting cannot measure the quality of instruction or the effects of didactics. However, the variance does evidence that there are countries that succeed in schooling most pupils 'with SEN' inclusively, while others remain very far away from realizing this global norm.

Thus, below, we discuss the classification of SEN and the institutionalization of special education, which have very different consequences, even among the most inclusive systems in the Nordic countries of Denmark, Finland, Iceland, Norway and Sweden (e.g. Biermann and Powell 2014) or the different countries of the UK (Tomlinson 2017). Especially given the human right to inclusive education and the rapid diffusion of the discourse of 'inclusive' education, albeit with much more gradual changes in the policies, structures and cultures of education systems, further indicators are needed to analyse the persistence of school segregation in the face of global discursive shifts affirming culturally specific notions of inclusion (e.g. Biermann 2018). Incompatible with the human right to inclusive education, school segregation (see Figure 21.3) continues to lead – even among the lowest school types – to lower educational achievement and further disadvantage in transitions from school to work in such countries as Germany (e.g. Blanck 2019).

This third indicator shows the proportion of officially classified pupils as a percentage of the entire school population who attend special schools – in 30 European countries. The implied spatial segregation is the strongest indicator of educational disadvantage. It also manifests considerable variation, from 0.09 per cent to 7 per cent, with a mean of 1.8 per cent. These data prove that all countries that provide data on pupils 'with SEN' also have some form of special schooling, yet the proportion differs starkly between countries. After Belgium's Flemish and French-speaking communities (with over 6 per cent) and Slovakia (over 4 per cent), Germany and Latvia have special schooling rates of over

Figure 21.3 Proportion of schooled pupils officially classified as 'having SEN' segregated in special schools (2014)

Source: EASNIE (2017, Figure 18).



3.5 per cent. The countries with the lowest special schooling rates are Malta, Portugal, Croatia, Norway, Cyprus and Iceland.

International and intranational comparisons emphasize that education systems develop in path-dependent ways, with various barriers and facilitators, such as acknowledging and realizing the human right to inclusive education (see Blanck et al. 2013). Comparative studies of the development of inclusive education frequently refer to the policy recommendations of international organizations and of other countries, in particular those like Iceland, Norway and Canada that since the 1990s have further developed their systems' inclusiveness (see e.g. Köpfer 2013; Kiuppis and Peters 2014; Sigurðardóttir et al. 2014). To understand the barriers to inclusion and how to overcome them, we must analyse the institutionalization of segregated and separate school settings as well as the drivers behind the gradual convergence to the 'continuum' of educational settings (see Powell [2011] 2016). The myriad negative consequences of lessened learning opportunities and of stigmatization for individuals and societies alike demand enhanced critical reflection. For this purpose, we next delve into life course scholarship.

### 3. LIFE COURSE SOCIOLOGY, SCHOOLING AND DISABILITY

Life course sociology emphasizes modern nation-states' increased institutionalization of 'individuals' life courses as it exemplifies needs and risks addressed by authorized professionals in legitimate organizations (Mayer 1991, 1997). Here, special education is examined as a paradigmatic case of such institutionalization. Youth in special education have been considered 'at risk' for well over a century (Powell 2006; Richardson and Powell 2011; for Germany Pfahl 2011). Although educational expansion facilitated affirmation of the goal of schooling for all school-age children, growing diversity led to increased differentiation and standardization as attempts to resolve tensions between expanded access and organizational constraints: the rules of 'access' and of 'passage' govern the exemption of those deemed 'ineducable' or 'disabled' (Richardson 1999). Informed by disciplinary knowledge, classification systems and groupings or tracks based on 'ability' were organizational, pedagogic and political responses to increasing diversity. The institutionalization – regulative, but often residential as well – of these individuals' life courses had been steady, until advocates of 'normalization' and 'de-institutionalization' challenged this status quo in recent decades (Braddock and Parish 2001). Despite massive general educational expansion and the disability movement's successful activism for increased access to (integrated; later: inclusive) schooling, more than ever before, being 'disabled' is linked to being less educated than one's peers. Conversely, being less educated leads to a risk of becoming disabled, experiencing poverty and suffering social exclusion (OECD 1999, 2007).

Life course research, in referring to a 'sequence of socially defined events and roles that the individual enacts over time', derives its advantage from 'its flexibility and capacity to encompass many different types of cultural, social, and individual variation' (Giele and Elder 1998, p. 22). Other concepts such as age and generation, transitions, trajectories and pathways are also highly relevant for the growing multidisciplinary field of disability studies, as they enhance the study of the interactions between social structures and individual lives (e.g. Priestley 2001). Life course research focuses on the considerable consequences

of institutional arrangements for life course trajectories varying across time and place. It contributes to our understanding of disablement by acknowledging longitudinal changes in social relations, everyday knowledge and academic concepts. As each cohort develops particular meanings of illnesses, impairments and disabilities, generational aspects allow us to analyse changes, but also continuities, in disabling policies, institutions and environments.

Those children with impairments early in life – or difficulties in meeting schools' normative learning and behavioural requirements – are selected out as they are identified. But what counts depends on national and regional educational policy and on local school classificatory practices. As shown above in aggregate nation-level figures, participation rates in special and inclusive education also vary considerably across space and between disability or SEN categories. Not only funding, but also population density, cohort size and other demographic factors, influence which pupils are most likely to be identified, classified and often removed from the regular classroom and how (special) education resources are distributed. Comparative studies, both international (e.g. Powell [2011] 2016; Biermann and Powell 2016) and intranational (e.g. Blanck et al. 2013; Blanck 2019), emphasize that students' transitions into special education often have much to do with institutional and organizational conditions, independent of individual characteristics, although the latter are erroneously most often viewed as the causal factors.

A life course approach, however, emphasizes that learning difficulties and capabilities develop over time, as pupils' past dis/advantages accumulate; therefore, educational systems in which schooling begins later, and those that sort pupils earlier, place greater emphasis on family resources and socialization, and may be less forgiving of developmental delays. Results of PISA (Programme for International Student Assessment) and other international large-scale assessments show that in few other Organisation for Economic Co-operation and Development (OECD) countries' education systems is the relationship between socioeconomic status and achievement as strong, or social status reproduced intergenerationally as consistently, as in Germany's (OECD 2013). This is due to its early selection and rigid secondary school stratification, which led, isomorphically, to the development of one of the most differentiated special school systems in the world (Powell [2011] 2016).

To analyse inequality in educational opportunities, including for pupils with disabilities, timing is a major factor, as transitions between school types and grades often provide the moment in which education policy and school gatekeepers' decision-making jointly determine a pupil's future educational opportunities. He or she will be sorted into a location within or between stratified schools. In the former, tracking occurs throughout a pupil's career but within an integrated comprehensive school; in the latter, children are sorted into differentiated pathways and school types, especially during the early transition between primary and secondary school (after grade 4). Because there are limited preferred locations and there is mostly downward mobility, most children will not benefit from the best possible learning opportunities. Once in special education, a pupil's further learning is determined in large measure by the attainable degrees, curriculum, interactions with classmates and teachers, and services provided in the school, track or classroom. At the micro-level, individual life course studies use biographies to emphasize students' personal agency, illuminating interpersonal connections and children's specific experiential worlds in school (see Pfahl 2011, 2012).

Institutional life course research, by contrast, focuses on regularities and patterns in these individual consequences by analysing location-specific and time-specific structures, such as policies and institutional arrangements (see Powell [2011] 2016). Extraordinary shifts in how societies treat people classified as disabled, often within just a few years or decades, highlight the importance of emphasizing the dialectical exchange of social structures and individual lives (Riley 1989): of individuals' life courses embedded in and shaped by historical times and places (Elder 2001, p. 8820). As especially scholars in the subfield of disability studies in education aim to make sense of the complex relationships between disabled people's experiences and the opportunity structures and constraints of barrier-filled contexts (e.g. Baglieri et al. 2010), they can profitably use life course concepts to gauge those changes. To do so, however, requires attention to groups and their dynamic boundaries. For historical periods and cultural contexts, social scientists must analyse how disability is defined, who defines it, in what contexts, and with what consequences (Barton 1998; Albrecht 2017). Children and youth in special education may benefit from substantial resources, services and individualized attention. At the same time they face organizational or legal constraints on educational attainment.

Life course research has focused on rules and preferences in organizations and their legitimization of personhood and standardized, institutionalized life courses (Kohli 1985). Contemporary welfare states categorize individuals at each stage of the life course, determining not only economic and social well-being, but also which differences matter and which are preferred or stigmatized. Indeed, the linkages between well-being and inclusion are increasingly explicitly studied (see e.g. contributions in Rathmann and Hurrelmann 2018; Powell and Hadjar 2018 on Germany, Luxembourg and Switzerland). The bureaucratic state legalizes and standardizes using multiple mechanisms including legal norms, entitlement criteria, professional licensing, and incentive distribution, all of which can have large unintended effects (Mayer 1991, p. 182). The number of years of compulsory schooling; psychological and medical eligibility criteria for special education services; professionalization of school psychology, rehabilitation and related fields; and financial incentives to label children are all areas in which state standards and bureaucratic regulations influence individual pupils' careers in (special) education (Blanck et al. 2013). From this perspective, schools emphasize and institutionalize the differences between children as they sort and classify. These differences need not, but often do, produce prejudice, negative stereotypes, and discrimination among student groups, as each cohort is socialized in more or less enabling or disabling schools and families (Pfahli 2011).

#### 4. EDUCATION SYSTEM STRATIFICATION: SCHOOL TRACKING AND SCHOOL SEGREGATION

Like other tracks between or within schools, special education has gatekeepers who utilize standardized measures of academic performance and behavioural norms to select diverse pupils' bodies into supposedly homogeneous groups at status passages, especially to legitimate selection processes between grades or school types. Stratification research repeatedly demonstrates the impact of education systems on pupils sorted at early ages into pathways through schooling that differ in their access to later educational and employment opportunities (see contributions in Hadjar and Gross 2016).

Mobility within social structure determines individuals' successes and failures, while 'modes of access to positions in social structure (...) determine how individual efforts and abilities become linked to social and economic rewards', affecting individual beliefs about the relationship between personal efforts and achievements (Sorensen et al. 1986, p. 178). Education not only determines societal patterns of economic and political allocation, but also legitimates such patterns. School systems distribute each cohort of children into a society's adult stratification system. Despite some acknowledgment of 'ability' as a key construct in the determination of structural location (Kerckhoff 1993, pp. 15–16), until recently most research largely failed to address children and youth in special education or those 'with SEN'. This is unfortunate, because special education students' life courses demonstrate how life chances are influenced and determined from the very beginning by educational policies and school systems as well as by gatekeeping professionals (see e.g. Skritic 1995; Tomlinson 2017).

Applying school stratification arguments to special education structures, they (1) socialize into the lowest levels of educational hierarchies, (2) allocate into categories with lower attainment probabilities, and (3) legitimize inequalities, especially through medical model classification systems and professionalized, bureaucratic special education programmes that usually separate or segregate classified students. For decades 'disability' has been largely excluded from sociological research on social stratification (but see Jenkins 1991; Entwisle et al. 1997); likewise, special education was rarely included in the early tracking literature, even though its analytical foci are the outcomes of the hierarchical organizational structures of schooling and curriculum differentiation. Important longitudinal studies in some countries have provided crucial data on transitions within and beyond schooling (e.g. US: NLTCS 2012, NLTSS 2018; Germany: NEPS 2012). Contemporary studies, on the basis of longitudinal panel surveys, are now appearing that explicitly investigate primary and secondary effects and disability (see e.g. Blanck 2019 for Germany; Chatzitheochari and Platt 2019 for the UK). In relation to educational success, such research provides representative evidence for the well-known fact that pupils with learning difficulties make more progress in achieving standardized educational norms in regular schools than when schooled in separated or segregated environments, for example in Germany (Kocaj et al. 2014).

While empirical analyses often ignored the environmental opportunities that shape and constrain student (and parental) choices about schooling (Allmendinger 1989, p. 231), tracking research has shown how processes of differentiation distribute children into learning opportunity structures. Primary and secondary schools continue to implement tension-laden curricular assignments (Loveless 1999), despite reductions following challenges to increase equality of educational opportunity (Lucas 1999). Elementary schools sort students in three ways – being held back, being placed in special education, and being grouped for instruction by administrative decision. These in-school tracks are more difficult to analyse precisely because they are 'so far below the level of social consciousness that they are not even thought of as tracks' (Entwisle et al. 1997, p. 80). That has been changing, not least due to the global attention that the UN CRPD and the Millennium Development Goals – including Goal 2 to achieve universal primary education and Goal 4 quality education (United Nations 2015) – have brought to issues of inclusion and equality.

Researchers argue for a focus on children at very early ages, because 'rigid social stratification begins when children start their formal schooling, or even before, yet much

of the social sorting at this point in life is overlooked' (Entwisle et al. 1997, p. 4). Their classical longitudinal 'Beginning School Study' found that boys, minority group members and poor children are more likely to fail a grade or be placed in special education classes in elementary school; findings echoed in most countries (Richardson and Powell 2011). Commonalities exist between processes of educational allocation and selection for students of lower social class backgrounds and students classified as disabled, especially in the ubiquitous but culturally specific category 'learning disability' that, more than anything else, reflects class position (Carrier 1986; Pfahl 2011, 2012; Tomlinson 2017). Decades of research findings also show the often-dramatic overrepresentation of boys and racial and ethnic minority groups in special education (e.g. Losen and Orfield 2002; Powell and Wagner 2014; Tomlinson 2017).

In sum, tracking does not promote the development of quality schooling, but instead restricts low-track students' academic achievement, produces negative expectations among their teachers, and hinders development of their self-concepts and self-efficacy (Ansalone 2001). Mobility out of special education is also limited, due in part to the self-fulfilling prophecy of low expectations begetting low achievement in low-status tracks. Thus, 'it is hard to overrate the importance of helping youngsters avoid being held back or placed in Special Education because avoiding these placements makes a tremendous difference in their long-term life chances – more of them will continue in school, and not drop out (. . .)' (Entwisle et al. 1997, p. 18).

What are the mechanisms that regulate students' transition into low-status schools or tracks? How is the resulting stigmatization and institutionalized discrimination legitimated? The next section reviews functions of classification systems and asks why devalued categories and their corresponding tracks continue to be used, before turning to specific implications, psychological, social and occupational, of participating in such special education settings.

## 5. CLASSIFICATION(S) OF SPECIAL EDUCATIONAL NEEDS

Educational classification systems, interacting with locational, cohort-specific, and generational notions of dis/ability and behavioural norms, provide school gatekeepers with the categories they use to make sorting decisions about individuals' educational pathways. Professionals construct what it means to be 'disabled' or 'have SEN' in a given school (using official categorical policy distinctions but modified in everyday interactions). Labelled students in each cohort construct their own meanings, reinterpreting the given categories (Hacking 1999), yet the resulting boundaries and separations affect not only growing identities but also life course trajectories. As the social mechanism that links ideologies of 'ab/normality' and beliefs about 'dis/ability' with educational policies and school practices, classification systems institutionalize the meanings, labels and categories that establish social boundaries between groups, constructing but also legitimating unequal educational opportunities (see Powell 2006; Pfahl and Powell 2011, 2016).

While definitions of disability have been continuously revised (most recently due to the UN CRPD), the overarching categories and processes of classification resist change. Similar to other Western bureaucratic administrations run by professional gatekeepers, special education and its classification systems – based on the idea of 'normalcy' derived

from statistical science (Davis 1997) – developed at the nexus of the modern social sciences, industrializing nation-states and social policies (Rueschemeyer and Skocpol 1996, p. 310). In contrast to abundant good intentions and compensatory investments in special education settings – authorized to offer specific educational opportunities – seem to reduce individual access to opportunities to learn without being questioned they are largely taken-for-granted. These reduced opportunities, in combination with regulatory limits on certification, may reduce educational opportunities and attainment. Individuals' risk of low (or no) attainment increases in special education, with its students significantly overrepresented in the group of less-educated youth (Powell 2006; Tomlinson 2017). Ironically, educational expansion has *increased* stigmatization of less-educated youth because they constitute the lowest educational category – that has become smaller and more socially selective over time – while ever more of their peers have earned certificates (Solga 2002, p. 164). Indeed, not only does education influence political and economic allocation, but also having credentials has become more important for individuals to be defined as full societal members. Education is a global human right that states must provide, and everyone has the responsibility to support this movement towards universal education. Responding to these principles, governments and non-governmental organizations around the world have committed themselves to 'education for all' – and, over the past decade, also to inclusive education (e.g. Biermann 2018). Analysing existing SEN classifications or students' educational opportunities requires analytic attention to the relationships between individuals embedded in social situations but also to cultural contexts, disciplinary perspectives and translations of concepts into empirical measures that guide classification processes. Educational administrations distinguish pupils' disabilities and regulate access to special educational services and settings according to culturally specific social norms and professional practices: 'Far from being "scientific facts" based on objective, universally understood definitions of difference, the categories and labels assigned in different societies are contingent, temporary, and subjective' (Barton and Armstrong 2001, p. 696). The example of the German discourse on 'learning disabilities' presented below provides further evidence to support that claim (Pfahl 2011).

## 6. THE SOCIAL CONSTRUCTION OF 'LEARNING DISABILITIES'

Within Western societies since the mid-1800s, compulsory schooling laws have expanded to encompass ever more diverse groups of children, including those of low socioeconomic status, migrants, and those with impairments (Richardson and Powell 2011). Increasing standardization and differentiation of school systems were the main responses to the challenge diverse student bodies represented, and a variety of sorting mechanisms resulted in age-graded schools defining the early life courses of children and youth in a rigid series of stages. Especially during these transitions within and between schools, 'special educational needs' (SEN) began to be identified, labelled and reified – altering a classified pupil's educational pathway, occupational trajectory and life chances. Examining the conflict between global intentions and national persistence, we analyse the institutionalization of special education for children and youth from lower classes and a migrant

background in Germany. Charting the German discourse on 'learning disabilities' provides insights into special education's developmental path that contributes to the maintenance of school segregation throughout educational systems in the *Länder*. Here, we focus on the learning disability discourse and knowledge, the special education profession, and the expansion of its main school type, the so-called support school (*Hilfsschule*), from around 1900 to today. The aim is to demonstrate how knowledge, institutional arrangements and practitioner strategies intersect in a process that constructs 'learning disability' as a seemingly objective reality that stabilizes the status quo of segregated special schooling. This perspective sheds light on the knowledge and strong influence of gatekeepers, as we analyse professional discourses to understand how the classification was elaborated in one of the countries that pioneered special education.

In Germany, learning disability (*Lernbehinderung*) has risen to become the largest category of special educational support over the twentieth century. Yet the significance of this category rests not only in quantitative prevalence but also in its status as an ideal-typical 'disabled subject' resulting from participation in a highly inegalitarian stratified and segregated education system (Pfahl 2011, 2012; Pfahl and Powell 2011). As a school-based category that only exists in the relationship of individual pupils to socially derived educational standards and behavioural norms, it is a relative status. Without a clear aetiology, this category is based on a range of genetic, biological and social factors (Hänsel 2005; Pfahl and Powell 2011). Yet in Germany, it has been closely related to, but more specific than, general notions of educational and social disadvantage. This category has long been school professionals' most official and authoritative way of indicating and responding to poverty, migration and social disadvantage and their negative consequences for learning. This has legitimized not only specific supports but also the selection out of general schools and into the segregated special school system.

Although the debate about school integration and segregation has been a continuous feature of special education discourse, the path taken towards full-time school segregation began with the establishment of the organizationally autonomous *Hilfsschule*. This developmental path – with self-reinforcing feedback typical of school organizational forms once established – continues to the present day (Powell [2011] 2016). Here, we argue that the tenacity of this school segregation relies on the professional power that developed on the basis of special education knowledge and discourses, which called for the organizational form of the special school to address student body heterogeneity and low individual school performance. The resulting *Hilfsschule* then became the model upon which the subsequent special school expansion, especially from the 1960s onwards, was based. Below, we distinguish three crucial phases of the development as a process of strategic professional interests.

The first phase began after the establishment of compulsory education and at the start of a century of dramatic educational expansion at the end of the nineteenth century. Teachers interested in social equality began to teach children from the strata of migrant workers and the *Lumpenproletariat*, which remained excluded from the modernized education system of the Prussian monarchy. Growing beyond single organizations serving pupils with perceived impairments, special classes and schools were founded and the profession established itself nationwide at the turn of the twentieth century. In the second phase, during and after the post-World War II expansion, the profession succeeded in expanding university departments nationwide, focused on teaching education more

than research. Accordingly, the number of special education schools exploded tenfold in the 1960s. At the same time, the national classification of special educational need was differentiated and segregated special schooling was supplemented with a system of special vocational training. This was meant to organize the transition of special school leavers into a segregated and highly subsidized labour market, including vocational programmes and workshop settings. In the third phase, from the 1980s onwards, a debate about integration and segregation was renewed from earlier in the century. While parent and politicians continuously engaged in this conflict, a strong and entrenched scientific discourse, supported by the professionals with their vested interests and drawing on both the ideology of innate ability and clinical thinking, dominated public discourse on student disabilities. The field of special education further expanded into the field of rehabilitation (*Rehabilitationswissenschaften*). Here too, the academic development, research specialization and department chairs were built along the existing school types. Teachers, largely through their influential professional associations, succeeded in exerting influence on politics and public administration and effectively articulated their interests in educating disabled pupils almost exclusively in segregated schools. In Germany, the profession and its segregated schooling organizations establish a parallel world that insulates it from representatives from criticism, which they often perceive as an external threat to their objective and subjective interests and their professional identity. This construction of special education is an articulation of the nineteenth century idea of a particular societal distribution of innate talent that demands the 'protection' of the most disadvantaged pupils not only from the insults and dangers of capitalist society but also from themselves at the same time, school segregation is seen as 'protecting society' from supposedly dangerous underprivileged individuals (see Hänsel 2005; Pfahl 2011).

The special education profession in Germany nevertheless exhibits remarkable historical continuity, as does general education, which resisted 'inclusive education', with the German Educational Research Association (DGfE) not establishing a commission to write a position paper on the topic until 2015. Attempts to uncover the contributions of special education to the Nazi-era euthanasia programme have been challenged by the profession (Hänsel 2014). First, professional perspectives understand pupils as needy but also as 'deviant', despite changes in categorical labels – from individual impairments before the 1950s to school types during the special expansion to pedagogical support categories since 1994. A further change on the surface has been the renaming of the professional association from that of support or special schools to the Special Education Association (*Verband deutscher Sonderpädagogik*). Despite such discursive shifts, however, and of considerable consequence for life chances, the treatment of pupils classified in the learning disability category continues to build on segregation as the main 'treatment' response. Thus, despite considerable local successes, in many regions of Germany only a minority of pupils with SEN attend inclusive schools. The profession of special education – and the more specific case of learning disability – has from the beginning based its authority on a specific school form, an organizational solution. This model was copied from German general education, namely the multi-tiered secondary school system. The general and special schools share a common vision of the pedagogical necessity of gathering pupils into supposedly homogeneous groups according to 'innate' abilities, however defined by the education profession's contemporary knowledge base.



## 7. PUPIL AGENCY AND TRANSITIONS TO VOCATIONAL TRAINING AND WORK

As we have shown, the social construction of special needs education is a scientific articulation of the nineteenth-century idea of protecting the lower classes from the insults and dangers of capitalist society, protecting lower class students from themselves, and protecting society from underprivileged individuals who may be dangerous to the social order. The professional construction of learning disabilities focuses on 'healing individual cognitive deficits' of students who attend segregated schools. However, segregated educational environments, viewed by educators as providing special support by offering a 'protective, comforting space' (*Schonraum*), effectively limit the educational attainment and personal development of their pupils. Additionally, the incorporation of the scientific discourse elements of 'physical 'incompleteness' and 'disruption' shapes the biographical selves of youth, such that they remain in purportedly 'safe territories'. Yet these restrain and constrict their opportunities for participation and inclusion. Such spaces can be interpreted as an attempt to protect pupils by placing them in a social territory situated outside of visible power relations and the competitiveness of capitalist labour markets. This attempt is deeply paradoxical, especially in a situation in which unskilled labour is increasingly excluded from most kinds of meaningful or remunerated employment. Not only are these school leavers released into the labour market with a lack of formal credentials (Solga 2002), but, as we have shown, after years spent in a stigmatized school form these youth tend to reduce their self-expectations to such degrees that they feel unable to participate in official forms of employment (Pfahl 2011, 2012). The German *Sonderschule* equips its clients with a *Sonderschüler* identity, in line with the general objectification and division of educational identities within the stratified educational system that reproduces class boundaries. Theoretically, we distinguish two mechanisms: (1) pupils are subjectivated through the education system's hierarchical structure that limits their educational opportunities and success and allocates them to (very) low social and occupational positions; (2) the segregation of pupils with learning disabilities stigmatizes (Goffman 1963) them as 'disabled', as it simultaneously shields persons – via unequal educational opportunities in which they are socialized – from having to meet educational standards and societal expectations. Especially in transitions beyond secondary schooling such disabled youth face barriers to vocational training and the labour market that are most challenging to surmount.

To understand the situation of disabled youth transitioning from school to work, it is necessary to take a look at the structuring of tertiary education in Germany. As the multi-tiered school system is strongly connected to the system of vocational training, it is very difficult for special school leavers to get any access to valuable vocational training (Pfahl 2012; Blanck 2019). Instead of being integrated into the labour market, many special school leavers attend additional years of schooling within support programmes for disadvantaged youth (in German: *Benachteiligtenförderung*). Despite the fact that the training does not qualify them for the labour market, many young grown-ups attend two or more years within the *Benachteiligtenförderung* and most ultimately do not succeed in vocational training (Blanck 2019). The professional construction of learning disabilities focuses on 'healing individual intellectual deficits' of pupils. Segregated educational environments, viewed by professionals as providing special support by offering a 'comfort-

ing space' or 'safe territory' (*Schonraum*), effectively cap the educational attainment and personal development of their pupils, yet the programmes' legitimacy is maintained by discourse that bolsters and reaffirms learning disabilities as an individual deficit instead of as the result of disadvantage and 'institutionalized discrimination' (Gomolla and Radtke 2002).

In practice, classification is the main educational sorting mechanism that school gatekeepers use to identify children for assessment and the rationale that legitimizes segregation in 'special' vocational trainings and pseudo-labour markets (Pfahl and Powell 2011). The category of learning disability and its school form lies at the nexus of their educational and vocational opportunities. Despite the fact that segregated schooling generally hinders the attainment of even the lowest formal qualifications, the special education and rehabilitation discourse legitimates the ongoing segregation of this disadvantaged group of pupils. What consequences does segregated schooling have on pupils in terms of their identities? Having clarified the construction of 'learning disability' and the phenomenon of school segregation, we will analyse the labelling of individuals in this category. The structures and practices of segregated schooling produce subjectivities that inhibit learning processes and educational success. As demonstrated, social inequalities are reproduced by student selection and segregation through knowledge about disabilities based on clinical professional ideology and the practice of segregation itself. At individual level, segregated schooling fails to support students' development of agency; in fact, it further disables them (Pfahl 2011, 2012).

## 8. DISABLING CLASSIFICATIONS: LABELS, STIGMA AND LIFE COURSE CONSEQUENCES

Elaborated classification systems bear witness to the rise of professional dominance in many societies. Most often, classifications of people with illnesses and impairments and disabled people rely on judgements based on the clinical, but nevertheless subjective, reasoning of medical doctors, psychologists and other trained professionals (Albrecht 1992). These systems, used to control status passages, borrow medicine's metaphors and methods, but also its enormous cultural legitimacy (Stone 1991). They operate with a model of clinical judgement and treatment that emphasizes individual assessment, diagnosis and placement (Biklen 1988, p. 129). Furthermore, the disparities between expert gatekeepers' ideology and self-presentation and their actual practices are often significant, as they sort people into fixed status categories they themselves define in their professions' theoretical constructions (Stone 1991, p. 218). Boundaries between categories in systematic classifications are policy choices with clear ramifications, just as the classifying of people among them represents a political process that must be empirically examined (Starr 1992).

When students are categorized based on teachers' evaluation of individual competence or abilities via a plethora of diagnostics and assessments, this marks a turning point in those pupils' educational careers that henceforth impacts the learning opportunities that teachers, classmates and others will provide them within schools (e.g. Cicourel and Kitsuse 1963; Mehan et al. 1996) or between school types (Gomolla and Radtke 2002). Evidence suggests that existing classification systems serve the purpose of diagnosis at the expense of treatment (McDonnell et al. 1997, p. 85). The effectiveness of any

## 9. DISABILITY AND INEQUALITY IN EDUCATIONAL OPPORTUNITIES AND LIFE CHANCES

Research shows that inclusion and segregation vary strongly between countries, within countries and according to the type of diagnosed SEN or disability. Nonetheless, the classification of students as 'having SEN' is on the rise worldwide (Richardson and Powell 2011). Despite this, as shown above, very few European countries have substantially abandoned school segregation since the UN CRPD was ratified, although inclusive practices can be found in schools in all regions of Europe, in highly segregated and more inclusive systems (Powell et al. 2019, in press). To explain the persistent phenomenon of school segregation, we looked at the ways in which disability affects the life course of pupils and how it is defined by pedagogical experts in the field of special education. At the intersection of disability studies and life course research, comparisons of policies on the macro-level, organizations on the meso-level, and individual experiences on the micro-level – if brought into dialogue – deliver deeper insights than are possible on one level or in cross-sectional analysis.

In schooling, the labelling of students deemed in need of support or attention leads to the 'labelling-resource dilemma' (Füssel and Kretschmann 1993). Because teachers teaching pupils they find challenging often only receive additional support when their pupils are labelled, the aggregate classification rate of children continues to rise in many countries. But classification and inclusion rates not only differ between countries, but also differ depending on their age and grade. This is because, at (very) young ages, disability is often defined as a health issue. Once of school age, 'disability' is mostly defined according to difficulties in participating successfully in regular classrooms given existing conditions. And for adults, disability is defined relative to the capacity to work. The risk of 'becoming disabled' (Powell 2006) due to segregation generally rises with age. Far more boys than girls and far more migrants than natives are classified as being learning disabled or needing support in their learning process. Yet instead of being only compensatory, these programmes highly stigmatize and structurally disadvantage pupils (Pfahl 2011). In Germany, for example, the vast majority of special school leavers do not receive a basic school certificate. Transitions into vocational training are therefore difficult: only one-fifth of special school leavers transition from schooling into vocational training, with most participating in short-term vocational preparatory programmes that, however, do not often sufficiently support youth with 'learning disabilities' to successfully transition into the labour market (Blanc 2019). Even today many adults with disabilities neither have any vocational training nor an occupation to call their own. The sociologies of education and work emphasize that the lower the school certificate and the more severe the impairment, the harder a person finds it to access vocational or professional training or work. Few studies analyse labour market development and disability across European countries, but those that do (see e.g. Maschke 2008) analyse them according to the living situation, income and wealth distribution, and welfare status of disabled people indicate that a majority live in very poor or poor financial conditions. People with disabilities claim that they struggle to cover their basic needs with the social policy provisions accorded them (Maschke 2008, p. 97). Overall, people with disabilities in Europe have much lower chances to access regular schools, to maintain qualifying school certificates, and to participate in the labour market than the rest of the population. The European Social

diagnostic categories has been seriously questioned because the intuitively appealing basic assumption behind them – that of increased treatment utility – has not been borne out by empirical research (Slate and Jones 2000). Categorical labels are often misleading, allow misdiagnosis, and facilitate negative stereotyping (Mertens and McLaughlin 1995, p. 6). Because of their ubiquity, their scientific bases and their interpretation by prestigious professions such as medicine and psychology, these classifications defend the status quo as they appear rational, scientific and neutral (Bourdieu 1984, pp. 466–477). Yet, a cultural comparison shows, these classificatory judgements are not only highly subjective but also, in conjunction with tracking, wield the power to alter individual trajectories through life, particularly at status passages in ever more important educational careers (Powell [2011] 2016).

Among the psychosocial implications of these learning opportunity structures are changed expectations among teachers, parents and peers, but also self-expectations of pupils and stigmatization, lessened self-efficacy or competence, opportunity restrictions or discrimination, and civil and social rights limitations. In terms of school performance, a variety of constructs, such as competence and self-efficacy, describe skills and experiences imparted in (special) educational structures that affect educational (non-)attainment. Bandura describes the importance of social interaction to the utilization of skills, and individuals' difficulties in benefiting from their skills or intelligences when their status is low:

When people are cast in subordinate roles or are assigned inferior labels, implying limited competence, they perform activities at which they are skilled less well than when they do not bear like negative labels or the subordinate role designations. Offering unnecessary help can also detract from a sense of competence and thereby vitiate the execution of skills. (Bandura 1990, p. 347)

Labelled individuals may suffer a reduced sense of personal efficacy from then on. Students placed in lower tracks risk losses of self-efficacy and aspirations, even if specialized or additional resources are made available to meet their SEN, which have traditionally justified segregated educational environments. While placement in 'lower-level' schooling can detract from self-esteem, motivation to learn and expenditure of effort in school, differing views of track placement's influence on achievement orientations suggest that socialization processes such as teacher–student and peer relationships mediate that influence, or students adjust their aspirations according to their self-placements and their predecessors' fates (Mortimer 2000, pp. 21–22). It is clear for all participants in special education that they are not only different, but different in ways considered negative (Pfahl and Powell 2011). Continuing discrimination depresses the aspirations of disabled children and youth as they grow up in societies in which disabled people's contributions to society are systematically undervalued. Having low self-efficacy is associated with having expectations of failure and not being able to control life situations. Furthermore, 'personal efficacy is positively related to health, morale, cognitive functioning, and economic well-being' (Lachman 1985, p. 188). Stigmatized individuals may invest heavily in a variety of psychological and behavioural coping strategies to counteract lowered self-efficacy and self-esteem. But pupils' stigmatized social position hinders their development of self-expectations and aspirations for their futures.

Protection Committee (SPC) recently stated that there is a 'general continued deterioration in the relative poverty situation, its depth and persistence' (SPC 2016, p. 6).

In this chapter we discussed how professional knowledge of disability in schooling has spread worldwide through the idea that children 'have special educational needs', which leads to their being labelled, their segregation, and ultimately their becoming disabled. Then we explained the mechanisms of school tracking and segregation that lead to persistent inequalities in institutionalized learning opportunities. This in turn results in reduced educational opportunities and ultimately further disadvantages over the life course, especially in training and work, but also in participation in community life.

We conclude with developments on school inclusion and the need to ensure the right to inclusive education to strengthen the social rights of people with disabilities. Related to EU policies, awareness-raising strategies on the rights of persons with disabilities are not continuous, do not include all institutions, and exclude certain groups of persons with disabilities (Waddington et al. 2016). Additionally, there is a lack of systematic and institutional approaches to facilitate the inclusion of disabled persons across Europe. Developing disability mainstreaming policies requires an emancipatory research framework, data collection and consistent participation of persons with disabilities (Degener 2017). Associated perspectives, however, have to insist on structural changes in all spheres of society and on a sufficient redistribution of educational opportunities as well as financial resources (Verloo 2006). The efforts in social change include developing knowledge about enabling factors that contribute to improved standards of living as well as access to and full participation in society.

However, thus far, few longitudinal social science data sets – or the social science disciplines more generally, including the subfields presented here – have adequately addressed disability in its complexity and richness, and across societies (e.g. Altman and Barnartt 2000; Albrecht 2017). For education, such longitudinal, multilevel and cross-cultural research is necessary to explain the considerable variance in classification, educational attainment and life chances by disability or special needs category, region and cohort that could only be suggested here. Given the significant changes in thinking about special and inclusive education brought about by the UN CRPD over the past decade, social and educational research must also keep pace with often rapid change in local schools and larger contexts, especially as inclusive education develops beyond pilot school projects; indeed, it implies the restructuring of all schooling. On the other hand, the global movement towards school integration and inclusion of children with SEN needs to be more fully utilized as a tool for meaningful reforms that respond to research results that have uncovered the complex factors and mechanisms that result in students' placement in lower educational tracks and, more challenging still, why the link between participation in special education and lessened chances over the life course remains so strong. Internationally, there is some cause for optimism beyond the promise of increased multidisciplinary attention to these issues. Despite resistance to implementation of inclusive education reforms, regions such as the Nordic countries (e.g. Norway) and Southern Europe (e.g. Italy) have, within contrasting welfare regimes and education systems, almost completely eliminated segregated special schools. Led by the disability movement, societies and international organizations alike increasingly question educational separation and segregation and their negative life course consequences of stigmatization, discrimination and maintained or exacerbated social inequality. Mainstream sociology of education would increase its contributions and

relevance were it to be more inclusive in analysing the processes that affect the educational opportunities and life chances of those who are classified in educational organization and experience disablement.

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# Research Handbook on the Sociology of Education

*Edited by*

**Rolf Becker**

*Professor of Sociology of Education, University of Bern, Switzerland*

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