



INCLUSIVE PEDAGOGY ІНКЛЮЗИВНА ПЕДАГОГІКА

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HISTORICAL STAGES OF INCLUSIVE EDUCATION DEVELOPMENT IN THE SCANDINAVIAN COUNTRIES

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The article provides a periodization of the formation and development of inclusive education in the Scandinavian countries. Based on the theoretical analysis of the problem, the main problems in periodizing complex nonlinear pedagogical processes and phenomena, in particular, inclusion in the education system abroad, are identified. It is noted that despite the similarity of the main historical trends in the social development of the Scandinavian countries, each of them has gone its own way to create a system of inclusive education for children with special educational needs. Based on the analysis of domestic and foreign scientific publications, the author substantiates the opinion that the criterion for periodizing the development of inclusive education in the Scandinavian countries can be social and institutional. Based on the analysis, three main stages of development of the inclusive education system in the Scandinavian countries are identified: Stage 1 – the stage of charity in favor of special education (the second half of the nineteenth century – the first half of the twentieth century). Within this stage, the future inclusive system in the Scandinavian countries was developing in the area of special education. Charitable support became the main tool for the development of educational institutions for children with special educational needs and certain functional limitations. Stage 2 – the stage of regulatory and organizational formalization of inclusion as a social institution (second half – end of the twentieth century). During this period, inclusive education in the Scandinavian countries was legally formalized. It is noted that each of these countries established the legal framework for the organization of inclusive education in its own way; however, the general trend was to comply with international documents that defined the rights of a child to receive quality education regardless of their physical condition. Stage 3 – systemic, representing the stage of introduction of institutional innovations in the educational sphere (late twentieth century – to date). During this stage, the system of special education in the Scandinavian countries actually ceased to exist and was replaced by the system of inclusion with a corresponding model and theoretical concept of its implementation in each of the Scandinavian countries.

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ІСТОРИЧНІ ЕТАПИ РОЗВИТКУ ІНКЛЮЗИВНОЇ ОСВІТИ В СКАНДИНАВСЬКИХ КРАЇНАХ

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У статті представлено періодизацію становлення та розвитку інклюзивної освіти скандинавських країн. На підставі теоретичного аналізу проблеми встановлено основні проблеми в періодизації складних нелінійних педагогічних процесів та явищ, до яких відноситься й інклюзія в системі освіти за кордоном. Відзначено, що попри схожість головних історичних тенденцій в суспільному розвитку скандинавських країн, кожна з них проходила свій шлях до створення системи інклюзивної освіти для дітей з особливими освітніми потребами. На підставі аналізу вітчизняних та зарубіжних наукових джерел обґрунтовано думку, що критерієм періодизації розвитку інклюзивної освіти в скандинавських країнах може бути соціально-інституційний. На підставі здійсненого аналізу виділено три основні етапи розвитку інклюзивної системи освіти в скандинавських країнах: 1 етап – етап благодійності на користь спеціальної освіти (друга половина XIX – перша половина XX століття). У межах цього етапу майбутня інклюзивна система в скандинавських країнах розвивалася в площині спеціальної освіти. Благодійна підтримка стала основним інструментом розвитку навчальних закладів для дітей, що мали особливі освітні потреби й певні функціональні обмеження. 2 етап – етап нормативно-правового й організаційного оформлення інклюзії як соціального інституту (друга половина – кінець XX століття). В цей період відбулося нормативно-правове оформлення інклюзивної освіти в країнах Скандинавії. Відзначено, що кожна з цих країн встановлювала правові засади організації інклюзивної освіти свій спосіб; проте загальною тенденцією стало дотримання міжнародних документів, що визначали права дитини на отримання якісної освіти незалежно від її фізичного стану. 3 етап – системний, що являє собою етап упровадження інституційних інновацій в освітній сфері (кінець XX ст. – до нинішнього часу). У рамках цього етапу система спеціальної освіти в скандинавських країнах фактично перестала існувати і була замінена на систему інклюзії з відповідною моделлю й теоретичною концепцією її реалізації в кожній зі скандинавських країн.

Ключові слова: інклюзія, скандинавські країни, періодизація, спеціальна освіта, особливі освітні потреби, сегрегація.

Introduction of the issue. The historical periodization of educational processes is an interdisciplinary research task, as it requires the researcher's awareness of general and regional history, philosophy, and sociology. Additional complexity in substantiating the periodization of the development of inclusion in the Scandinavian countries is imposed by other factors, namely:

1. The research is carried out in the field of pedagogical comparative studies, not the history of pedagogy, which has its own scientific apparatus, methodological basis and research tasks. The vast majority of scientific works on the periodization of educational processes are still historical and pedagogical, not comparative ones.

2. Despite the similarity of the main historical trends in the social development of the Scandinavian countries, each of them has gone its own way to create a system of inclusive education for children with special educational needs. Therefore, identifying the common historical stages of the development of the phenomenon under study shared by all these countries is a rather difficult task.

3. The actual periodization of the process under study should be carried out within certain general chronological limits. However, both defining such general chronological boundaries and dividing them into separate periods is methodologically complicated, since the lower chronological boundary can refer to both the mid-twentieth and the second

half of the nineteenth century (when the foundations of special education in these countries were laid). It all depends on what exactly is meant by inclusion in the education system and what historical prerequisites can be included in the historical periodization of this comparative pedagogical phenomenon.

Current state of the issue. Using established methodological approaches to the periodization of pedagogical phenomena and processes, one can highlight the research papers by T. Kotyk (2020) on the problem of methodological foundations of periodization of pedagogical phenomena and processes [1]; H. Rusyn (2021) on the periodization of the development of the Ukrainian ethnopedagogy [2]; N. Seiko (2009) on the periodization of charity and education in Ukraine [3]; V. Strumanskyi (1996) on the methodology of periodization of historical and pedagogical processes [4]; O. Sukhomlynska (2002) on cultural, anthropological and civilizational approaches to the periodization of historical processes in education [5], etc. Based on the analysis of these scientific works, we can conclude that the result of periodization is usually determined by the object and aims of the research. Based on the scientific apparatus, the researcher projects the information obtained in the course of work into their research thesaurus and forms their own periodization criteria.

Outline of unresolved issues brought up in the article. Upon the agreement with the scientific conclusions of E. Khrykov (2016) [6], it should be emphasized that the vast majority of scholars, while researching pedagogical phenomena in their historical retrospective, choose socially oriented periodization criteria, underlining the social and institutional mission of education at any stage of society's development. In fact, this research will also focus on the social goal-setting and institutional content of the history of inclusion in the Scandinavian countries. In my opinion, such a criterion will allow one to create a generalized periodization of this pedagogical phenomenon in the

overall structure of the educational institution of each country. At the same time, I have not found a separate periodization of inclusive education in the Scandinavian countries throughout the entire period of its formation and development.

Aim of research is to substantiate the main periods of formation and development of inclusive education in the Scandinavian countries in the second half of the nineteenth and early twenty-first centuries.

Results and discussion. Inclusive education in the Scandinavian countries (Sweden, Denmark, Norway, Iceland and Finland) is one of the most valuable areas of educational and social policy. It arouses keen interest and provokes ongoing debate about the ideology, policies, theories, practices and methods of its effective implementation in general education institutions. The introduction of inclusive education into the general education process in Scandinavia dates back to the second half of the twentieth century, when special education was no longer able to meet all the requirements for the development of a healthy society with equal opportunities for everyone. However, it should be noted that in most countries, special education is still an alternative form of education for those children with special needs who cannot attend secondary schools due to their health conditions. The connection between inclusive and special education is obvious, so it is worthwhile, in my opinion, to draw some parallels between these two types of education to trace the transition from one to the other. So, in order to justify the periodization of the development of inclusive education in Scandinavia, let us consider the peculiarities of the historical development of this phenomenon in individual Scandinavian countries.

Sweden. The analysis and interpretation of the holistic picture of the history of inclusive education in Sweden should begin with the history of special education in this country since 1842, when the so-called "people's school" – *allmän folkskola* – was introduced. The purpose of this school was to provide

education to all citizens (before 1842, only middle and upper class citizens could receive education). In practice, it turned out that educational institutions were divided into two groups: some provided education for the poor and disabled children, while others educated middle-class children. Thus, attempts to introduce elements of inclusive education can be traced back to those times. However, later these institutions were clearly divided into two categories – special educational institutions and general education schools.

According to the Swedish scholar J. Rosenqvist (Department of Pedagogy, Lund University), the development of special education in Sweden can be divided into three stages:

- the stage of no distinction between children with special educational needs (special schools were not divided by nosology, they accepted children with deviations from the “norm”; the purpose of such schools was to teach children basic skills necessary for life)
- the stage of division of special schools according to differences in children's health status (special schools began to be divided by nosologies, and curricula were developed to take into account the characteristics of each group);
- the stage of integration (special education was gradually replaced by inclusive forms of education) [7].

Since the 1960s, secondary education in Sweden has been based on the principle of "school for all". The educational policy of that time provided for compulsory secondary education for all citizens without exception, equality and, of course, inclusion. However, it should be noted that even with such an educational policy, Sweden could not avoid differentiation, classification and categorization of children with special educational needs. Moreover, the number of special educational institutions for children with disabilities has been growing. This was primarily due to the fact that the country did not have complete statistics on the existence of such children: the education system was decentralized, schools were subordinated to municipalities and carried

out local activities to address the problem of inclusive education on the ground [8].

This lasted until 1989; subsequently, Sweden ratified a number of documents that protect children's rights to quality education: The UN Convention on the Rights of the Child (1989), the UN Standard Rules on the Equalization of Opportunities for Persons with Disabilities (1993), the Salamanca Statement and Framework for Action on Special Needs Education (1994). These documents proved to be a powerful regulatory framework that made it possible to avoid segregation in the school system; they also served as a framework for the creation of reports, directives, and orders on the implementation of inclusive education in the general education process.

One of the documents regulating the system of inclusive education in this country is the Swedish Education Act (1985, 2010), which states that:

- all children should have equal access to education regardless of their gender, place of residence, social or economic status;
- special support should be provided to students with learning difficulties;
- the majority of students in need of special support should study in regular classes of compulsory general educational institutions, as well as in upper secondary schools [9].

Norway. The history of education in Norway dates back to 1152, when the first church schools were opened, eventually becoming Latin schools; general education schools were introduced in 1739. Although Norway's legislation proclaimed universal access to education, in practice it turned out that illiteracy was the norm. The first wave of education modernization took place in 1827, when Norway gained independence from Denmark. It was then that the basic principles of school education began to be developed, requiring children to attend school for at least two months a year between the ages of 7 and 15. Accordingly, the development of the school education system has also brought about certain amendments to the regulations, requirements and age limit for students of general education institutions, namely:

- 1845 – the volume of students' academic workload per year was set at 18 to 24 hours per week for 45 weeks;
- 1889 – the state general education school was transformed into a national primary school for children aged 7 to 14;
- 1936, 1959 – general education institutions were modernized;
- 1969 – the primary school was transformed into a nine-year school (children were educated from 7 to 16 years old);
- Since 1997, children have had to study for 10 years, with children starting school at the age of 6 and studying until the age of 16.

Nowadays, the Norwegian school system has three tiers: primary school (grades 1-7), secondary school (grades 8-10) and upper secondary school (grades 11-13, required for those who want to continue their education in tertiary institutions). 97% of children receive secondary education in state general education institutions from grades 1 to 10, 94% of students continue their education in high school, and the rest prefer private educational institutions [10]. Such indicators give grounds to conclude that the quality of secondary education in Norway's public secondary schools is high.

The history of special education in Norway dates back to the 1800s, a period of philanthropy, growing religious tolerance and the development of Christian charity for disabled children. Norwegian researchers of special education Rune Sarrormaa Hausstatter

and Harald Thuen (University of Lillehammer) distinguish two approaches to the history of special institutions in Norway. The first is based on scientific and medical interest in children with special needs. Owing to the research, three special educational institutions were established in Norway: for the deaf (1825), for the blind (1861) and for children with mental retardation (1874). Subsequently, in 1881, a law called the Act on the Education of Children with Abnormalities was adopted. Thus, the education of children with special educational needs became the responsibility of the state, although the funding of such institutions still depended on the support of private individuals engaged in charity. The second approach was applied to children who did not have persistent health problems but were socially maladjusted. The definition of this approach as different from the previous one does not mean that new specific methods, techniques and technologies for teaching such children were sought and developed. The main goal was to create a new environment for the care and upbringing of these children, as a replacement for their stay in their own families. The first institution of this type appeared in Oslo in 1841 and had a reputation as a "rescue institution"; later, such institutions were treated as foster care centres.

Norwegian scholars identify five periods of development of special education in Norway (see Table 1) [10].

Table 1.

Key stages in the development of special education and its transition to an inclusive model in Norway

Period name	Time frame	Characteristics of the period
The age of philanthropy	1825-1880	Charity underpinned this period of special education development in Norway. Special institutions were opened on the initiative of philanthropists who wanted to demonstrate their love for their neighbors. Blind, deaf, mentally unbalanced and socially maladjusted children had the opportunity to stay in special institutions, learn basic skills and communicate with pastors. Such institutions were usually opened on separate islands, from which it was almost impossible to escape; thus, the educational process took place in a geographically closed space

<p>The age of segregation: protecting society</p>	<p>1880-1950</p>	<p>The age of segregation began when Norway was the first country in Europe to adopt a law that defined the rights of children with special educational needs. This act regulated the "Treatment of Children with Abnormalities", later called the "Act on Schools for Children with Abnormalities" (1881). During this period, there was still a clear distinction between educational institutions for children with medical diagnoses of disability and those for children with socialization problems. In 1889, another document appeared – the Act on Children’s Care Institutions. Despite the tendency to provide education to all children that was characteristic of the period, both documents aimed at excluding children with special educational needs from school, thereby "protecting" the "good" school and "normal" children. At the beginning of the twentieth century, Norway created a system of segregation that divided all children into three categories: children for normal schools, children for special schools, and children who were not capable of learning. After a while, this classification of educational institutions came under severe criticism. The public was outraged by the fact that institutions for children with disabilities had poor material resources, a lack of specialists to care for them, and were remote and cut off from real life. In the 1930s, segregation processes led to a rapid increase in the crime rate among children brought up in care centers for "difficult" children. Soon, these institutions discredited themselves both administratively and educationally.</p>
<p>The age of segregation: what is best for the child</p>	<p>1950-1975</p>	<p>In 1951, the previous Act on Schools for Children with Abnormalities was replaced by the Act on Special Schools, opening up new opportunities for the development of special education and, in particular, the development of special educational institutions. This law expanded the definition of special categories of children according to the specifics of their disabilities: blind, visually impaired, deaf, hard of hearing, children with mental disabilities, children with reading and writing difficulties, and children with difficulties in social and behavioral adaptation. However, the overall state policy continued to be aimed at completely segregating the above categories of children. The network of special educational institutions was expanding and becoming more variable, i.e. a separate special educational institution was provided for each category of disability. A characteristic feature of this period was the lack of quality professional training for staff working in special education institutions, and the impossibility of their self-development and improvement of professional skills for working with special children. Given the lack of special scientific developments, teachers only shared practical experience and improved their skills through trial and error. Until the 1960s, the issue of integrating disabled people into society was not raised. The task of special pedagogy was to develop the basics of caring for disabled children so that they did not feel like patients in a clinic; at the same time, the issues of individual psychological and social peculiarities of their development were not considered.</p>

The age of integration	1975-1993	<p>In 1975, the Special Schools Act became part of another law, the Primary and Lower Secondary Schools Act. Since then, a long process of transition from the then traditional special education for children with special educational needs to integrated education has begun. Educational institutions began to be seen not as fulfilling the needs of society, but as working for the needs and interests of each child and meeting the level of their requirements (both medical and pedagogical). This approach allowed every child to enjoy the right to education. The main objectives of integration were proclaimed to be the right of everyone to become part of the community, the right to a share of the community's property, the responsibility of each person for their own actions, and the fulfilment of their duties towards the community. The aim of integration was to remove or at least minimize barriers at the interpersonal, social and organizational levels. Scientific discussions on the feasibility of restructuring special educational institutions have been conducted in two dimensions: 1) support for special education as a system capable of providing education and support for children with special educational needs, depending on the category of disability; 2) harsh criticism of the segregated form of education implemented by special education institutions and the transition to the process of normalization of the educational sphere. The process of normalization involved the integration of disabled children into society. It is worth noting that the integration process was rather slow, but it allowed for the development of two key strategies: 1) development of special education to the level of acceptance of integration as an inevitable factor in its growth; 2) reform of the general education system to accommodate the increasing number of children with special needs and diversification of curricula to enable every child to study in a general education institution.</p>
The age of inclusion	1993 – to date	<p>The closure of special schools and a strong process of integration of children with special educational needs took place in Norway until 1993, a year before the signing of the Salamanca Statement and Framework for Action on Special Needs Education (1994). However, integration did not address the issue of proper socialization of children with special needs. The next step was inclusion; the concept of inclusive education envisaged free communication between students, establishing friendly relations with any student in the class or school, and active participation in the life of the school community. In this way, a model of democratization of society was introduced on the example of a secondary school, and, as a result, the necessary support and opportunity for every child to receive a quality education was provided. In other words, the Norwegian model of inclusive education envisaged, in addition to the mechanical integration of a child with special educational needs into the school community, the transformation of the approach to teaching, reform of the teacher training system, and optimization of forms, means and methods of teaching children in an inclusive classroom. The ultimate goal of introducing inclusive education in Norway was to reduce the number of special schools to a minimum and provide families with children with special needs with the right to choose a school.</p>

[Source: developed by the authors]

Iceland. Inclusive education in Iceland has become an integral part of the policy of democratization of education, dating back to 1974 after the adoption of the Schools Act. The main goal of compulsory general education at that time was to prepare students for life and work in a democratic society. In fact, the term "inclusion" appeared only 20 years later, when Iceland, along with other Scandinavian countries, signed the Salamanca Statement and Framework for Action on Special Needs Education (1994). However, the 1974 document already had a clear implication for the development of inclusive education, namely: the need to ensure equal access to quality public school education for all children without exception, without separation from their families, i.e. in a local school, the definition of the main goal of the school institution – to take into account the differences of each child and develop flexible curricula and individual plans for a tailored approach to learning [11].

The 1974 Schools Act and the national curriculum for primary school students (7-16 years old) were quite revolutionary not only because of the requirement to democratize the secondary education system and expand the network of inclusive educational institutions, but also because of the actions that necessarily followed this decision: updating the curriculum, creating a radically new curriculum, professional training of teachers to work in an inclusive environment, retraining of teachers, creation of new educational materials, etc. Ingólfur Ásgeir Jóhannesson, an Icelandic scientist and professor at the University of Iceland, describes this process as follows: "If we analyze the history of education in Iceland at the end of the twentieth century from this point of view, we can see that attempts to reform it in the 1970s and 1980s were aimed at modernizing the education system with a focus on primary education (6-16 years). The reform was based on child-centered, humanistic and accessible education for all social groups, which I will call a

democratic principle. Obviously, such learning implies the use of comparative teaching methods, integration, quality as a learning process, not as a product, and many other "progressive" ideas in education" [12: 105].

It is worth noting that the implementation of the main provisions of the 1974 Schools Act required a lot of effort to put into practice in Icelandic schools. Education became not so much inclusive as democratic, but it was the first positive step towards the development of such education in Iceland. Inclusive education as such appeared in this country, as noted above, in the 1990s and was directly developed after the adoption of the Salamanca Statement and Framework for Action on Special Needs Education.

As for special education, it is represented by three special schools throughout the country: one for children with significant health problems and two for children with behavioral problems. The rest of the children attend general education schools and study in inclusive classes or in special classes in the same schools. According to Icelandic law, special schools also perform the function of supporting and assisting inclusive educational institutions in their work with children with special educational needs [13].

Based on the foregoing historical information on the formation and development of inclusion in the Scandinavian countries, it is possible to state that the most effective criterion for periodizing this pedagogical phenomenon is **the social and institutional one**. The essence of this criterion implies that inclusion is, on the one hand, a social phenomenon determined by the basic social laws of democratic development of the human community; on the other hand, the process of formation of educational institutions that implement an inclusive model of education at all levels requires an institutional approach that ensures the integrity and systemic nature of this educational phenomenon and ensures equal rights of all children to access quality education.

Under the social and institutional criterion, **three major stages of inclusion development in the Scandinavian education system** can be distinguished:

Stage 1 – *the stage of charity in favor of special education* (the second half of the nineteenth century – the first half of the twentieth century). Within this stage, the future inclusive system in the Scandinavian countries was developing in the area of special education. Charitable support became the main tool for the development of educational institutions for children with special educational needs and certain functional limitations.

Stage 2 – the stage of *regulatory and organizational formalization* of inclusion as a social institution (second half – end of the twentieth century). During this period, inclusive education in the Scandinavian countries was legally formalized. It is noted that each of these countries established the legal framework for the organization of inclusive education in its own way; however, the general trend was to comply with international documents that defined the rights of a child to receive quality education regardless of their physical condition.

Stage 3 – *systemic*, representing the stage of introduction of institutional innovations in the educational sphere (late twentieth century – to date). During this stage, the system of special education in the Scandinavian countries actually ceased to exist and was replaced by the system of inclusion with a corresponding model and theoretical concept of its implementation in each of the Scandinavian countries.

It should be noted that each of the stages identified does not have a clearly defined time frame. We can explain this by the fact that each of the Scandinavian

countries developed in the context of its own cultural, anthropological, socio-economic and socio-educational context. In fact, each periodization depends on a set of factors that determine the dynamics of changes in the development of a particular socio-pedagogical phenomenon or process, so inclusion is no exception to this rule.

Findings of this study and prospects for further research. Thus, in the process of periodizing the formation and development of inclusive education in the Scandinavian countries, the article identifies the main problems in periodizing complex nonlinear pedagogical processes and phenomena, including inclusion in the education system abroad. It is noted that despite the similarity of the main historical trends in the social development of the Scandinavian countries, each of them has gone its own way to creating a system of inclusive education for children with special educational needs. Based on the analysis of domestic and foreign scientific sources, it is proved that the criterion for periodizing the development of inclusive education in the Scandinavian countries can be social and institutional. According to the analysis, three main stages of development of the inclusive education system in the Scandinavian countries have been identified: the stage of *charity and philanthropy* (second half of the nineteenth century – first half of the twentieth century); the stage of *regulatory and organizational formalization* of inclusion as a social institution (second half – end of the twentieth century); *systemic*, representing the stage of introduction of institutional innovations in the educational sphere (end of the twentieth century – to date).

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