

Critical Realism: The required philosophical compass for inclusion?

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ABSTRACT

Although during recent years in the field of special education there has been much debate regarding inclusion and people's beliefs around disability, it is suggested that what has been lacking in many of the discussions is any coherent guiding philosophy that helps direct research in this area.

The paper proposes that critical realism, developed by philosopher Roy Bhaskar, may provide such a framework and offers a philosophical 'compass' (Egbo, 2005) to researchers who want to be engaged in critical social scientific inquiry. The paper will briefly outline the main ontological and epistemological tenets of critical realism before exploring these in relation to the literature in the fields of disability, inclusion and special education. Finally it suggests that critical realism avoids many of the fallacies associated with educational research and could be seen as a useful way forward in the debate around inclusion and propose where further research is required.

Introduction

After working in special education for fifteen years, including five years a senior leader, it was interesting to note that a focus on beliefs and values that inform the education phenomenon of special education was never acknowledged or challenged.

There were undoubtedly discussions about which children were 'eligible' for special education and the role of special education in an inclusive education environment but much of this came down to individual discussion and debate rather than a philosophically reasoned argument. Individual's ontological and epistemological groundings were certainly never mentioned, and therefore it was difficult to sometimes understand where people were 'coming from' never mind how philosophically sound or not their rationale was.

I would suggest that discourses in the fields of inclusion and disability continue to present competing views of what is legitimate or not, as various paradigms vie to establish their legitimacy. I propose that what is lacking in many of the discourses is any coherent guiding philosophy that helps direct discussion and ultimately research. Therefore the proposed focus of this paper is to explore disability, special education and inclusion using a critical realist philosophical framework with which to critically review the literature before moving onto a proposed way forward.

Critical Realism

I believe that critical realism, developed by Roy Bhaskar, may be helpful in providing a framework which offers a philosophical 'compass' (Egbo, 2005) to researchers who want to be engaged in critical social scientific inquiry. Roy Bhaskar is seen as the key theorist in the development of critical research through his work in the late 1970's onwards and he continues to develop and refine critical realism. His work can be quite inaccessible at times due to the 'dense' language and style of putting the key concepts into detailed formulae and so the work of other key theorists in developing critical realism to become more accessible and clearly explained has been important (Archer, 1995; Collier, 1994; Corson, 1991b).

Critical realism is a philosophy of science and as such it offers a meta-theory, that is, one which embraces ontological and epistemological elements, which tells us what structures, entities and mechanisms make up the social world (Bhaskar, 1978, 1989 a, 1989 b). For the purposes of this paper, ontology is identified as the 'world as it is' and epistemology as the 'world as we know it', or in other words our 'knowledge' of it (Collier, 1994).

What I intend to do in this paper is firstly explore the ontological and epistemological premises of critical realism before identifying its main tenets, which will then enable me to review the relevant literature about inclusion, disability and special education and subsequent discourses.

An important aspect to realist social theory is that it is based in three ontological premises about social reality: firstly, that of intransitivity; secondly, the stratification of reality and; thirdly, the presence and role of causal relations operating in social reality (Archer, Bhaskar, Collier, Lawson, & Norrie, 1998; Collier, 1994; Egbo, 2005; Warner, 1993). It is to these that I shall now turn.

Intransitivity

One of the most important philosophical distinctions associated with Bhaskar's critical realism is the one made between **intransitive** and **transitive** objects of knowledge.

The **intransitive** dimension consists of objects of knowledge that are 'in general invariant (*non changing relationship*) with respect to our knowledge of them; they are the real things and structures, mechanisms and processes, events and possibilities of the world; and for the most part they are quite independent of us' (Bhaskar, 1978).

An example of this could be seen to be the relationship between special education leader and parent in the special education setting. Often the parent takes on a subservient role in meetings whereas they have at least as much and often more to contribute but can feel intimidated by the status of the leader as a professional. Whilst the professional feels they do (should) have the greater 'knowledge' in relation to the child's disability and so take on the role of imparter of knowledge. In the intransitive dimension neither party is aware of the underlying structures, mechanisms and processes at play.

The **Transitive** dimension is seen as consisting of our knowledge of the world. Using the same example as for the intransitive dimension, in this case both parent and professional, or at least one of them, are now aware of the way the knowledge relationship is commonly viewed and acted out. Either or both may then continue to act as before or not but the key difference is now there is knowledge regarding what mechanisms are present.

To try and clarify things further, critical realists, and I count myself in this, believe that human beings and their social relationships exist in the natural world. Thus, social structures are real if changing things; they are social things and as such have their own qualities, independent of our knowledge and understanding of them. More over, such social structures have to be discovered as they are not transparently obvious to us.

I believe in the possibility that some things that exist in the intransitive dimension can become progressively known through the interaction between human theory and experience of the world. Indeed, I see this as the reason in undertaking research into society and its structures in order that relationships can be explored and attempts at explaining them undertaken in order to gradually try and understand the world, the intransitive objects of knowledge, in the transitive dimension, with the ultimate goal of bringing about social change where inequalities are exposed. This fits closely with critical realism which aims to interpret in the world in order to ultimately bring about change, as Bhaskar (1989) states: 'the world cannot be rationally changed unless it is adequately interpreted' (p5). I will now move onto the second ontological premise: the belief in the stratification of reality.

Stratification of reality

For critical realists the world of existing things is stratified (Collier, 1994; Warner, 1993). There would appear to be two elements in relation to the way that stratification is exemplified by critical realist.

For Archer (1998) stratification of reality is identified as 'both the horizontal and vertical explanations of why they (**structures, processes**) are occurring, that is, historical factors and current context' (p.196) (information in bold added by author). This relates to the need for a good level of contextual knowledge; historical, political and social, in order to attempt to interpret the mechanisms present.

The other element to the stratification of reality is the ontological distinction drawn between what are called the domains of reality namely; **Empirical, Actual and Real** (Collier, 1994; Outhwaite, 1998; Sayer, 1992; Scott, 2005; Warner, 1993).

My interpretation follows the work of Warner (1993) quite closely but also draws on the work of others who have similar but not identical views of what Bhaskar means in relation to the 3 domains as this is beyond the scope of this paper (Collier, 1994; Sayer, 2000; Scott, 2005).

I understand **Empirical** to be viewed as things that we can experience through our senses or perceptions of what is occurring, these by their very nature can be misleading such as how are brain can interpret what are eyes see inaccurately, such as line patterns which look like they are not horizontal but in fact are, or the way we perceive how things operate. Using the example given previously with the meeting between professional and parent; the parent may be trying to be as

helpful as possible by giving a range of strategies that have worked with their child at home, whereas the professional perceives that the parent is criticising their current practice. I view **Actual** as the events that happen in the world outside of our perception of them, using the same example again; the actual reality is that the meeting takes place and that a range of perceptions are at play between the two people in the meeting. Finally, I see **Real** as the mechanisms and structures that have causal powers which may or may not be exercised. Again using the same example, the critical realist view is that there are likely to be power/knowledge relationships which exist between the professional and parent; professional as the holder of ‘privileged’ knowledge and experience against the ‘amateur’ knowledge of the parent. These power/knowledge relationship mechanisms may or may not be exercised and are therefore seen as tendencies. If they do operate the reality has moved into the Actual domain. The aim of critical realist research is to uncover the mechanisms in the real domain and their causal powers, acknowledging that these may or may not be exercised. This has a crucial implication for this ontology as it is ‘the recognition of the possibility that powers may exist unexercised and therefore what has happened or been known to have happened does not mean this is the limit of what could happen or have happened, this therefore makes it possible to understand how we could be or become many things which currently we are not’ (Sayer, 2000, p 13). The final significant aspect in relation to the 3 domains is that of the independence of the real domain from the others (Collier, 1994; Corson, 1997; Dobson, 2002; Sayer, 2000; Scott, 2005). I see this as noteworthy as it is closely related to the distinction that is often made between open and closed systems; where ‘open’ systems are those viewed as having multiple mechanisms and interactions taking place at any one time and that these can never be exactly replicated and that this must be recognised within any claims regarding generalisation sought from research.

Causal relations

A major element to the following examination of causal relations in relation to the critical realist perspective is that of the belief in ‘the dual character view of the world’, that is, the mutually interactive nature of society and individual (Archer, 1995; Bhaskar, 1989 a, 1998b; Collier, 1994; Corson, 1991b).

This is the view that individuals and social structures have a degree of independency and interdependency which brings about the ‘riddle’ of structure and agency, where structure is viewed in relation to the social structures at play and agency is identified as human purposiveness such as wants, beliefs, desires and emotions (Archer, 1995).

In other words, this means that the critical realist view of social reality is that individuals both reproduce and transform social structures as well as are formed by them, whilst social structures both shape and place constraints on individuals but are also the result of continuous activity by individuals. In Bhaskar’s words: ‘...society must be regarded as an ensemble of structures, practices and conventions which individuals reproduce or transform, but which would not exist unless they did so’ (Bhaskar, 1998b, p.36). This is important in that it brings about the possibility of transformational social activity as identified in Figure 1 which means that the critical realist view is that there is the opportunity for individuals to impact on society whilst recognising the impact society does have on individuals.

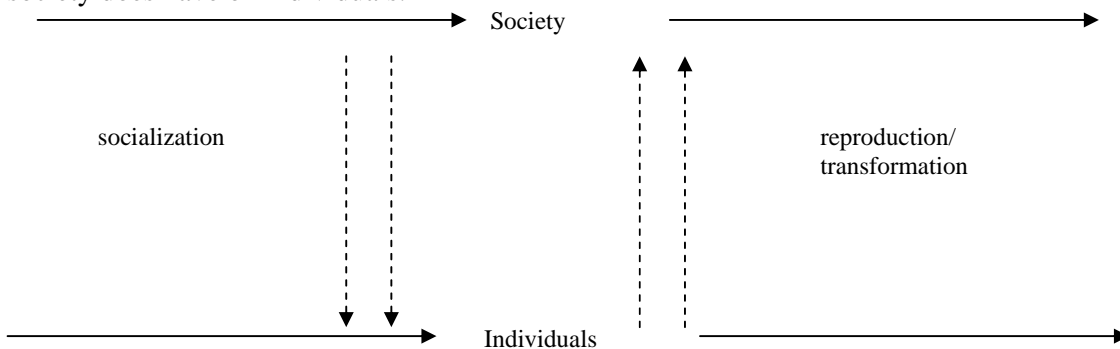


Figure 1 The Transformational Model of Social Activity (Bhaskar, 1998b, p 217)

An example could be, if it is presumed that leaders in special education will play a transforming role in helping to bring about a more inclusive educational system, what role do their values and beliefs (mechanisms) play in bringing this about? What I propose is that this research and literature is missing in the current debate.

In its original form the model of transformational social activity is probably a little too simplistic and Bhaskar (1989b) does go on to provide some crucial revisions to his original thoughts in which explores structure and praxis in the interaction between society and individuals.

In elaborating what is meant by agency, Archer (1995) argues that we 'need to distinguish between *collective agents* and *individual actors*. The reality experienced by the collectivity is not reducible to the personal reactions of its members; nor is the subjectivity of the latter understandable without reference to the objectivity of the former' (p 120).

Having explored structure and agency as viewed from a critical realist perspective the other significant element to review in relation to causal relations is that of structure and more implicitly, mechanisms. In assisting with understanding the interplay between society and individual, structure and agency it is helpful to refer directly to Bhaskar who states: 'Society is not the unconditioned creation of human agency (voluntarism) but neither does it exist independently of it (reification). And individual action neither completely determines (individualism) nor is completely determined by (determinism) social forms. In, unintended consequences, unacknowledged conditions and tacit skills...limit the actor's understanding of the social world, while unacknowledged (unconscious) motivation limits one's understanding of oneself' (1979, p 286).

The realist explanation of how things occur is that the *outcome* of an *action* follows from *mechanisms* acting in particular *contexts*. Or in other words, how is the leadership (action) informed by the attitudes, values and beliefs (mechanisms) of individual leaders within their professional lives (context) and how does this impact on what actually happens (outcome), as identified in Figure 3 below:

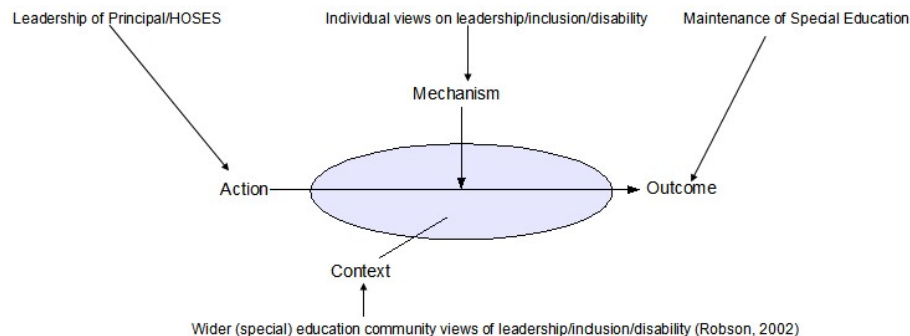


Figure 3 – A Realist Model of Outcomes (adapted from Robson, 2002)

Four concepts can be identified from Bhaskar's Realist Theory of Science (1978), they are structures, powers, generative mechanisms and tendencies (Collier, 1994). As examined in the section on stratification of reality, by using the word power and tendencies this draws attention to the existence of unexercised powers and of exercised but unrealised tendencies. I would concur with other researchers who have noted the need to be careful in attributing impact of one mechanism to another mechanism as society, and in this case, education is operating in an open system (Sayer, 2000; Scott, 2005). It is also important to acknowledge that patterns of events do not replicate exactly across settings but that there are many common causal factors present and the levels of impact of these causal factors will vary but by knowing more about these causal factors and possible interplay then 'tendencies' can be drawn (Robson, 2002; Scott, 2005; Warner, 1993).

Epistemology

As critical realism is originally based on transcendental realism it clearly keeps ontological and epistemological groundings separate and sees this as vital in ensuring that there is not a fall into the 'epistemic fallacy'; where ontology and epistemology are conflated so that it is not possible to understand how transitive methods may be used to examine relatively intransitive structures (Bhaskar, 1978; Scott, 2005).

Having explored the ontological premises of critical realism, I will now explore where these lead from an epistemological standpoint with reference to the following: knowledge and discourse; values and beliefs; and, critical realism as a form of scientific discovery. I will then identify what I see as key tenets with regards to using critical realism to explore the literature in relation to disability, special education and inclusion, before identifying why I believe the role of leaders, namely those in special education, is crucial in the debate about developing a more inclusive educational system.

Knowledge and discourse

Critical realists see systems of discourse, or Professional Knowledge, and material social structures as somewhat autonomous, yet mutually influencing one another, as was explored in the section on causal relations. Hence it can be said that critical realists view knowledge as being socially produced and therefore also transient.

In line with this critical realist view, MacIntyre (1981) identifies that these discourses or ‘traditions of thought’ are manifested in human behaviour but are subject to change and decay. These discourses are often nested within ‘supra-discourses’ (Scott, 2000) and these are best defined as the way a society or group of people understand the nature of the world and how it can be known, their ontological and epistemological beliefs. These not only influence the type of discourse operating within the group but also the rate of decay of these discourses.

Given the critical realist view of the intransitive and transitive objects of knowledge another aspect of its epistemology relates to the belief that all knowledge is fallible. Therefore, what is accepted as a view of ‘truth’ by society or groups within society is not so much about its level of correctness but more as to its function as to how particular communities of people construct and reconstruct forms of knowledge. Thus what is seen as ‘real’ by those communities at those particular times of history could be seen as a form of ‘virtual reality’ (Giddens, 1984).

In the field of critical realism there seems to be a divergence of thought in relation to a ‘theory of truth’. With Warner (1993) talking about **Convergence Theory of Truth** which is important to the realist perspective that some notion of scientific progress be maintained. Warner (1993) states that he believes that there is a convergence theory of truth where there is a gradual convergence between the conventional use of words and the way the world actually is, i.e. water was just water until more was known about its structures etc. Whereas Collier (1994) talks about **Correspondence Theory of Truth**, which is very similar to convergence but he believes is a more accurate description of what is happening in the transitive dimension. Interestingly, Bhaskar rejects both ideas as he holds the concept of fallibility as essential. Collier believes this is a mistake and is as much down to a misunderstanding of the term correspondence which he views to mean the relation that holds when *as it is said, so it is*. In my view it is not crucial to accept either the convergence or correspondence version as the key point is that of fallibility.

Previously, I think I would have related to the idea of convergence theory of truth as it would have sat more closely with my understanding of gradually finding more out about whatever is being studied, whereas now I prefer the correspondence theory as it appears to be more closely allied to the concept of society and individuals being better able to understand and explain the subject without believing that there is an ‘ultimate’ truth which we will get to.

I will now move onto the issue of values and beliefs from a critical realist epistemological standpoint.

Values and beliefs

It must be recognised that for many researchers the whole area of values and beliefs in research is potentially fraught with problems when it comes to discussing these in relation to the social sciences. This is possibly why some researchers believe that research should be value and belief neutral (Hegarty, 2001; Kavale & Mostert, 2005; Wilson, 1999).

This is not the case in critical realism with an important element to note being that realism can sustain ‘the intransitivity of beliefs and meanings’ (Bhaskar, 1978, 1989 a). Bhaskar also goes onto state

'human sciences are necessarily non-neutral; that they are intrinsically critical (both of beliefs and their objects) and self-critical; that accounts of social reality are not only value-impregnated but value-impregnating, not only practically-imbued but practically-imbuing; and that in particular they both causally motivate and logically entail evaluative and practical judgements *ceteris paribus*' (1989a, p 409).

In relation to beliefs, I believe it is helpful to distinguish between *has*, *holds* and *holds the consolidated beliefs* when discussing these areas in relation to the competing perspectives in disability and inclusion.

Has relates to a belief that plays a causal role in the actions of the actor; *holds* - where the actor reflectively endorses a belief that they can defend against reasonable criticisms to their own satisfaction by pointing to a body of evidence to support it, and, *holds the consolidated beliefs* - where a particular belief belongs to a group of rationally acceptable beliefs that no longer require further investigation (Lacy, 1997).

Clark et al (1995), also talk about the issue of 'groundedness of perspectives', individual actors bringing their own perspectives, values, and knowledge to bear on any given situation, their individual constructions of reality. Consideration of these issues has been lacking in much of the literature related to disability, special education and inclusion. I would suggest that often writers will espouse very strident views in relation to the fields identified but it is often not clear what philosophical paradigm they are coming from in terms of their ontological and epistemological beliefs. I will explore this in more detail through the literature as I believe that it is crucial, if the current debates are to make significant progress, for writers to be clear in relation to the underlying assumptions they are holding.

Scientific Discovery

Within the realm of scientific discovery the two major elements that need to be explored from a critical realist perspective are those of it as an explanatory critique and its claim of having an emancipatory role. It is also important to note that any empirical inquiry carried out along critical realist lines obviously entails examining the range of possible *mechanisms* at play and analysing which are to be studied and which are felt, in the particular context being studied, to have the most impact.

Critical realists believe that explanatory critiques have an important role to play in the development of a free and equal society as Bhaskar and Collier (1998c) state: "They expose not just false beliefs, but the false beliefs by which oppression and injustice are disguised, whether consciously or not, and perpetrated" (p389). The aim is that theory can and does transform practice. They also go on to explain the key element to explanatory critiques as being 'the ideas integral to a society can be logically contradictory, and to show that they are is to criticise them and so to criticise that society' (Bhaskar and Collier 1998c, p 394). Another important element to undertaking critical realist research is best described by Bhaskar (1989b) who states: 'At its core, critical realism rests on the assumption that the accounts of the research participants are valid scientific data that can lead to consequential social transformation if properly interpreted' (p. 271). In accepting this it gives credibility to undertaking a range of research methodologies in any study.

As identified earlier by Archer (1998), an important aspect of critical realism and particularly if it is to have a role as an explanatory critique is the idea of both; *horizontal explanation*, the explanation of events by mechanisms and antecedent causes (or stimulus); and, *vertical explanation*, the explanation of one mechanism by another more basic one. It is through both of these explanations that the mechanism(s) should be explored to be more accurate in any findings and proposals. This entails not only a *widening* of our knowledge of social systems and structures but also a *deepening* of our knowledge. Or in Collier's (1994) terms an 'explanation requires 2 terms: that which is to be explained - the explanandum and that which explains it - the explanans' (p 50). I will return to this when reviewing the literature on disability, inclusion and special education.

The second area that needs to be explored is that of critical realism's emancipatory potential. Emancipation, from Bhaskar's perspective, is dependent 'upon the transformation of structures, not the alteration or amelioration of states of affairs' (1998a, p 410). Critical realism is therefore grounded in scientific theory and also revolutionary in objective or intent.

A cautionary note is sounded by a number of authors in relation to both the scientific claims sounded by critical realism and also with regards to its emancipatory potential, which I would concur with (Benton, 1998; Collier, 1994; Sayer, 2000).

It must also be recognised that enlightening people or facilitating self-enlightenment as to unwanted determinations or illusions is not a sufficient condition in isolation and may lead to increased dissonance and despair 'for emancipation to take place the mechanisms generating the problems must be removed or blocked' (Sayer 2000, p 160).

Given the concern with using the terminology emancipatory, a more accurate term in relation to this study may be the use of transformative. In this study the word 'transformative' is seen in terms of 'a profound change in consciousness in both the researcher and the researched' (Egbo, 2005, p268-9). As such this approach requires critical reflection, probing and questioning with some realignment of perspectives which hopefully in turn would act as a mediating force for social praxis. Whilst it was never going to be possible to go into significant depth in terms of the ontological and epistemological premises which formulate critical realism, what follows is my attempt to draw out the key tenets of critical realism, particularly in relation to the focus of this paper.

Key Tenets

1. Critical realists' believe that there is a world existing independently of our knowledge of it and therefore all knowledge is fallible.
2. Critical realists' believe that knowledge is transient and it is important to recognise that it is relative to the historical, social and political context in which it was produced.
3. Critical realists' view of social reality is that individuals both reproduce and transform social structures as well as are formed by them, whilst social structures both shape and place constraints on individuals but are also the result of continuous activity by individuals.
4. The critical realist view of human actions is that they may be associated with unacknowledged conditions, unintended consequences, the exercise of tacit skills and/or unconscious motivation.
5. Social structures are real things which have causal powers which may, or may not, be activated.
6. Critical realism recognises that because we are often shaped outside of our conscious awareness, it offers us a way forward through its emancipatory/transformational potential.

Disability: an unnecessary duality?

Whilst it is necessary to briefly explore the issues, from a critical realist perspective, around competing paradigms within an understanding of disability as this informs the discussion into special education and inclusion, it is beyond the scope of this paper to go into significant depth and analysis on this issue, although a number of other researchers have done so and I would refer you to them as a starting point (Barton, 1996; Low, 2006; Slee, 1998).

From looking at a range of literature into current practice and beliefs in disability it tends to argue for either the need to identify disability as within the individual so that appropriate interventions can be developed (Kauffman, 1999; Kavale & Mostert, 2005) or within societal structures and beliefs which create the disability rather than it being inherently within the individual (Barton, 1987; Oliver, 1986; Soder, 1989).

The individual or, as it is often referred to, medical model of disability believes that all the ensuing difficulties are within the individual and therefore their 'faults' need to be addressed in order to put these right. For many, this is what special education was founded on and continues to operate from this paradigm (Oliver, 1988; Tomlinson, 1985) with a medical diagnosis being required in many states in Australia to access special education services and funding.

Recently, there has been greater acceptance towards the social view of disability (Clark, Dyson, Millward, & Skidmore, 1995; Thomas & Loxley, 2001). This is at odds with the way special education has been and is structured and this will be explored in more detail in the next section. In relation to the social view of disability, some argue that 'difference is not a euphemism for defect, for abnormality, for a problem to be worked out through technical and assimilationist education policies, diversity is a social fact' (Armstrong, Armstrong, & Barton, 1998, p.34). Therefore

differences and diversity should be promoted and that we need to fully understand these in order to know what adaptations and changes are required to enable those with impairments to enjoy improved wellbeing and equality of access to educational opportunities.

In line with a critical realist view of causal relations, that there is a dual character to individuals and society; structure and agency, an increasing number of writers are starting to suggest that this duality is unhelpful in reality (Low, 2006; Norwich, 2002; Terzl, 2005). To exemplify this it could be seen that for those who would argue that the social view of disability is the totality of the interrelationship, the danger could become that if there is an absence of any specification of the concept of difference, how can difference be celebrated, and how can an appropriate educational experience be developed and provided.

Shakespeare (1993) amongst others argues that the social model of disability needs to be reconceptualised to include the experience of impairment (Lindsay, 2003; Norwich, 1993; Shakespeare, 1993; Terzl, 2005). Norwich (1993) believes that those who advocate the social model of disability can be contradictory in their arguments when they state that all the difficulty lies within society's inability to adapt itself to the characteristics of the child, whilst also demanding that there should be an interaction between the individual and the school. Indeed, from a critical realist perspective, it is only through the interrelationship between individual and society that transformation will be brought about. It is therefore proposed that a move away from the duality of views currently present within many of the fields of disability towards an acceptance of the causal relations between society and the individual is helpful in providing a way forward particularly in the fields of inclusion and special education to which I will now move.

Special Education V Inclusion

I have deliberately headed this section as special education versus inclusion as I think this is at the core of the difficulty in moving from where (special) education currently is to where I believe it needs to be. If the discussion remains, for some, at just the level of criticising the other view then I believe progress will be very slow as the focus is taken away from the key issue of how is a more inclusive education system developed.

Using a critical realist lens with which to review the literature in these fields there appears to be some issues at the forefront of the discussion which need to be unpacked further. There is the tenet that all knowledge is both fallible and transient and therefore context, both historical and social, needs to be examined. In relation to special education this will involve looking at its knowledge base and how, through another critical realist tenet; that of social structures having causal powers, new members are affected by its culture. Using the same tenets, I will then examine the literature around inclusion; how it has taken the moral ground and, the competing views as to how it should be realised. A final important element in this discussion is also the use or misuse of language that will lead into the beliefs and values (mechanisms) I see as operating in special education towards inclusion.

Viewing Special Education through a critical realist lens

Knowledge tradition of general education is grounded in psychology and scientific management which means its practices and discourses are predisposed to the belief that school organisations are rational and therefore school failure is a pathological condition. Therefore the issue lies in a problem within the individual and so education does not need to question its conventional practice. Special education could be seen to be an even more extreme version being strongly based on psychology, sociology and biology disciplines, where the focus is on diagnosis and intervention based on this and its strong links with behaviour theory.

Thomas and Loxley (2001) suggest that special education has always suffered an inferiority complex because it has no core beliefs and understandings itself and therefore has often borrowed its epistemological tenets and research methods from its more recognised allied disciplines of psychology and sociology. In doing so they have not critically examined them to see whether or not they are founded and appropriate, and this has become the prevailing view. They argue that psychologists and sociologists within the field of education have systematically 'outlawed' certain types of knowledge as not being scientific and value free, objective, and therefore not permissible.

In doing so they identify that knowledge in and around special education has become so compartmentalised by those academic disciplines that it would be a very brave set of practitioners who would dare to move outside the professional prevailing dominant view and the possible outcomes of doing so could amount to a form of 'professional suicide', and within this type of intellectual atmosphere it is unlikely that free thinking will occur.

This, from a critical realist perspective is unacceptable as a great deal of the 'knowledge' associated with the scientific disciplines would not be viewed as fallible, transient or related to context. As Swann (1985) contends 'Psychology and education are enterprises guided by radically different ground rules. Much confusion has been wrought, much of it unrecognised, by the failure to understand this' (cited in Thomas and Loxley, 2001, p.35). Therefore the knowledge that much of special education is founded on is not the 'truth' but instead fallible, from a critical realist perspective.

In addition to the knowledge gained through training to become a special education teacher, it is proposed that often the major influences on knowledge and 'truth' come from senior staff and peers when individuals first move into the 'practical field' of special education. Information and knowledge is 'received' at all times of life but I believe that the most powerful messages are 'received' once the individual is working in the field on a daily basis. Therefore the dominant culture of the setting will often have a significant impact on developing the individuals' views of what knowledge and truth in the 'real world' are. The role of induction into a profession can further entrench the views that have become 'truth' over time and are used to 'socialise' the new member into the profession once they have internalised the skills and knowledge deemed to be important (Mittler, 2000; Riddell, 1996; Slee, 2005).

The critical realist view suggests that we are often shaped outside of our consciousness and therefore the lenses through which information and knowledge are viewed are inevitably highly influenced by the prevailing culture of the group. As stated by Crotty: 'For each of us when we first see the world in a meaningful fashion, we are inevitably viewing it through lenses bestowed on upon us by our culture' (1998, p.54).

Also, by the very nature of the interaction between special educationalists and between special educationists and the 'system', powerful discourses can often take place to further embed the 'truth' as to what is and isn't reality for those operating within the system. As Thomas and Loxley say:

'The past hundred years have seen the development of mechanisms, procedures, measuring instruments and practices which have had the object of identifying and moving pupils into segregated forms of schooling. The notion that special education operates as a filtering device to render more manageable the majority of the system has now become part of the received wisdom of critical thinking about special education...' (2001, p.76).

Further to this idea, it is also apposite to mention the importance critical realism places on the social, political and historical context of knowledge development. Within the disability field this is supported by Barton (1999), who contends that education cannot be seen within a social and political vacuum and cites Sultana (1997) who states: 'schooling cannot be divorced from the wider social order, and schools and educators are not and cannot be 'neutral' and 'apolitical' channels for equally 'neutral' and 'apolitical' knowledge. Whatever we make happen in schools - constantly and inevitably - gives messages defining what it means to be 'human', 'good' and 'normal' in particular social contexts' (p.54). Slee (1998) and Skrtic (1995) would also endorse this understanding with the field of special education.

In relation to the historical context of special education there are competing views as to why it was established and why it continues in spite of the overwhelming support for the concept of inclusion. Whilst not agreeing with the concept, Tomlinson (1982), identified that many in special education would see its sense of itself as a profession as been premised on the liberal ideology of benevolent humanitarianism; the duty that a society has on caring for its weaker members. Many others believe that the continuance of special education is down to an attempt to maintain the status of the special education 'industry', teachers and administrators in regular schools (Fuchs & Fuchs, 2005; Fulcher, 1989; Slee, 2001). Slee (2001) is particularly self-critical of his time as a special educator as giving him more sophisticated methods and approaches aimed at promulgating special education and he was a 'card-carrying designator of disability' (p.171).

Tomlinson (1985) also talks about the expansion of special education as being linked to professional interests and refutes the suggestion that much of the expansion is down to accident, spontaneous adjustment, progress and benevolence. She cites Archer (1979) in affirming her belief that educational structures are a result of the interests of those social groups who manage education. In relation to special education educationalists, psychologists and medical practitioners all have a vested interest in expanding the numbers of pupils identified as 'special'. Those working in special education have an interest in increasing numbers as do mainstream teachers under the pressures of greater accountability as well as placing the problem with the child as opposed to their teaching. Thomas and Loxley (2001) believe the growth and maintenance of special education has been as much about expediency as oppression with a focus on the psychology of politicians, planners and administrators stating that to justify their position they need to identify problems and then provide visible solutions to these problems - just moving the funding into mainstream education to assist it in becoming more inclusive would be seen as an abdication of responsibility as it could not be seen: 'The special system is thereby geared toward providing visible 'services' designed to help' (p.43). From this brief look at special education and what it is founded on I will now turn to look at the literature and research on inclusion: the use of language and the competing views as to the way forward.

Inclusion

A number of researchers have noted that the use of language is very powerful in the debate around inclusion and in debating other potentially contentious issues (Slee, 1996; Watson, 2005). One of the problems that inclusion proponents face is the difficulties experienced in coming up with an agreed definition of inclusion. As the focus of this paper is on inclusion in relation to those with a disability the definitions explored are in relation to this also.

Definitions of inclusion are many and varied but amongst the more succinct ones are provided by Lipsky and Gartner (1996; 1999) who describe it in terms of students with disabilities having full membership of an age-appropriate class in their local schools with the required additional support aids and/or services. Skrtic, Sailor and Gee (1996), argue in a similar fashion that it goes beyond physical placement and also involves the schools meeting the needs of all children in common but variable environments and activities dependent on need. In identifying these two definitions it is important to say that they come from a different paradigm as to the way forward for inclusion and this is often seen as a weakness by those arguing against inclusion, but more of this later.

A potential difficulty, in terms of moving forward towards a more inclusive education system and away from the polarised discourses prevalent in special education and inclusion, is that proponents of inclusion have often taken a very moral stance in terms of why inclusion is good and special education is bad. In doing so, they have either alienated some of those who could potentially assist in the move towards a more inclusive education system or those who feel 'threatened' have 'adopted' the word in the name of reinvented special education practice (Slee, 1996). In doing so the word 'inclusion' has almost become unusable in any coherent manner. As Thomas and Loxley (2001) identify that the word 'inclusion' is now de rigueur on all mission statements, policy documents and political speeches and in doing so has now become a cliché which is obligatory in the discourse of all right-minded people.

Kauffman (1999) states that he believes the word inclusion has become virtually meaningless being used as a catch-word for a whole range of potentially opposite approaches, citing what Salman Rushdie has called 'the new incomprehensibility'. It is interesting that even those with some of the most strident views in relation to disability, such as Oliver (1996), note that the word inclusion may have had such success at an ideological level that it is almost impossible to examine it critically. From a critical realist perspective this is a problem because it is almost proposing that the 'truth' has been discovered and in doing so it suggests there is no future knowledge to be gained through our theoretical interaction with the world. I would concur, as nearly everyone would from a moral viewpoint, that inclusion would be a step forward from where education for students with disabilities currently is but I would reject that we need look no further from a theoretical viewpoint and instead just focus on implementing inclusion, as important as that is. For Thomas and Loxley (2001), inclusion 'is about providing a framework within which all children...can be valued equally' (p119), and it is to the issues of values and beliefs that I will move shortly.

As stated earlier there are a number of competing views within proponents of inclusion as to the way forward and there is also debate as to what should be the values and beliefs that drive this change. Many see inclusion as really about extending the comprehensive ideal in education, and therefore the strive should be more towards what does the education system need to look like in order to promote tolerance, diversity and equity (Ainscow, 1995; Carrington, 1999; Lipsky & Gartner, 2005b; Skrtic, 1991a; Slee, 2001; UNESCO, 2000) rather than the current focus on 'special educational needs' and all the difficulties and baggage that this terminology brings (Barton, 1987; Clark et al., 1995). Some writers also argue that education should be guided by democratic principles (Artiles, 2003; Lipsky & Gartner, 2005a; Nilholm, 2006; Skrtic, Sailor, & Gee, 1996) rather than any other factors currently in play such as the demands of the marketisation of education (Bines, 1995; Riddell, 2000).

Mitchell (2005) suggests that the rationale for inclusive education revolves around three main arguments; the first being that it is a basic human right and is linked to equity and democracy, supported by a number of other researchers (Clark et al., 1995; Nilholm, 2006; Slee, 2001); the second being a shift in emphasis from individual impairments to changes in the social context with schools focussing on required pedagogical changes, and the third that as there is no clear demarcation between those with and without disabilities, therefore there is no discrete identification that specific categories of students learn in different ways and so why separate provision. Exploring the rationale from a critical realist perspective, the first argument is one that critical realism would not have disagreement with being based on an emancipatory principle; the second has already been covered in that a critical realist view of the literature is more likely to support the interplay between individual and society rather than the potential of focussing just on a social context, and this is linked to the third point.

In terms of a way forward, Skrtic (1995) argues that the problem with inclusion is that it is based on naive pragmatism, which whilst it questions the models and theories that the current professional practice is based upon, it unreflectively accepts the assumptions, theories and metatheories that stand behind them. He, along with others, articulates a more radical need to restructure schools rather than just the focus on inclusion (Lipsky & Gartner, 2005a; Slee, 2001). Although on similar lines to Skrtic, less radical approaches to the organisational paradigm (Clark et al., 1995) have been proposed by some. These focus on working with schools as they currently are in order to bring about more inclusive practice (Ainscow & Kaplan, 2005; Carrington, 1999; Carrington & Robinson, 2004; Deppeler & Harvey, 2004; Forlin, 2004).

In spite of the excellent work of these researchers and practitioners there is still a long way to go in spite of inclusion being seen as an important philosophical stance, as is noted by Stainback & Stainback (1992) when stating; 'special' education has operated for so long, many schools unfortunately do not know...how to adapt and modify the curriculum and instructional programs to meet diverse student needs' (p.40). I intend to now explore the issues around beliefs and values of those within special education as I would contend that, in relation to inclusion, whilst hearts have mostly been won there is still much to be done to win heads. By exploring where people are 'coming from' there remains the chance of moving the discussion forward.

Beliefs and Values: or the arguments against inclusion.

As explored earlier, Bhaskar argues that human sciences are necessarily non-neutral and that beliefs and values impact on how individuals act (1989a). Furthermore he believes that unacknowledged (unconscious) motivators limit the individuals understanding of themselves, and therefore this is an important element to examine as well as potentially offering a way forward.

MacIntyre (1988) states 'to adopt a standpoint of a tradition thereby commits one to its view of what is true or false and, in so committing one, prohibits one from adopting any rival standpoints' (p 367). The same cannot be said to be true within the discourse around inclusion. Those who argue for special education either 'adopt' inclusion as their own through 'linguistic dexterity' whilst making very few changes to practice based on the medical-psychological model of individual deficit (Slee, 2001) or have the view of a good idea but not practical.

In spite of the almost overwhelming acceptance of the concept, if not the reality, of inclusion there are dissenting voices. Critics of inclusion often refer to ideology or rhetoric (Croll & Moses, 2000; Hornby, 1999; Wilson, 1999) and use these terms as inherent criticisms of inclusion as the

arguments for are not based on objective measures (Hegarty, 1993, 2001; Kavale & Mostert, 2005). Kauffman (1999) believes that history shows that without separate provision the interests of 'exceptional children' are not met, although he does not refer to any particular authors or studies. He also believes that social scientists have fallen into believing that a new idea is a way of developing their status within academia which has no facts to back it up.

Many of these arguments fall back to the already challenged, from a critical realist viewpoint, positivist stance on which special education is premised.

I want to, in line with a critical realist perspective, also acknowledge the way politics and policy can and do influence the context people are working in. It is beyond the scope of this paper to go through policies in terms of what they contain and how they have been enacted in settings but I believe it is pertinent to explore what has been found in a number of western industrialised countries that have policies to promote inclusive practice but who also promote a marketised educational environment. A number of researchers have found that the presence of marketisation of education can often lead to a segregationary impact and as such the presence of this alongside a push for inclusion may be mutually exclusive (Bines, 1995; Rouse & Florian, 1997).

An additional major issue in many current systems is that the terminology is often used as a 'gatekeeper' for additional resources rather than encouraging inclusive practices, and this is certainly an issue as schools are often financially penalised for being successful by resources being taken away if the individual 'improves'. This has had the negative impact of pushing the special needs debate towards a scramble for additional resources rather than a focus on the development of quality provision (Norwich, 1993).

Whether articulated or not these often impact on how people perceive what is being proposed and it is important to note that in enacting policies we ultimately bring our own interpretations to bear.

Bowe et al. argue: 'Practitioners do not confront policy texts as naive readers, they come with histories with experiences, with values and purposes of their own.' (cited in Thomas and Loxley, 2001, p.99). In relation to disability the social categorisation of individuals as being somehow 'special' is constructed in and legitimised through the kind of policies which are developed in this area. Policy is rarely neutral and the language used can and does influence how individuals and what is being promoted within the policy are viewed and enacted.

Conclusion

I would suggest that critical realism provides a possible way forward from some of the current entrenched positions that those arguing for or against inclusion can find themselves.

Critical realism clearly identifies its ontological and epistemological premises, unlike nearly all other writings. It also avoids the fallacy of homogeneity, where characteristics given to one group or setting are assumed to apply to individuals within that group. It maintains the unique context of each situation whilst exposing underlying mechanisms which may or may not be at play in other situations (Slee, 1998; Thomas & Loxley, 2001). Due to its explicit examination of values within knowledge it avoids the fallacy of value-free knowledge, where knowledge of educational institutions and systems is seen as value free.

Some are already operating along similar lines to critical realism when stating that they are not looking for theoretical closure but are looking for ever clearer explanations of complex realities in relation to what is happening (Slee, 1998). Thomas and Loxley (2001), also support this point when they refer to the danger of researcher's wanting to identify 'grand themes' to explain why children do not succeed or behave inappropriately, this leads to grand answers which fail to take account the individual circumstances at play and the context.

Using a critical realist framework to show that all knowledge is fallible and rooted within the historical, social and political contexts of the time it may provide an opportunity to move away from the potential 'finger wagging' that can take place by both sides of the discussion. It is proposed that by thinking about what might or should be the world can be shown as it currently is and all should be encouraged us to ask searching questions about what is currently so.

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