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Inclusive Education: “Same same but Different”. Examples from Guatemala and Malawi

Abstract

Inclusive education is a global paradigm implemented across a range of different local contexts. Inclusion is a manifold concept with several and ambiguous meanings. This article is based on a yearlong research project in Guatemala and Malawi and is exploring the question: What are the specifics of inclusive education in so-called developing countries at the example of Guatemala and Malawi. After a theoretical embedding we are presenting the research results on the above mentioned question. The results bring forth tensions in the concept and implementation of inclusive education.

Keywords: *Inclusive education, developing countries, Guatemala, Malawi*

Zusammenfassung

Inklusive Bildung ist zu einem globalen Paradigma geworden, das in unterschiedlichen lokalen Kontexten umgesetzt wird. Das Konzept Inklusion ist vielschichtig und ist in unterschiedlichen Definitionen gefasst. Dieser Artikel basiert auf einem einjährigen Forschungsprojekt in Guatemala und Malawi und untersucht die Forschungsfragestellung, welches die Spezifika von inklusiver Bildung in sogenannten Entwicklungsländern am Beispiel von Guatemala und Malawi sind. Nach einer theoretischen Einbettung werden die Forschungsergebnisse dargestellt. Durch die Ergebnisse werden Spannungsfelder im Konzept und in der Umsetzung von inklusiver Bildung deutlich.

Schlüsselworte: *Inklusive Bildung, Entwicklungsländer, Guatemala, Malawi*

Introduction: Notions of inclusion

Inclusion is a manifold concept with several and ambiguous meanings. Artiles and Dyson describe inclusion as “slippery concept” that means different things in different systemic, socio-economic and cultural contexts (2005, p. 43). This is explicitly true for different regions in the world, and there are diverse differences in implications between so-called developed and developing countries¹ (Srivastava, de Boer & Pijl, 2013; Armstrong, Armstrong & Spandagou, 2011). In the overall ambivalence and plurality of notions of the concept inclusion, Ainscow at al. offer a typology of the notions of inclusion (2006, pp. 15):

- inclusion as a concern with disabled students and others categorized as ‘having special educational needs’: this understanding is often centred around constructions of individual defects and the question of placement;
- inclusion as a response to disciplinary exclusion: this understanding targets students temporary or permanently excluded from schools due to ‘bad behaviour’;
- inclusion in relation to all groups seen as being vulnerable to exclusion: an increasing trend to work with this notion of inclusion can be observed and is often described as ‘broader perspective’;
- inclusion as developing the school for all: this notion is reflected in developments to abolish the allocation of students to different schools according to their attainment; according to the authors this notion is about “a mutually sustaining relationship between schools and communities that recognizes and values diversity” (ibid., p. 21);
- inclusion as ‘Education for All’: this notion has developed from global targets primarily focusing on participation in education in developing countries;
- inclusion as a principled approach to education and society: this approach is characterized by being concerned with all children and youth in schools and stresses the never-ending process of implementing inclusion.

This typology helps to understand different approaches to inclusion and the ambiguity that comes with it. Another categorization of the concept of inclusion used in research is provided by Göransson and Nilholm (2014), who identified four categories in a hierarchical relation. Without presenting them here in detail, it can be stated that the four categories are roughly compatible to the typology of Ainscow et al. and that they range from a definition concerned with placement to a definition looking at community development. Given the fact that the outlined plurality of notions is presented and elaborated mainly by authors from so-called developed countries, it appears worthwhile to consider the constructions and notions of inclusion in so-called developing countries and the specifics that come along with the example of Guatemala and Malawi.

In the following, we will explore the question of what specific characteristics define the understanding and implementation of inclusive education in developing countries like

Malawi and Guatemala. In doing so, we will draw on the results from our one-year research project.

Research project

Background: refie project

The Research for Inclusive Education in International Cooperation (refie) project² was conducted between 12/2013–02/2015 in the two countries Guatemala and Malawi. Teams of national researchers implemented the qualitative, multi-perspective design in close cooperation with an international research team.³ This publication focuses on one aspect of the overall research project. The comprehensive research results on success factors and barriers in the implementation of an inclusive education system in Guatemala and Malawi and notions of the concept of inclusion in both countries are presented at Werning et al. (2016).

Research countries

The fact that both Malawi and Guatemala are partner countries of the German development cooperation with regards to the education sector and the wish to have countries from different continents in the research project contributed to the selection of Guatemala and Malawi as reference countries by the contracting authority, Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH. Malawi is a landlocked country in Southern Africa which, compared to its neighbouring countries, is relatively small in terms of population and area. Ranked 174 out of 187 countries on the 2014 Human Development Index (United Nations Development Programme, 2014, pp. 159), Malawi is one of the world's poorest countries. It is a primarily agriculture-based economy with a largely rural population. The population comprises various ethnic groups with at least nine different home languages (Dickovick, 2014). In Malawi, a full cycle of primary education takes eight years (World Bank, 2010, p. 13; Ministry of Education, Science and Technology, 2015, p. 6). In its state-run primary schools, school fees were abolished in 1994, which led to an enormous increase in enrolment rates ever since (Inoue & Oketch, 2008). As in the rest of Sub-Saharan Africa, school dropout is a major issue: 64.5 % of students enrolled in the first grade (Standard 1) stay in school until Standard 5 and only 32 % of the age cohort stay in school until Standard 8 (Ministry of Education, Science and Technology, 2015, pp. 49).

Guatemala is a Central American country with a history of armed conflicts, the most recent of which lasted 36 years (1960–1996). Major causes of tension are inequity in the distribution of assets and capital, especially the distribution of land, and the discrimination of indigenous peoples (UNICEF, 2015). Guatemala ranks 125th on the Human Development Index and is thus classified as a country with “medium human development” (United Nations Development Programme, 2014). 40 % of Guatemalans identify themselves as indigenous people. There are 24 languages in the country, 21 of which are Mayan (Instituto Nacional de Estadística de la República de Guatemala, 2015a). A recent national survey indicates that 51 % of the population is younger than 20 years old (Instituto Nacional de Estadística de la República de Guatemala, 2015b). 59 % of Guatemala's primary schools are monolingual, with Spanish as the only language of instruction (Dirección de Pla-

nificación Educativa, 2014). Primary Education in Guatemala takes six years and is completed by 97 % of the students (Ministerio de Educación, 2013). 21 % of students in primary education are over-aged⁴ with a higher proportion of male students (23 %) than female students (19 %) (ibid.).

Both Guatemala and Malawi have signed and ratified the UN Convention on the Rights of the Child (United Nations Treaty Collection, n.d. a) and the UN Convention on the Rights of Persons with Disabilities (United Nations Treaty Collection, n.d. b).

Malawi and Guatemala have little in common despite their similar population size and although both are partner countries of German development cooperation. Malawi is in general a poor country; most of its population lives in extreme poverty. Guatemala is categorized as in average a country with medium human development, but there are enormous gaps between its rich and poor, indigenous and non-indigenous people – just to name a few. Therefore, it comes without saying that the described research results do not always apply equally to both countries. The results presented here are valid for both countries, but some aspects can be more distinct for one country than the other.

Research question and methodology

The research question we want to elaborate here is what specific characteristics there are in the understanding and implementation of inclusive education in the developing countries Malawi and Guatemala.

Data was collected at all levels of their educational systems through problem-centred interviews (Witzel & Reiter, 2012), focus group discussions (Lamnek, 1998) and participatory observations with different stakeholders of the educational system. Additionally, a document analysis (Wolff, 2008) focusing on existing country-specific research results, policy papers and practice papers was conducted for each country. The transcribed data was analyzed with thematic coding (Flick, 1996; 2004) and open coding (Strauss, 1994; Strauss & Corbin, 1996).

Research results

Inclusive education and special needs education

Our document analysis revealed the lack of a unanimous concept of inclusive education in the educational policy framework of Guatemala and Malawi. In both countries, the term inclusive education is used in relevant policy documents which, however, often reflect a traditional medical deficit approach towards providing special needs education. For example, many of the strategies to be implemented with regards to special needs learners mainly target students with sensory or motor impairment. Both national policy frameworks acknowledge various differences that can lead to marginalization or exclusion, but do not contain provisions addressing these target groups under the concept of inclusion. The notion of inclusion in the educational policy framework in Guatemala and Malawi is mainly the one Ainscow et al. describe as “inclusion as a concern with disabled students and others categorized as ‘having special educational needs’” (Ainscow, Booth & Dyson, 2006, p. 15). In the newly released National Strategy on Inclusive Education of Malawi this momentum is also perceived and

reflected by the authors, as it is stated that “the concept of inclusive education is often linked with children with disabilities in mainstream schools. However, the concept of inclusive education has a broader meaning and does not only refer to a single group of learners in an education system” (Ministry of Education, Science and Technology, 2016, p. 12).

Furthermore, the study showed that, there is neither a commonly shared concept of inclusive education among the major stakeholders in Malawi nor in Guatemala. Their perceptions range from a narrow understanding of disability inclusion to a broad understanding comprising the minimization of discrimination and the maximization of social participation and educational opportunities. The following quote from a Malawian educational administration authority shows how special needs learners are equated with learners with sensory or motor disabilities and how inclusive education is understood mainly as disability inclusion:

“The special needs learners, because they are of different disabilities – and others do not have the opportunity to see and we have others who have got hearing problems, others have got difficulties in mobility – we need to co-opt them into the system” (District Education Manager in a rural area of Malawi).

Conversely, another administration authority at the same system level in Malawi had a broader understanding of inclusive education, detached from a target group-specific approach and oriented towards reducing barriers to learning for all learners:

“We cannot talk of productive school environment looking at only a particular group of people, but rather its education for each and every one, so that whatsoever is taking place in productive school environment, we have to involve each and every one in whatever status one is, whatever condition one is in. We have to involve each and every one” (District Health and Nutrition Coordinator in a rural area of Malawi).

Drawing back on the above introduced typology of inclusion, this notion can be described as “Inclusion as developing the school for all” (Ainscow et al., 2006, p. 15). Another orientation was found in Guatemala where, traditionally, certain marginalized target groups have been addressed, resulting in the omission of others. This results in discussions about different target groups and considers inclusion in relation to all groups seen as being vulnerable to exclusion:

“But it is important to go beyond the indigenous and rural subject, because nowadays we are talking about a school that does not accept poor children who come from marginal areas or that turn these children into victims or unwanted persons within the school” (Academic, Guatemala).

Referring to the typology of inclusion it becomes apparent that no common understanding of the concept of inclusive education is shared between relevant stakeholders in education between all levels of either country. As the understanding of inclusive education in the main policy documents in Guatemala and Malawi used to be mainly linked to learners with special educational needs and disabilities, a broader variety of understandings of inclusive education is evident in the perspective of the stakeholders. In the currently developed National Strategy on Inclusive Education in Malawi this divergence is named for the first time and shows a critical appraisal

of the used concepts of inclusion. The divergence in the notions of inclusive education is not unique for Guatemala and Malawi. As Göransson and Nilholm (2014) and Ainscow et al. (2006) have outlined, different definitions of inclusion are also existent in the European context.

Inclusive education and inclusive society

As mentioned above, Guatemala is a country with a high proportion of indigenous people and a history of discrimination of indigenous groups. When addressing the topic of education of the indigenous population in Guatemala, the topics of home language and culture also become relevant. Study participants showed resistance towards using the concept of inclusive education in relation to indigenous population:

“So I think it is complicated to mingle the issue of disability with the issue of indigenous peoples, who are a majority in this country ... So I believe it is extremely complicated to mingle the ethnic theme with the disability theme. Because these are completely different issues; one is a problem related to the structural racism of this country, resulting in having the indigenous populations outside public services, in particular education, which is one of the basic structures of our country, sadly. So addressing this as a matter of exclusion seems, a lot, complicated to me. I would never mix the two” (Academic, Guatemala).

This statement shows the understanding of inclusion as a concern with disabled students and others categorized as “having special educational needs” (Ainscow et al., 2006, p. 15). In this perception inclusion is not concerned with indigenous peoples and not aiming at developing a school for all or even an inclusive society. Several stakeholders’ perception of inclusive education was linked or limited to disability and therefore incompatible with a discourse on inclusion of indigenous population into the education system. This makes it clear that unsolved societal conflicts and unrealized social inclusion issues have a direct impact on the implementation of inclusion in the education sector. A segregated society renders inclusive education *ad absurdum*.

The topic of indigenous people in Guatemala fundamentally challenges some presuppositions of the international discourse on inclusion. In Guatemala, people raised questions of whether inclusion is desirable for everyone and whether it can collide with human rights issues:

“The concept of inclusive education has shades. When introducing for example the topic of inclusive education and indigenous peoples, there are deterrents, because here we have individual and collective rights, language rights. Up to what point can I use inclusion? There could be a certain desire for autonomy: I do not want to be included or integrated. I want to have my own system. The concept of inclusion could clash with the issue of rights” (Representative of an international organization, Guatemala).

Certain groups (such as the indigenous groups in this case) might demand a ‘right to exclusion’ if, for instance, they prefer to have their own educational system with cultural-specific content and language. In any case, the topic of indigenous people in Guatemala reveals drastically how inclusion in education cannot be considered apart from a country’s profound societal structure:

“Being a racist country, inclusion begins in part by understanding the country’s cultural diversity. Including someone different from my culture, my language, my way of thinking and of behaving, means that I need to respect, it means I need to be tolerant, but the National Education System has done the opposite. It has been an eminently excluding education system” (Leader of Teachers Union, Guatemala).

These aspects were explicitly located in Guatemala – a country where most of the population identifies itself as indigenous people who historically experienced many repressions; another group is the co-called ‘Ladinos’, who are of Spanish descent. The population of Malawi is also composed of various ethnic groups who to some extent speak different languages. However, our research results from Malawi did not show the above-mentioned aspects that we identified in Guatemala.

Formal education and living environment

The relation between formal education and the respective living environment became relevant in both countries. However, this aspect has different impacts in the two countries. Our study revealed that, in both countries, formal education is often only partially relevant and suitable given the living environment of the majority of the population. Especially in Guatemala, the contents of formal education seemed only partially or to a certain extent relevant to the living environment of the students, as displayed in the following quote:

“The parents say: ‘What I want is for my child to learn to add, subtract, multiply and divide, because that will already generate an income since I will be able to put him to work in a store’” (Departmental Officer, Guatemala).

One explanation might be the divergence of expectations from realizations regarding the benefits of formal education for entering the labour market. When formal education doesn’t keep the promise of improving someone’s living conditions, it is losing its value in the perspective of some students and parents:

“Sometimes parents don’t want their children to study because of the work situation. Because there isn’t much work, they conclude their studies and there is no work; they graduate and there is no work; even some are professionals and there is no work. Only a few are working and the majority just stays at home” (Local leader, Guatemala).

The implied promise of formal education is to improve a person’s living conditions and to enable his or her participation in society. Inclusive education reinforces the latter as it aims at nobody being excluded from societal participation. If formal education itself does not keep these promises, how could inclusive education?

In Malawi traditional orientations and practices can compete with the requirements of formal education. In certain regions in Malawi traditional initiation ceremonies are influencing the children’s attendance at school. These initiation ceremonies may last several days or weeks and are leading to school absence. Initiation ceremonies are of relevance for both boys and girls. As the analysis shows, though, consequences differ according to gender. Girls are more likely to drop out of school after attending these rites, as they are encouraged to be sexual active with the results of early pregnancies and early marriages:

“Especially when they go to initiation ceremonies. I don’t know what is going on there. But after coming out of

initiation ceremonies, they drop out of school. Some are impregnated and get into marriage and the like” (Vulnerable children coordinator in a rural area, Malawi).

One consequence of initiation ceremonies for boys can be rebellious behaviour after their return to school. They are more likely to get into conflict with teachers as they perceive their role differently after being initiated, bearing consequences for their participation:

When children go for initiation ceremony, they are told they are adults, so we meet problems that when that child comes to school, and we have rebuked him or her for a bad behaviour ... so such beliefs affect children because they develop that feeling that they are adults and a teacher cannot do anything to them. (Teacher in a rural area, Malawi)

In these cases, traditional structures compete with the value of formal education.

Presence of donor organizations

As a consequence of low national income, countries like Guatemala and Malawi receive financial and technical support from bi- and multilateral donors. The presence of donor agencies funded through organizations or other governments is characteristic of developing countries and has its own dynamics. The overarching aim of governmental development cooperation is to support national institutions. However, this occurs under the influence of financial power intentions and with the priorities of international agencies, which inevitably have their influence on national processes. In the perspective of many stakeholders in both countries the presence of several donor agencies come with demarcation and competition, as stated in the following:

“What I would like to say is to avoid little islands of success in the big ocean of failure: [name of organization] is signing its own success story, [name of organization] its own success story in one little district. I call this islands of success by attribution to each agency, but in a big ocean of failure.” (National Stakeholder, Malawi).

Furthermore, donor agencies have their own internal logics and procedures. Most interventions have a fixed and medium-term timeline. However, national developments such as the development of the education sector happen on a different time scale. As a result, development cooperation projects might be leaving gaps after project termination, as displayed in the following quote:

“However, I regret these [initiatives by donor agencies] are all temporary, ok, because their scope is large and the public sector and public resources can’t be compared to the resources brought by organizations, and when these are cut or they conclude, the people who were working with them stay, the demand remains” (Departmental Officer, Guatemala).

Donor agencies run the risk of functioning like a repair service, working on a short- or medium-term intervention timelines in the most urgent issues. The presence of several donor agencies who might be interested in distinguishing themselves can add to this problem and lead to fragmented approaches in the lack of a coherent joint strategy.

“There is a little bit of working silos approach than across the sector, everyone protecting their turf: [name of organization] doing their own thing, [name of organization] doing

their own Early Grade Reading, [name of organization] doing their own ... thing. How can we come at the table and come up with one inclusive education strategy for Malawi, where everyone contributes not everyone protecting their own little turf?" (National Stakeholder, Malawi).

Discussion and outlook

Before reflecting the specifics of inclusive education in the two countries, it is worth underscoring that the global movement of inclusive education has different roots in developed and developing countries. The development of inclusive education in developed countries can be traced back to the 1960s and 70s (Artiles, Kozleski, Dorn & Christensen, 2006, p. 69) and has mainly emerged from a critique of the placement of certain learners outside the mainstream. Inclusive education in developing countries has been promoted through the Education for All agenda which firstly and primarily focussed on increasing access to school education. The Dakar Framework for Action stresses that Education for All can only be achieved through inclusive education (UNESCO, 2000, p. 14). Therefore, the Education for All agenda transfers the concept of inclusive education (which is grounded in experiences from developed countries) to the goals and requirements of developing countries. From this genesis it can be stated that – breaking it down – inclusive education in developed countries was originally about being educated in a special system or the regular system whereas inclusive education in developing countries often is a question of being in school or out of school.

Our research results revealed several tensions regarding the concept and implementation of inclusive education in Guatemala and Malawi. The various tensions are outlined below.

- *Tension between special needs education and inclusive education:* This tension in itself is not specific for developing countries but carrying an own characteristic in developing countries as the experiences and the discourse from developed countries spill over to developing countries with a shorter history in inclusive education.
- *Tension between human rights and inclusion:* In many discourses, human rights form a thrust towards the development of inclusive education (Dyson 1999). However, in Guatemala a 'right to exclusion' is demanded by indigenous people. The question whether human rights can form tension towards inclusive education might be discussed controversially.
- *Tension between traditional values and inclusive education:* Especially in Malawi, it became evident that in certain regions, traditional values do not match the requirements of formal and inclusive education and, consequently, there are two different competing orientations. In Guatemala and Malawi, we also saw how the promise of education of economic prosperity and social participation remains unfulfilled. Therefore, inclusive education which takes up the promise especially of social inclusion becomes elusive.
- *Tension between fragmented interventions and holistic development:* The presence of different donor agencies fortifies fragmented interventions whereas inclusive education is based on a philosophy of a comprehensive education. Inclusion raises fundamental questions regarding the deve-

lopment of the educational system and educational institutions, which cannot be solved by short-sighted stopgap measures. However, the conditions in poor countries often impede long-term development.

Tensions as a characteristic of pedagogical practice have been widely discussed (Helsper, 1996) in developed countries. It is even argued that tensions are a specific phenomenon with regard to inclusive education (Slee, 2009). Such tensions can be considered as an inevitable part of pedagogical practice and cannot simply be dissolved. Inclusive education might highlight and intensify difficulties and tensions which have been present throughout. We maintain that the contextualization of inclusive education should take existing tensions into account.

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Notes

1 Categorizing countries as 'developed', 'developing' or 'under-developed' is highly problematic. The question is: What is meant by 'development' and who is judging the progress of this development? Nevertheless, because the terminological alternatives (such as countries of the Global South/North) for describing inequalities between countries of the world are also unsatisfactory we still use the debatable term 'developing/developed countries' while acknowledging the limitations of this classification (see also Engelbrecht/Artilles 2016).

2 Research project implemented on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ), as mandated by Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ), Leibniz Universität Hannover, the Institute of Education for Special Needs, and GOPA Consultants.

3 Members of the Guatemala research team: Marta Caballeros, Héctor Canto, Magaly Menéndez, Cristina Perdomo, Gerson Sontay. Members of the Malawi research team: Dr. Grace Mwinimudzi Chiuye, Anderson Chikumbutso Moyo, Evance Charlie, Dr. Elizabeth Tikondwe Kamchedzera, Lizzie Chiwaula. International researchers: Prof. Dr. Rolf Werning, Myriam Hummel, Prof. Petra Engelbrecht, Prof. Alfredo Artilles, Antje Rothe.

4 Over-aged students are defined by the Guatemalan Ministry of Education as those who are two or more years older than the age regarded as the ideal for the grade (Ministerio de Educación, 2013).

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