HAS THE POLICY WINDOW CLOSED? A CRITICAL ANALYSIS OF SOUTH AFRICA'S INCLUSIVE EDUCATION POLICY

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Abstract

To assess whether the policy window opened by *White Paper Six* (WP6) has closed, this article traces the historical path of the policy and reviews pertinent policy documents and research to date on inclusive education in South Africa. Two research questions are explored: 1. What is the present state of inclusive education for students with disabilities in South Africa? 2. What factors facilitate or inhibit the understanding and implementation of WP6? Results reveal a negative state of inclusion in present day South Africa based on teacher, student, and parent attitudes towards the policy and disability. Furthermore, many barriers and few facilitators of inclusion were found. The analysis concludes by making policy recommendations and posing alternatives.
Keywords: educational policy; inclusive education; disability; South Africa

Introduction

In the policy process, when critical elements come together, a "policy window" opens and the opportunity for social change is borne (Kingdon, 2010). In the case of inclusive education in South Africa, global and local conditions were ripe over ten years ago for the creation of a national policy to facilitate the inclusion of students with disabilities. Turning to the present day, this policy analysis aims to determine the extent to which this policy window remains open by tracing the historical path of the policy and evaluating research to date on inclusive education in South Africa. To further introduce the policy under analysis, this paper will identify the policy problem, describe the policy, examine its global and local origins, and then specify the policy analysis objectives and research questions. The theoretical framework and methods employed in the policy analysis will then be presented, followed by results for each research question. Finally, these findings will be discussed in terms of implications, recommended policy alternatives, and limitations.

Policy Problem

Studies in South Africa have found that if students with disabilities attend school at all, it is most

common for them to go to separate special schools historically segregated by disability and race (Jafthas, 2008; Naicker, 2005; Soudien & Baxen, 2006). This is especially true for students with severe disabilities, because school attendance for them depends on the availability of special schools (Muthukrishna, 1996). Special schools are separate schools that exist outside of mainstream education and are designed to cater to the unique learning needs of students with disabilities. Herein lays the continued challenge of service provision, because special schools do not exist in every community.

In fact, not all students with disabilities attend school in South Africa. Although statistics are sparse, insight on the proportion of out-of-school children with disabilities can be gained from the 2008 South African Department of Basic Education (DBE) Education for All (EFA) country report. In this report data was presented on how many students were currently being served, which amounted to 88,000 students in 400 special schools in 2008. This number of students represents a mere 0.64% of the total student population, ranging from 0.28% in Limpopo and Mpumalanga to 1.65% in Gauteng provinces (DBE, 2008a). Using World Health Organization benchmarks, DBE (2001) estimated that there were between 293,000 and 346,000 children with disabilities in the country, representing 2.2% to 2.6% of the overall population. This means that as many as 258,000 children with disabilities, or 1.96% of the entire population, were excluded from the education system. Further evidence illustrating the lack of access to education for students with disabilities is provided by Muthukrishna (2002), who states that 70% of children with disabilities in South Africa are out of school. Additionally, Statistics South Africa (2005) found that 30% of those with a disability had no education, while only 13% of those without a disability had no education. This means that individuals with disabilities have been more than twice as likely never to attend school. Although there are inconsistencies in percentage estimates, it is clear that students with disabilities are not universally enrolled in school.

In addition to low school enrolment and attendance, research has shown that students with disabilities do not stay in school as long as peers without disabilities. For example, Loeb et al. (2008) showed that the mean level of education is significantly lower among those with disabilities in the Eastern and Western Cape regions (3.5 and 2.9 years, respectively) compared to their non-disabled counterparts (4.5 years in both the Eastern Cape and Western Cape). On the whole, the general message gained from existing data is that children with disabilities in South Africa are not being provided with a free and compulsory primary education, so change is needed. This general situation, which still continues today, gave rise to the policy known as *White Paper 6: Special Needs Education* (WP6). WP6 was first introduced in 2001, and it still has yet to be realized; the policy has been mostly symbolic in nature, and the powerful mechanisms that are impeding its progress need to be uncovered and confronted. The following section describes the policy in detail.

Policy Description
WP6, released by the DBE in July of 2001, stands as the most recent key policy document that has made special education and inclusion the subject of state attention in South Africa. This national policy document commits South Africa to an inclusive education and training system, with the primary goal of expanding access and provision across the nation for students with disabilities. WP6 defines inclusive education and training as:

- Acknowledging that all children and youth can learn and that all children and youth need support.
- Enabling education structures, systems and learning methodologies to meet the needs of all learners.
- Acknowledging and respecting differences in learners, whether due to age, gender, ethnicity, language, class, disability, HIV or other infectious diseases.
- Broader than formal schooling and acknowledging that learning also occurs in the home and community, and within formal and informal settings and structures.
- Changing attitudes, behaviour, teaching methods, curricula and environment to meet the needs of all learners.
- Maximizing the participation of all learners in the culture and curriculum of educational institutions and uncovering and minimizing barriers to learning. (DBE, 2001, p. 6-7)

To fulfil this vision of inclusion, WP6 outlines key strategies focused on restructuring the education system for learners identified as having special educational needs. It is important to note that the institutional restructuring in WP6 does not include abolishing special schools. Instead, the vision is that special schools will serve students who require "high-intensive educational support," and will take on the new role of functioning as "resource centres" in the district support system. Further, learners who require "low-intensive support" will attend "ordinary" schools, and those who require "moderate support" will attend "full-service" schools. WP6 envisions full-service schools as providing for the full range of learning needs of all students, and serving as models of inclusion for other schools to replicate. Initially, the policy stipulates that 500 of the 20,000 primary schools in South Africa should be converted to full-service schools, and 30 school districts should establish "district-based support teams" (DBSTs) to provide coordinated professional support to teachers.

For more details, see Figure 1 for a visual representation of the theory-in-action of South Africa's inclusive education policy. Based on my interpretation of the policy document, this theory represents how the DBE envisions the process of WP6 implementation (i.e., how the policy is expected to work). A 20-year implementation strategy is outlined in WP6, consisting of immediate to short-term steps (to take place in 2001-2003), medium-term steps (2004-2008), and long-term steps (2009-2021), to meet the overall goal of establishing an inclusive education and training system. Short-term steps include a national advocacy program and an outreach program to mobilize out-of-school children with disabilities, as well as an audit of special schools. Additionally, in 30 school districts, short-term steps involve the conversion of 30 special schools to resource centres and 30 primary schools to full-service schools, plus the creation of DBSTs to orient management and professional staff to the inclusion model and to establish early identification procedures in primary schools' foundation phase (grades reception to three). Medium-term steps include transforming higher education institutions to accommodate students with disabilities, expanding community outreach programs, and expanding the number of resource centres, full-service schools, and DBSTs. Long-term steps include further expansion to 380 resource centres, 500 full-service schools, and colleges and DBSTs.

WP6 also outlines a 20-year funding strategy to support implementation. This funding strategy takes a three-pronged approach, relying on conditional grants from the national government, a

reformulation of provincial education department budgets, and the mobilization of international and national donor funding. Modified identification and assessment practices for students with disabilities, as well as recognition of the consequences of the curriculum and the impact of the HIV/AIDS pandemic, are also mentioned in WP6.
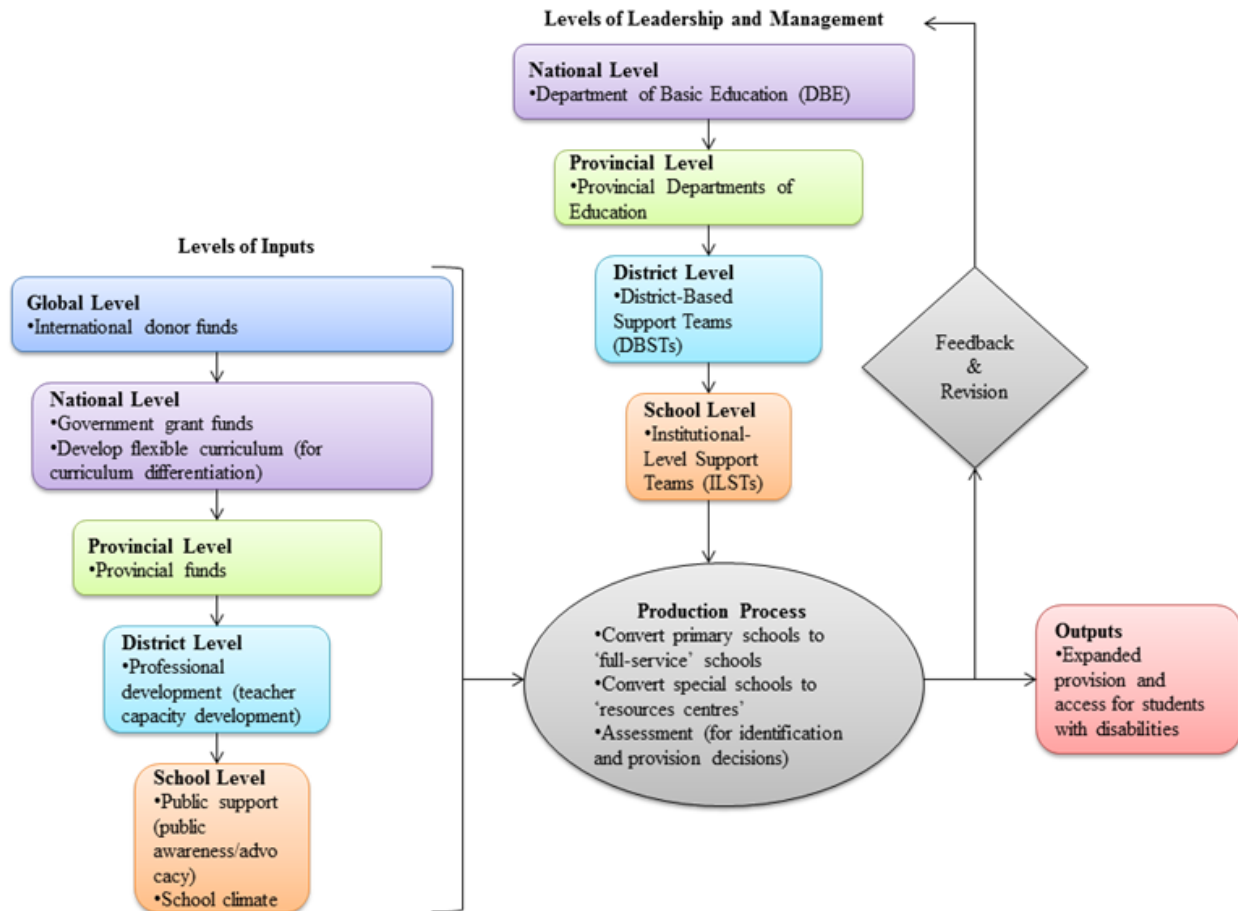

Figure 1. Theory-in-action of WP6. Adapted from Resnick et al. (2007).

Further explanation regarding how WP6 is expected to work is provided by supplementary policy documents that have been released by South Africa's DBE subsequent to their 2001 WP6 publication. Such documents, in chronological order, include the Guidelines to Ensure Quality Education and Support in Special Schools and Special School Resource Centres (DBE, 2007), National Strategy on Screening, Identification, Assessment and Support (DBE, 2008b), Guidelines for Inclusive Teaching and Learning (DBE, 2010a), and Guidelines for Full-Service/Inclusive Schools (DBE, 2010b). The goal of these policy documents is to provide more concrete details regarding how WP6 can be implemented effectively. Together, this list of supplementary policy documents illustrates that there appears to be an ample amount of policy discourse around inclusive education in South Africa, but whether these documents effectively alter the educational practices for students with disabilities is another matter.

Global and Local Policy Origins
From a global perspective, the development of WP6 was a response to international imperatives for universal access to education set forth by the EFA movement. This movement began in

Jomtien, Thailand, in1990, when the World Declaration on Education for All was first adopted by representatives from 155 countries and 150 organizations at the World Conference on Education for All (UNESCO, 2011). Participants pledged to provide basic education for all children, youth, and adults by the year 2000, taking a rights-based approach to education supported by the Universal Declaration of Human Rights and the Convention on the Rights of the Child. Then, on April 26-28, 2000, in Dakar, Senegal, the participants of the World Education Forum reaffirmed their commitment to the achievement of EFA goals and adopted the Dakar Framework for Action, Education for All: Meeting Our Collective Commitments.

Another relevant international event that influenced the development of WP6 occurred in 1994 at the UNESCO World Conference on Special Needs Education, held in Salamanca, Spain. In the spirit of EFA, and in considering the future international direction of special education, the conference focused on access and quality to ensure the rights of children with disabilities to receive a basic education. This impetus was spelled out in the Salamanca Statement and Framework for Action for Special Needs Education. Surrounded by these global forces working to increase awareness and intervention efforts targeting access to education for all students, including those with disabilities, South Africa was faced with the challenge of providing free and compulsory primary education to its children with disabilities.

Locally, WP6 was created within a social and political context that was full of change and transition. In April 1994, the African National Congress (ANC) political party won the first democratic nationwide election in South Africa's history, and Nelson Mandela was inaugurated as president in May 1994 (Nuttall et al., 1998). There was a wave of reform when Mandela took office to reverse the oppressive Apartheid policies of the previous National Party government and to create a new South Africa - a rainbow nation at peace. This wave of change spanned all spheres of society, from industry to healthcare, housing, water, public works, taxes, trade, land reform, education, and so on. Within this policy climate promoting equity for all South Africans, WP6 was born.

During Apartheid post-1994, the South African Education Department was divided into 18 racially separated education departments, each of which had their own special education policies. In this fragmented system, extreme disparities between different race groups existed in the provision for learners with special needs, with black children with disabilities having virtually no provision (Engelbrecht et al., 1999). This history of marginalization and exclusion of learners with disabilities was investigated and addressed in October, 1996, when South Africa's Ministry of Education appointed a National Commission on Special Needs in Education and Training and the National Committee on Education Support Services. WP6 was then released by the DBE in July, 2001; it built on a joint report produced by these two bodies in 1997, as well as on a Consultative Paper released by the Ministry in 1999, based on the report's recommendations.

Policy Analysis Objectives and Research Questions
Through reviewing available empirical literature and policy documents, the primary objective of this policy analysis was to evaluate whether the policy window that was initially opened by WP6 over a decade ago remains open today. In other words, the aim of the analysis was to determine whether the policy's potential to create social change in regards to the education of students with disabilities in South Africa has been realized. In order to more fully understand WP6

implementation progress, this article also explores which factors seem to impede and facilitate access to education and service provision for students with disabilities in South Africa. Multiple factors were considered in this analysis of facilitators and barriers to WP6 implementation, such as budget allocation, teacher training, professional development, and the nation's curriculum and exam structure. Doing so uncovered the true capacity of teachers and schools to carry out the extensive aims of WP6, as well as identified some areas for policy makers to address as they move forward with inclusion efforts. Consequently, this article addresses the following research questions: 1. What is the present state of inclusive education for students with disabilities in South Africa? 2. What factors facilitate or inhibit the understanding and implementation of WP6? The primary motivation for exploring these questions was to identify possible alternatives that policy makers can pursue to increase the responsiveness of policy to the needs of this marginalized group.

Theoretical Framework
This policy analysis draws on theories of globalization, governance, and institutions for its theoretical framework. First, the forces of globalization are important to recognize in the policy analysis of South Africa's WP6, because international forces are no doubt at play in the nation's policy arena. In our global world, there exists an environment of policy borrowing regarding educational policy and practice (Tatto, 2007). Previous work has established that the inclusive education movement is no exception to this policy borrowing environment (e.g., Graham & Jahnukainen, 2011; Le Fanu, 2013; Lynch et al., 2011), especially with international multilateral organizations like the United Nations advocating for inclusive education reform globally. Thus, couching the policy analysis of WP6 within a globalization frame is important, given the international pressures and influences to shape and inform inclusive educational policy and practice.

Second, acknowledging the role of local governance is also important in this policy analysis, because within the greater international context nation states play a critical role in mediating global influences. When considering international relations and comparative politics, the regulatory role of the state is undeniable in the promotion of economic and social development (Kjaer, 2004). Nation states and their educational systems respond to global pressures by making critical decisions concerning whether to adopt, borrow, or modify international policies. Applying this framework to my WP6 South African policy analysis, it is important to consider how the global mandate promoting inclusive education was first adopted by the national DBE, and then how it has filtered down to the provincial and local levels. At each level of government, different formal and informal rules, behavioural codes, and norms (i.e., governance, as defined by Kjaer) exist. The ways in which such governance impacts the implementation of WP6 is explored in the current policy analysis.

Third, it is important to use institutional theory because the state has as its counterpart local educational institutions such as the DBE, provincial departments of education, and local districts that must implement the policy. The definition of institutions provided by Cummings (1999) will be used: "Institutions are comprised of complex norms and procedures oriented towards realizing a particular goal or ideal, and they motivate behaviour towards these goals or ideals" (p. 413). Applying this definition to the present policy analysis, the particular goal or idea is increased access to primary education for students with disabilities, as specified by WP6. In

order to implement this policy effectively, the educational institutions of South Africa must establish norms and procedures to make WP6 a reality. Cummings noted that one of the core principles of institutions of education is that new thinking may emerge in times of rapid ideological, political, or economic change, and this can lead to educational reform. The process of changing educational institutions is a lengthy one, because institutions have mechanisms to buffer themselves from external influence. As a result, the important role of institutions of education as mediators of policy cannot be overlooked.

In sum, applying this multi-dimensional theoretical framework permits a greater understanding of how global, governmental, and social institutions govern special education policy in the contemporary South African context. The release of WP6 has institutionalised inclusion in South Africa, thereby opening a policy window and creating an opportunity for greater equity for students with disabilities. Applying the above theoretical framework will enable an evaluation as to whether the opportunity originally provided by the policy is being realized.

Method
To answer the research questions, a combination of government reports on WP6 implementation and of empirical journal articles on inclusive education for students with disabilities in South Africa were reviewed. The data sources and analytical approach are explained below.

Data Sources
Government reports. The two South African DBE evaluations of the implementation of WP6 include The Report on Implementing Inclusive Education in South Africa, which was presented to the DBE in 2008, and The Report on the Inclusive Education Field Test, which was presented to the Heads of Education Committee in 2009. To the best of author's knowledge, these are the only reports evaluating WP6 implementation that have been published by the DBE to date.

Journal articles. To identify relevant journal articles on the topic of inclusive education for students with disabilities in South Africa, a systematic search in the ERIC FirstSearch database was conducted using the keyword "South Africa" and the subject headings "inclusion" or "inclusive schools" and "disabilities" or "special education." The search was limited to include only peer-reviewed research articles as the publication type. This initial search produced a total of 36 articles. Nineteen studies were dropped from the analysis because after further review it was determined that they were not empirical studies, and/or the inclusive education of students with disabilities in South Africa was not a central topic. This brought the final sample to 17 peer-reviewed articles. A detailed list of the relevant studies that were reviewed in this policy analysis can be found in Table 1 in the Appendix, which provides descriptive information on their research objectives, sample, data collection methods, and findings.

Analytical Approach
When analysing the government reports and journal articles, the two research questions and theoretical framework were used as a guide to extract and interpret pertinent information from the data sources. As such, any text from the data sources that discussed WP6 implementation or barriers and facilitators of inclusive education in the South African context (i.e., research question relevant content) was highlighted and then subsequently coded to identify key themes and findings. Applying the theoretical framework, the extracted key themes and findings were

then interpreted and critiqued with an eye towards the potential roles of globalization, governance, and institutions. Finally, as part of the analysis for RQ1 articles were coded as having largely positive, negative, or mixed findings or implications in relation to WP6 implementation.

Results
Results are presented for each of the two research questions below.

RQ 1: Evaluating WP6 Implementation Efforts
The findings of the government reports revealed that WP6 implementation has not been as smooth or as fast as originally anticipated (DBE, 2008c, 2009). Some specific observations and recommendations to highlight from the reports include: collaboration at the national level was not effectively mirrored at the provincial level, monitoring and evaluation systems need to be developed, planning needs to be more systematic, provincial financial resources need to be coordinated to upgrade school infrastructure and materials, and teacher capacity needs to be improved in order to scale up implementation.

It was more difficult to determine what the present state of inclusive education for students with disabilities in South Africa is from the articles reviewed, because only two of the studies (Dreyer, 2013; Kalenga & Fourie, 2012) empirically evaluated WP6 implementation[1]. Instead, the vast majority of the articles examined perceptions of inclusive education and attitudes towards students with disabilities in South Africa. Of these, most articles examined the perceptions of teachers (Bornman & Donohue, 2013; Engelbrecht et al., 2003; Forlin, 1997; Greyling, 2009; Helldin et al., 2011; Magare et al., 2010; Malinen et al., 2013; Mdikana et al., 2007; Ntombela, 2011; Oswald & Swart, 2011; Savolainen et al., 2012), one looked at the perceptions of parents (Yssel et al., 2007), and two examined the perceptions of students with disabilities themselves (Francis & Muthukrishina, 2004; Ntshangase et al., 2008).

When interpreting the results of these studies as a whole, there appears to be a majority of negative and mixed findings. Figure 2 shows the proportion of positive/negative ratings across all articles (see last column in the Appendix for positive/negative ratings of each article). Only 3 articles presented generally positive findings, 8 had a combination of positive and negative, and 6 had negative, suggesting that the state of inclusive education in South Africa is relatively poor overall.

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[1] Dreyer (2013) examined the experiences of learning support teachers as they adapt to their new roles in inclusive schools and Kalenga and Fourie (2012) evaluated how mainstream schools are managing the inclusion of students with disabilities.
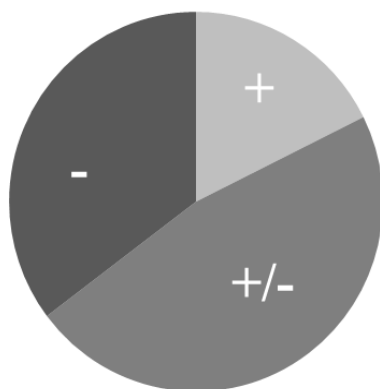
Figure 2. Proportion of articles whose findings have positive, mixed, and negative implications for WP6 implementation

To highlight some of the negative findings, research showed that South African teachers perceived many stressors and concerns with an inclusive classroom (Engelbrecht et al., 2003; Oswald & Swart, 2011; Savolainen et al., 2012), have a limited understanding of what inclusive education is (Ntombela, 2011), and do not believe that inclusion can work or recognize its value (Greyling, 2009; Helldin et al., 2011). There was also evidence of a perceived lack of support for general education teachers to include students with disabilities in their classrooms (Greyling, 2009). Furthermore, it is important to point out that both articles that empirically evaluated WP6 implementation fall into the negative category, with Kalenga and Fourie (2012) finding that school management in mainstream schools lack direction and scope, and Dreyer (2013) showing that despite the ILST structure, learning support teachers experience many challenges as they try to implement inclusive education such as limited cooperation from general education teachers.

On the other hand, the handful of articles with generally positive findings suggest that South African teachers can have positive attitudes towards inclusive education (Mdikana et al., 2007) and have competencies that enable them to support learners with disabilities (Magare et al., 2010). However, it is important to note that although Mdikana et al. found that the majority of pre-service teachers (60%) had positive attitudes towards inclusive education, 35% expressed negative attitudes, and while 35% is technically the minority, it is still a relatively large proportion and is problematic.

It was most common for articles to present a combination of positive and negative findings, such as Francis and Muthukrishna (2004) who found that students generally felt positive about their inclusion but also reported negative consequences like bullying and discrimination. Similarly, parents positively reported that inclusion had increased their involvement in their child's education, but they still experienced many frustrations, such as alienation, empty promises, and concerns for their child's social rejection (Yssel et al., 2007).

So while the government reports and articles with negative findings paint a relatively bleak picture of inclusive education in South Africa, the articles with mixed or positive findings offer some light. However, it should be reiterated that the bulk of these findings rely on perceptions of

inclusion, and more experimental work testing the effectiveness of inclusive education and the progress of WP6 implementation in South Africa is clearly needed in order to fully assess the present state of inclusion.

RQ2: Identifying Factors that Facilitate and Inhibit WP6 Implementation
Many barriers to inclusive education in South Africa are expressed by the government reports and articles reviewed. The five most common barriers identified in the literature reviewed are summarized in Table 2.

Table 2. Common Barriers to Inclusive Education in South Africa

Barrier	Number of Data Sources Barrier was Identified	Data Sources
Lack of teacher capability and confidence in the classroom	8	Engelbrecht et al. (2003), DBE (2008c, 2009), Greyling (2009), Helldin et al. (2011), Kalenga & Fourie (2012), Malinen et al. (2013), Ntombela (2011)
Lack of teacher training	5	Bornman & Donohue (2013), Forlin (1997), Greyling (2009), Ntobela (2011), Yssel et al. (2007)
Lack of financial and material resources	4	Engelbrecht et al. (2003), DBE (2008c, 2009), Greyling (2009)
Lack of direction and scope in school management	4	DBE (2008c, 2009), Dreyer (2013), Kalenga & Fourie (2012)
Negative beliefs/attitudes of teachers, fellow students, and society at large	4	Bornman & Donohue (2013), Muthukrishna (2004), Greyling (2009), Yssel et al. (2007)

Table 2 shows that the barriers identified in the reviewed articles and government reports span across multiple levels of the educational system from students to teachers to school management and even beyond to the society at large in terms of their negative beliefs about disability and attitudes towards the inclusion of learners with disabilities in mainstream classrooms. The barriers also span multiple levels of local and national government, as evidenced by a lack of direction and scope of school management regarding inclusion at local levels and a lack of financial resources and materials, where national government plays a role in educational finance distribution decisions. Finally, systemic barriers in teacher preparation were also commonly discussed in the literature in terms of a lack of teacher training in inclusive pedagogy and a lack of teacher capability and confidence in inclusive classrooms. Overall, the literature shows that numerous cultural, social, economic, and political barriers impede the successful implementation of inclusive education in South Africa.

Unfortunately, due to the emphasis in the literature on barriers, very few articles offer a better understanding of what might facilitate WP6 implementation. That being said, there is a couple of notable exceptions whose lessons learned from successful cases of inclusion will be briefly summarized. One such article is Magare et al. (2010), which reported that educators who are effectively carrying out inclusion have skills and competencies like acceptance, adaptability, and flexibility, and they were able to collaborate well with teachers and parents. Additionally, the study by Pather (2011) provides a positive case of inclusive education, focusing on how staff, peers, parents, and neighbouring schools addressed barriers to inclusion, such as creating a lift club to address transportation challenges. It is important to point out that this case was inclusion by default, meaning that the school was not actually designated as a full-service school by WP6 standards. So, while Pather's study illustrates that inclusion can be possible in a South African school, in so doing it illuminates flaws in WP6 because the ways in which inclusion was achieved did not follow the policy's theory in action. Future work studying why successful cases of inclusive education are a success, like the two reviewed here, will be vital to inform continued policy implementation.

Discussion and Implications
Moving forward, the literature reviewed implies that numerous institutional barriers need to be addressed in order to bring about the desired policy effects of WP6. One important area to target within the larger education system is teacher training institutions. Teacher training programs should be strengthened to address the lack of preparation and the low confidence that teachers have to teach students with disabilities. Regarding the specifics of such programs, there are some inconsistencies in the South African literature. For example, the findings of Forlin (1997) suggest that an elective special education course unit is more desirable than a compulsory unit on special education in terms of producing lower levels of discomfort that teachers have with people with disabilities, yet the findings of Oswald and Swart (2011) suggest that gains can be made with compulsory courses. Further research is needed to determine what an effective teacher training program should look like in South Africa to inform decisions about how to address the teacher training gap in the area of inclusive education.

An additional structural barrier to address is the lack of financial and material resources. Depending on the particular needs of the child, students with disabilities may require additional learning resources, such as audio/visual equipment, furniture, or books. A related concern regards the severe inequalities in the South African context. Although the articles reviewed did not focus on this, in the South African context it is clear that some schools are more resourced than others, and this is usually closely related to race. Taking into account this context of severe inequality, particular attention should be paid to resourcing schools that serve disadvantaged students in South Africa's educational funding plans.

A final major barrier to address is the negative beliefs/attitudes of teachers, general education students, and the greater community. While this was commonly cited as a barrier to policy implementation and the articles noted that cultural attitudes need to be changed, they did not describe how this could be done, or suggest viable policy alternatives incorporating an attitude changing component. Although social attitudes towards disability are likely the most difficult thing to change, sensitivity training is one viable option. Due to the widespread nature of negative beliefs/attitudes, sensitivity training could take place in teacher training programs, in in-

service programs, in the community, and in the classroom for peers. When attempts are made in this area, caution should be taken to respect and honour traditional cultural beliefs as much as possible. For example, beliefs surrounding witchcraft surfaced in a couple of the articles (Francis & Muthukrishna, 2004; Greyling, 2009), with teachers and students believing that those with a disability are bewitched or *ukuthathwa*. As an alternative to directly challenging these beliefs, a more culturally sensitive approach would be to use another cultural idiom. *Ubuntu* is a South African philosophy guiding individual moral action drawing on the adage, "A person is a person through other people" (Ashforth, 2005, p. 85). The idea that personhood is constituted through community with others promotes harmonious community relations, which could reduce oppression and promote social acceptance of disability. Applying this concept of African humanism to disability could be useful as an entry point to get individuals to see that every person in the community is important and should be valued. When using such an approach, however, it is important to stress that using superstitious beliefs as a shield to discriminate against those with disabilities is not acceptable.

Recommended Policy Alternatives
The evidence presented in this article suggests that WP6, in its current form, is not very effective, so I recommend two policy alternatives. The first relates closely with Research Question 1, which aimed to evaluate the state of inclusive education in South Africa. Perhaps one of the reasons that a limited number of studies have thoroughly addressed this question is that the desired policy outcomes are not clearly defined. Returning to the theory-in-action represented in Figure 1, the outcomes section is quite vague. Redefining and establishing concrete, clear, measurable policy objectives would be useful in moving WP6 implementation forward so that progress can be more easily evaluated. Further, incorporating formative and summative evaluation procedures and appointing institutional bodies to carry out such evaluation of the WP6 implementation plan will add an important accountability component that is currently missing from the policy. The government WP6 implementation evaluation reports also recommended that monitoring and evaluation systems need to be developed (DBE, 2008c, 2009), and the value in doing so cannot be understated.

A final, more drastic policy alternative is to overhaul the entire inclusive education policy and start anew, this time creating better alignment with local needs and values. A resounding message from the literature reviewed is that many negative attitudes towards disability and inclusive education exist in South African society. WP6 is controversial in nature because of the social and cultural context, and there appears to be resistance to change, by teachers especially. If these negative attitudes are shaping the institutional norms and practices in local schools, it is unlikely that the inclusive education policy initiative will ever move forward. Perhaps the global pressures promoting inclusive education resulted in the policy getting off on the wrong foot. Research has established that so called "policy borrowing" eventually undermines any effort for reform because the impetus comes from the outside (Tatto, 2011). When policy is created in this way (i.e., from the outside in) it is in effect a surface level commitment on the part of the national government to show that South Africa is on the global wave of inclusion policy, but it does not impact the population in need. For this reason, I recommend policy inquiry locally. For inclusive education to infiltrate all levels of government and all educational institutions, the system requires drastic change. I believe that the best way to do this is to start at the local level to ensure sustainable change that has a true impact on the lives of students with disabilities in

South Africa.

Limitations
A primary limitation of the present study is the limited amount of peer-reviewed articles that the findings were drawn from. A call for more research on inclusive education in South Africa, especially regarding the status of the implementation of the policy, is warranted. Due to this lack of research, conclusions regarding Research Question 1 were limited because they were primarily based upon studies examining perceptions. While perception research is important, it should be coupled with studies aiming to quantify South Africa's progress towards inclusive education. Accordingly, it is important for future research evaluating WP6 implementation to incorporate a variety of outcome measures that explicitly quantify the production process outlined in the policy. For example, research should collect and report statistics on how many special schools have been converted to full-service schools, how many special schools have been converted to resource centres, how many districts have fully functioning district-based support teams, how many schools have established institutional-level support teams.

A second limitation is the rigor of some of the peer-reviewed studies used in this policy analysis. A surprising proportion of the journal articles reviewed did not adequately explain their sampling procedures or their sample characteristics, thereby calling into question the representativeness of their samples and validity of their findings. For example, Yssel et al. (2007) described their sample as 32 South African parents of students with disabilities from urban school districts in the Western Cape and Gauteng provinces; however, demographic information such as socioeconomic status and racial composition of the parents or the schools their children attended was not provided. Providing this level of detail is contextually important given the racially and economically stratified post-apartheid South African society. A related detail to consider in light of South Africa's unique history is the type of school due to the educational inequalities left behind by apartheid. For instance, former Model C schools, where only white children were previously permitted to attend, are much different in terms of material and teaching resources, class sizes, and school climate compared to schools formerly reserved for coloured or black students.

Other scholars, such as Deacon et al. (2010), have also acknowledged issues of generalizability when reviewing educational research in South Africa. Deacon stated that education research in South Africa was "in the main, diffuse, individualistic and on a small scale, with a dearth of large-scale research projects that could consolidate knowledge about issues of national and global importance" (p. 96). The findings of the present literature review fall in line with Deacon's sentiment – that more large-scale, generalizable research projects are warranted. Future research should take special care to ensure that sampling procedures and characteristics are sufficiently explained so that generalizability can be adequately assessed.

Conclusion
This policy analysis was based on a critical assessment of peer reviewed scholarship on inclusive education in South Africa, and it contributes to documenting the need for rigorous studies on policy development and implementation in this important policy area. Two research questions were explored: 1. What is the present state of inclusive education for students with disabilities in South Africa? 2. What factors facilitate or inhibit the understanding and implementation of

WP6? Results revealed that few of the 17 peer-reviewed articles empirically evaluated the effectiveness or implementation of WP6 directly. Instead, the majority of articles documented the perceptions and attitudes that teachers, students, and parents have towards the policy and disability more generally, to paint a generally negative picture of the state of inclusion. Given the resources allocated and the real need for inclusive education in South Africa, it is irresponsible not to know what impact the policy is having on a large scale; consequently, more rigorous research is needed in this area. Results for the second research question revealed that many barriers and few facilitators of inclusion are reported by the studies, once again adding to the bleak picture of inclusive education in South Africa.

Given this negative state of inclusive education in South Africa, it appears that the policy window originally opened in 2001 when WP6 was released has begun to close. This lack of progress must be denounced and a call for action made, because inclusion in education is a matter of social justice (Polat, 2011). Attempts to overcome structural barriers that create educational inequality for students with disabilities are essential to create and defend a socially just and caring education for all students. Recommendations were made to address not only the identified barriers in systematic, culturally sensitive ways, but also to focus future research on the reasons behind cases of successful implementation, in order to move forward in a positive direction. Finally, policy alternatives were suggested to redefine WP6 outcomes in clear, measurable ways, as well as to promote future policy inquiry locally into the process of policy implementation. Doing so could enable better monitoring of progress and increased accountability, plus increase the likelihood that students with disabilities are being served by the South African education system in a sustainable, socially supported way. Inclusive education is an important educational policy objective for South Africa to continue to work towards to ensure that all children have access to education. To reopen this policy window, strengthening the policy itself as well as its implementation will help guarantee that children with disabilities are afforded their right to education.

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APPENDIX

Table 1. Features of Empirical Studies Reviewed

Study	Objective	Sample Description	Data Source	Primary Findings	+ or -
Bornman & Donohue (2013)	Compared teachers' attitudes towards including a learner with attention-deficit and hyperactivity disorder (ADHD) to a learner with little or no functional speech (LNFS)	118 teachers from 12 randomly selected government primary schools (3 rural schools, 3 urban schools, and 6 schools bordering the urban and informal settlement area) in the Kimberley area in the remote Northern Cape province	Modified Teacher Attitude Scale questionnaire that measures teachers' attitudes about inclusion after given two vignettes (one depicting a learner with ADHD and one with LNFS)	Although teachers reported that the learner with ADHD would be more disruptive in class and have more of a negative effect on the classroom climate, they overwhelmingly favoured including a learner with ADHD over LNFS. However, teachers felt that they could benefit from inclusive education training if either learner was in their class and additional training in inclusive education was positively related to teachers' attitudes about their ability to teach both learners in the vignettes	+/-

Dreyer (2013)	Explores the experiences of learning support teachers as they adapt to their new role providing collaborative provision of learner support in conjunction with the ILST and general education teachers	41 learning support teachers serving 63 schools in the West Coast District in the Western Cape Education Department (WCED) completed questionnaires and 6 learning support teachers participated in a focus group interview	Questionnaire with closed and open-ended questions to elicit quantitative and qualitative data on teacher views about the implementation and functioning of the learning support model in the school, as well as focus group interview to explore teachers' opinions on inclusive education and the learning support model	Support for mainstream teachers is fragmented; while 44% of learning support teachers reported often providing support to mainstream general education teachers, 17% gave no support. Although the ILST provides a structure for collaborative provision of support, learning support teachers experienced very little cooperation from general education teachers and felt that serving more than one school impedes collaboration	-
Engelbrecht et al. (2003)	Investigated the stressors on teachers when including a learner with an intellectual disability in South African mainstream classrooms	55 teachers from Gauteng and Western Cape provinces who included a learner with a mild to moderate intellectual disability in their mainstream classroom completed survey and 10 of these teachers were interviewed (5 from each of the two provinces)	Quantitative questionnaire on stress and coping, and qualitative structured interviews on teacher perceptions of stressors within an inclusive classroom	Five areas were identified as most stressful: administrative issues (responsibility for educational outcomes of student with a disability, adapting curriculum and unit plans to meet student's needs), support (financial constraints, difficulty locating appropriate resources), behaviour of learners (short attention span, poor communication, inappropriate social behaviour), self-perceived confidence (lack of training, difficult to sustain active learning environment for student with a disability while teaching students without disabilities), and parents of learners with intellectual disabilities (limited contact, lack of involvement)	-
Forlin (1997)	Investigated pre-service teachers' acceptance of and social interaction with people with disabilities	2,800 pre-service teachers from 6 teacher training universities in Queensland, Australia and the Western Cape, South Africa	20-item Interactions with Disabled Person Scale and 12 accompanying items about demographic characteristics	The levels of discomfort for those who had completed a compulsory unit on special education were higher than those who did not, while those who had taken an elective special education unit had lower discomfort than those who did not	+/-
Francis & Muthukrishna (2004)	Explored the subjective reality of students with disabilities attending an ordinary school	10 students with physical disabilities enrolled in a rural secondary school in the province of KwaZulu-Natal	Narrative methodology; collected personal stories of students to examine their life experiences and self-identity	Students felt positive about their inclusion, found most teachers and students supportive, and felt the school was trying to address their needs. However, students reported that bullying did occur regularly, some social relationships initiated by	+/-

			using unstructured interviews	able students were for financial gain because they collect a disability grant, students and community members perceive them as not normal and bewitched, the curriculum is exclusionary, and a major barrier to access was transportation to and from school	
Greyling (2009)	Explored factors educators who teach learners with special education needs perceived as problematic to them providing quality education for all, especially in lower socio-economic areas	Convenience sample of teachers at 12 mainstream and special primary schools in the Nelson Mandela Bay (Port Elizabeth and surrounding areas) and the Mtala district of the Eastern Cape province	Qualitative questionnaires, interviews, and observations of teachers on attitudes and beliefs about inclusion practices, rendering support to special education learners, confidence regarding implementation, and availability of support systems and personal commitment	Educators had limited knowledge regarding inclusion, little or no training in special education, felt in-service workshop training was insufficient, experienced a lack of support, and did not believe inclusion could work or recognize its value	-
Helldin et al. (2011)	Compared attitudes between South African and Swedish teachers regarding inclusive education	Purposive sample of 442 Swedish and South African teachers. South Africa sample: 65 teachers randomly selected from four schools in Gauteng province selected to represent urban/rural and mainstream/special schools, and 100 teachers in the province of KwaZulu-Natal attending a teacher's conference in Port Shepstone, with 100% response rate. Also sent 251 questionnaires to all final-year students in Advanced Certificate in Education: Inclusive Education at the University of South Africa, with 84% response rate. Sweden sample: 275 teachers within the educational organization in the rural region of Delarna, with 47% response rate.	Translated and adapted versions of a questionnaire on attitudes on inclusive education	Swedish teachers were more pro-inclusion and more hesitant to accommodate learners with barriers in special schools. Teachers from both countries were hesitant towards the feasibility of implementing inclusive education practically	-
Kalenga & Fourie	Explored the extent schools	Purposive sample of 40 Senior Management Team	Qualitative interviews, field	Mainstream schools lacked direction and scope in managing the inclusion	-

(2012)	are able to manage inclusive education implementation in mainstream classes and what eco-systemic management strategies should be employed	(SMT) members, 40 educators, and 40 parents in the Vaal Triangle (District 8 of Gauteng province)	notes, and observations	of learners with academic and behavioural challenges. Eco-systemic management strategies were recommended for the DoE, SMTs, educators, and parents.	
Magare et al. (2010)	Explored the experiences of educators in ordinary schools regarding the challenges experienced in inclusive learning contexts and identified the competencies they use to deal with these challenges	Purposive sample of 7 educators at a secondary school serving predominantly black and coloured people in North-West province	Qualitative case study of written assignments, in-depth interviews, and focus group discussion	Educators had competencies that enabled them to support the learners (unconditional acceptance, focused observations, adaptability, and flexibility) and formed collaborative relationships with parents and colleagues in an inclusive setting	+
Malinen et al. (2013)	Tested a model for explaining teachers' perceived self-efficacy for teaching in inclusive classrooms	1911 in-service teachers from China, Finland, and South Africa. Convenience sampling was used in South Africa, with one group of teachers (n=322) from the Vaal Triangle area in the Gauteng and Free State provinces and a second group of teachers (n=283) from across all South African provinces	Teacher Self-Efficacy for Inclusive Practices questionnaire, which measures perceived teacher efficacy to teach in inclusive classrooms	Experience in teaching students with disabilities was the strongest predictor of self-efficacy in all countries. In the South African model, experience teaching students with disabilities as well as previous interactions with persons with disabilities significantly explained self-efficacy, while teaching experience and the amount of training related to inclusive education did not	+/-
Mdikana et al. (2007)	Investigated pre-service educators' attitudes towards inclusive education	22 pre-service educators in their final year of study at the University of Witwatersrand in Johannesburg	Adapted questionnaire on attitudes towards inclusive education and learners with special education needs, and requirements for competency and successful inclusion	Participants were found to have positive attitudes toward inclusive education (60% positive, 35% negative, 5% undecided) and learners with special needs (77% positive, 27% negative, 16% undecided). The majority of participants (72%) felt there is a need for special skills and special resources, while 28% did not and 2% were undecided	+
Ntombela (2011)	Investigated teachers' experiences and understandings of the WP6 policy statement	42 teachers and 2 principals at 3 primary schools (1 rural, 1 urban, 1 semi-urban) in 2 districts in the province of KwaZulu-Natal, 60% response rate for teachers	Qualitative, multiple case study using questionnaires and focus group interviews with	Teachers had limited experiences and understandings of inclusive education and felt inadequately prepared to implement it	-

			teachers and individual interviews with principals		
Ntshangase et al. (2008)	Explored adolescent perceptions of their abilities, attributes, and feelings of self-worth while attending an inclusive school	29 adolescent boys (14 without a learning disability who have always attended a mainstream school and 15 with a learning disability who had previously attended a special school) attending an inclusive private school in an affluent Johannesburg suburb	Culture Free Self-Esteem Inventory Third Edition (CFSEI-3) survey	Found no significant difference in self-esteem subscales or global self-esteem between included and mainstream boys, showing the benefit of inclusion to self-esteem	+
Oswald & Swart (2011)	Explored pre-service teachers' attitudes and concerns regarding inclusive education and their degree of comfort interacting with people with disabilities after completing compulsory inclusive education courses	180 pre-service teachers from a South African higher education institution	Sentiments, Attitudes and Concerns about Inclusive Education (SACIE) scale	After the intervention, pre-service teachers' mean scores on the sentiments and attitudes scales increased, while mean scores on the concerns scale decreased. Regarding concerns, teachers were more worried about resources to support inclusive education, large class sizes, their workload, and the majority reported not having considerable interactions with a person with a disability.	+/-
Pather (2011)	Explored the inclusion, support provision, perceptions, and barriers of students with disabilities at a local secondary school	9 students with physical disabilities at a Black rural secondary school, their teachers, and nondisabled peers	Qualitative interviews with students with physical disabilities, observations over 6 months, and interviews with staff and nondisabled students	Despite not being designated as a full-service school, learners with disabilities were successfully being included within the mainstream school by default with a range of teacher, peer and community support	+/-
Savolainen et al. (2012)	Compared pre-service teachers' attitudes and self-efficacy in implementing inclusive education in South Africa and Finland	Convenience sample of 319 South African primary and secondary education teachers from the Vaal Triangle area and 822 Finnish primary and secondary education teachers from 6 small to medium-sized municipalities in Eastern Finland and 1 big municipality in South-West Finland	Sentiments, Attitudes and Concerns about Inclusive Education (SACIE) scale	Sentiments were positive in both countries, but teachers had concerns about including students with disabilities. Self-efficacy in managing behaviour was the most positive aspect of self-efficacy for South African teachers, but the weakest for Finnish teachers. Self-efficacy, particularly efficacy in collaboration, was positively related to attitudes	+/-
Yssel et al (2007)	Compared the perceptions of	32 parents of children with disabilities in urban school	Focus group discussions	Parent perceptions, experiences, and barriers to effective family-school	+/-

parents regarding inclusion across South Africa and the U.S.	districts in the Western Cape and Gauteng provinces of South Africa and 10 parents in 2 districts (1 urban and 1 urban/rural) in a U.S. Midwestern state	regarding inclusive education (6 held in South Africa and 2 in the U.S.)	partnerships and parent advocacy were remarkably similar in both countries. Major themes included: parents' rights (alienation and empty promises), parental advocacy (actively involved), social aspects (concern for child's social acceptance), general education teachers (lack training and experience), general education students' acceptance (attitudinal barriers, concern of child's rejection), and having a child with a disability (diagnosis and labelling frustrations, public's ignorance of disabilities)