

Chapter 1

Introduction

Background

This book is the fourth in a series published by the OECD on students with disabilities, learning difficulties and disadvantages.¹ It follows on from earlier work in the area and describes the continuation of a process intended to improve the quality and international comparability of the data available. In this way policy making in the field of education for disabled and disadvantaged students will be better informed.

Earlier work in the area had revealed the difficulty in comparing data in special needs education among countries. Two outstanding problems were identified. First, the term “special needs education” means different things in different countries. In some it covers only children with traditional disabilities, while in others it includes a broader range of students covering, for instance, disability, learning difficulty and disadvantage. Second, because of the wide variations in the definitions of disability and learning difficulty which are in use, the extent to which quantitative estimates for any particular category from different countries are comparable remains unclear. Furthermore, there has been in special education circles particular concern about the lack of educational utility of descriptive categories which are derived from medical classifications. Disability categories are viewed as having only partial implications for educational provision or for the development of teaching programmes, which inevitably have to take the whole child into account. In this way, therefore, categories based on medical descriptions are at best of only limited value to education policy-makers.

In 1997, the International Standard Classification of Education (ISCED) was revised. In the original version of the classification, special education was defined as the education provided in special schools, a definition wholly out of keeping with both theory and practice in many countries.

The most recent version of ISCED (ISCED 97) attempted to put this right and provides the following definition of special education:

Special needs education – Educational intervention and support designed to address *special educational needs*. The term “special needs education” has come into use as a replacement for the term “special education”. The older term was mainly understood to refer to the education of children with disabilities that takes place in special schools or institutions distinct from, and outside of, the institutions of the regular school and university system. In many countries today a large proportion of disabled children are in fact educated in institutions of the regular system. Moreover, the concept of “children with special educational needs” extends beyond those who may be included in handicapped categories to cover those who are failing in school for a wide variety of other reasons that are known to be likely to impede a child’s optimal progress. Whether or not this more broadly defined group of children are in need of additional support depends on the extent to which schools are able to adapt their curriculum, teaching and organisation and/or to provide additional human or material resources so as to stimulate efficient and effective learning for these pupils (UNESCO, 1997).

It is clear that this definition substantially changes and updates the definition of special education – particularly in terms of resources made available – and it carries with it a requirement for a rather different operationalisation for the purposes of gathering statistics.

From special educational needs to disabilities, learning difficulties and disadvantages

Given the above context, the term “special educational needs” is not used in this monograph except where necessary for historical reasons. Instead the words disabilities, difficulties and disadvantages are used. These terms broadly describe the students² for whom countries make additional resources available so that they can access the curriculum more effectively.

In addition, in order to facilitate policy-making the data gathered on these students are presented separately for the following three cross-national categories: students with disabilities, difficulties and disadvantages (the categories are fully defined later in the chapter). Although some features are in common, there are a number of issues that do not apply across all three categories; for instance, those relating to the inclusion of disabled students into regular schools.

The resources-based definition

All OECD countries provide additional resources to help students with disabilities, difficulties and disadvantages access the curriculum and benefit as fully as possible from education. Further analysis of how these resources are used and for whom and to what ends becomes key to understanding whether education systems are as equitable as they should be. It is towards illuminating this goal that the data collection on students with disabilities, difficulties and disadvantages is directed. Given the very different approaches taken by member countries of the OECD, it is an area which should benefit from international comparisons.

Students with disabilities, difficulties and disadvantages were therefore identified through a supply-side approach based on resources made available. This approach has the advantage of being educationally based and at the same time fits with the intent of the ISCED 97 definition.

Thus, the definition of special needs education agreed is that “those with special educational needs are defined by the additional public and/or private resources provided to support their education”. The use of this definition in a consistent manner calls for agreement about the term ADDITIONAL and an appreciation of the various kinds of possible RESOURCES PROVIDED which should be considered.

“Additional resources” are those made available over and above the resources generally available to students who are unlikely to have particular difficulties in accessing the regular curriculum.

Resources can be of many different kinds. Examples are:

- PERSONNEL RESOURCES. These include a more favourable teacher/student ratio than in a regular classroom where no allowance is being made for students with special needs; additional teachers, assistants or any other personnel (for some or all of the time); training programmes for teachers and others which equip them for work in special needs education.

- **MATERIAL RESOURCES.** These include aids or supports of various types (e.g. hearing aids); modifications or adaptations to the classroom; specialised teaching materials; etc.
- **FINANCIAL RESOURCES.** These include funding formulae which are more favourable to those with special needs (including classes where it is known or assumed that there are students with special needs); systems where money is set aside for special educational needs within the regular budget allocation; payments made in support of special needs education; and the costs of personnel and material resources.

One result of the resources approach is that it brings together students with special educational needs arising from very different causes, and it was recognised that a group formed in this way would itself need to be further sub-divided. To achieve this, a tri-partite categorisation system was devised based on perceived causes of difficulty in accessing the regular curriculum. Countries are asked to re-classify the data into this framework based on the classification and data collection arrangements used in their own national system following the operational definitions provided.

Operational definitions of cross-national categories³

The three agreed cross-national categories are referred to as “A/Disabilities”, “B/Difficulties” and “C/Disadvantages” respectively.

Cross-National Category “A/Disabilities”: Students with disabilities or impairments viewed in medical terms as organic disorders attributable to organic pathologies (e.g. in relation to sensory, motor or neurological defects). The educational need is considered to arise primarily from problems attributable to these disabilities.

Cross-National Category “B/Difficulties”: Students with behavioural or emotional disorders, or specific difficulties in learning. The educational need is considered to arise primarily from problems in the interaction between the student and the educational context.

Cross-National Category “C/Disadvantages”: Students with disadvantages arising primarily from socio-economic, cultural, and/or linguistic factors. The educational need is to compensate for the disadvantages attributable to these factors.

The present edition focuses primarily on the data provided by countries for the academic year 2002/03 and presents analysis and discussion based on these data. In addition, it contains a chapter examining trends in the data over the period 1999 to 2003 and a chapter on the participation of students with disabilities, difficulties and disadvantages in PISA 2003. More specifically:

- Chapter 2 provides an analysis of the qualitative data.
- Chapter 3 provides a comparative analysis of quantitative data based on categories used nationally to identify students who are in need of additional resources to help them access the curriculum.
- Chapter 4 provides an analysis of quantitative data for cross-national categories A, B and C.
- Chapter 5 provides an additional analysis of the quantitative data, including gender and age distributions.
- Chapter 6 provides analysis of the trend data for the years 1999, 2001 and 2003.
- Chapter 7 presents a study that examined the participation of DDD students in PISA 2003.

- Chapter 8 looks in more detail at the issue of over-representation of male students receiving additional resources for disabilities, difficulties and disadvantages.
- Chapter 9 provides a general discussion and conclusions.

The electronic questionnaire

As in previous rounds of data collection, an electronic questionnaire was used to gather data on students with disabilities, learning difficulties and disadvantages, thus allowing the development of a database, and of a methodology and technology compatible with the general education statistics work undertaken by OECD. It was put together to take account of the wide variety of national systems in use which was highlighted in the initial phase of the research and comprises:

- **Table 0** which requests information on any categories of students which are considered to fall within the resources definition and their classification into cross-national categories A, B or C.
- **Table 1** which asks for information on the starting and ending ages of various stages of education.
- **Table 2** which asks for information on the number of students with special educational needs in special schools, on the institutions (public and private), numbers of classes and on the teaching staff.
- **Table 3** which asks for information on the number of students with special needs in special classes, on the institutions (public and private), numbers of classes and on the teaching staff.
- **Table 4** which asks for information on the number of students with special needs in regular classes, on the institutions (public and private), and numbers of classes.
- **Table 6⁴** which asks for information on all students enrolled in special educational programmes classified by age as well as on those not registered in the education system.

In addition, information on total numbers of students in each level of education, including compulsory, is requested as well as gender breakdowns.

The nature and sources of the database for this monograph

The following 17 OECD countries and provinces and one non-member economy submitted quantitative data for 2003: Austria, Belgium (Flemish Community and French Community), the Czech Republic, Finland, Germany, Greece, Hungary, Japan, Luxembourg, Mexico, the Netherlands, the Slovak Republic, Spain, Switzerland, Turkey, the United Kingdom (England) and the United States and Chile.

The data are provided by national authorities from databases already gathered in countries for administrative purposes. The work reported has benefited from close collaboration between the OECD/CERI Secretariat and country representatives and the data presented are therefore as accurate as possible.

Because it has not yet proved possible to use the programmatic definitions of the ISCED levels, the terms pre-primary, primary, lower secondary and upper secondary are used as proxies for ISCED levels 0 to 3.

Data limitations

Despite increasing agreement about the cross-national definitions and growing adherence to these definitions among countries when allocating their individual country categories, there remain some divergences. Work is continuing on harmonising international reporting of these data. For example, the allocation of national categories to cross national categories A, B and C is permanently under review. Work is also continuing to provide full data sets on all national and cross-national categories. New work based on local data gathering has been initiated for this purpose.

Symbols for missing data

Five symbols are employed in the tables and graphs to denote missing data:

- a* Data not applicable because the category does not apply.
- m* Data missing.
- n* Magnitude is either negligible or zero.
- x* Data included in another category/column of the table.

Country name abbreviations⁵

Australia	AUS	Italy	ITA
Austria	AUT	Japan	JPN
Belgium (Flemish Community)	BEL (Fl.)	Korea	KOR
Belgium (French Community)	BEL (Fr.)	Luxembourg	LUX
Canada (Alberta)	CAN (Alb.)	Mexico	MEX
Canada (British Columbia)	CAN (BC)	Netherlands	NLD
Canada (New Brunswick)	CAN (NB)	New Zealand	NZL
Canada (Saskatchewan)	CAN (SK)	Norway	NOR
Chile	CHL	Poland	POL
Czech Republic	CZE	Portugal	PRT
Denmark	DNK	Slovak Republic	SVK
Finland	FIN	Spain	ESP
France	FRA	Sweden	SWE
Germany	DEU	Switzerland	CHE
Greece	GRC	Turkey	TUR
Hungary	HUN	United Kingdom	GBR
Iceland	ISL	United States	USA
Ireland	IRL		

Notes

1. The three previous monographs are: OECD (2000), *Special Needs Education: Statistics and Indicators*, OECD, Paris; OECD (2004), *Equity in Education: Students with Disabilities, Learning Difficulties and Disadvantages*, OECD, Paris; and OECD (2005), *Students with Disabilities, Learning Difficulties and Disadvantages: Statistics and Indicators*, OECD, Paris.
2. The term student is used. It is to be regarded as synonymous with pupil or (school) child. When discussing pre-primary aged children, the term child/children is used as student seems inappropriate at this age level.
3. These definitions are to be seen in the context of the resources definition. Allocation of national categories to a particular cross-national category is based on the reason for provision of additional resources.
4. In the original data collection instrument, Table 5 requested data on programmes in national categories according to the ISCED definitions. Countries were unable to provide this information and as a result the table was dropped. To avoid confusion likely to be caused by renumbering the tables it was decided to keep the original numbering of the tables and simply omit Table 5.
5. All countries are OECD members with the exception of Chile.

References

UNESCO (1997), *International Standard Classification of Education*, ISCED, UNESCO, Paris.