



# Educational Assessment and Inclusive Education

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Paradoxes, Perspectives and Potentialities

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“What makes a school system successful? The agendas of assessment and inclusion have been pitted as alternate paths to have more efficient or more just schools, but they might have more in common than it is thought. Through a well-researched comparative analysis of five national cases, and with a wide theoretical toolbox that includes critical policy analysis, institutional and organizational frameworks, and assemblage and affect theories, the book invites readers to understand them as policy constructions that intersect and diverge following multiple historical and local trajectories, and to remain cautious about any claim to quickly fix schools’ shortcomings.”

—Inés Dussel, *Department of Educational Research, CINVESTAV  
Mexico City, Mexico*

“Through journeys in time, space and ideas, *Educational Assessment and Inclusive Education - Paradoxes, Perspectives and Potentialities* offers a timely and thought-provoking account of one the most contested topics in contemporary education policy: large-scale assessments. Readers are invited to delve into fascinating discussions brilliantly interweaving rich data into multifaceted theoretical argumentations while paying careful attention to both local contexts and global trends. For academics, students, policy makers and wider audiences engaged in debates surrounding assessment in education, this book is a great resource for getting complex perspectives that can help undermine simplistic arguments and populist decision-making.”

—Yariv Feniger, *School of Education, Ben-Gurion  
University of the Negev, Israel*

“This immensely scholarly book delivers a multi-layered and critical analysis that digs deeply and broadly into the complexities of the interaction between assessment and inclusive education. Ydesen and colleagues’ ‘comparative musings’ provide fascinating insights into how the five country cases manage the tensions within the system and they offer profound reflections on ‘who’s in and who’s out’ as a consequence. This book is a must read for both professionals and researchers with an interest in education and who need to get to grips with ‘how students are made and remade’ at the interfaces of assessment and inclusive education.”

—Julie Allan, *Professor of Equity and Inclusion at  
University of Birmingham, UK*

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## FOREWORD. BETWEEN TESTING AND INCLUSION, BETWEEN SCHOOLING AND EDUCATION

This book is an original, significant, timely contribution to schooling and education studies. It is original in terms of the methodology used to produce ideas and supporting information. It is significant because of the topics addressed—the relation between assessment and inclusion, and their transnational circulation. In the aftermath of the unprecedented suspension of in-person schooling during the COVID-19 pandemic, this work is also extremely timely since it allows us to reconsider, as the authors argue, the futures of education or, at least, of education systems.

As regards its original methodology to produce ideas, the book harmoniously combines the circulation across different fields and disciplines into education studies. Those fields include both elements of the paradox around which the book is structured: the tension between assessment tools' hierarchies and categorisations and the deconstruction of those hierarchies and categorisations driving inclusion in education. The paradox deployment is rebuilt within the educational systems in Argentina, China, Denmark, England, and Israel.

Those elements are combined with and within at least three other areas: i) that of the actors, through meaning construction in assessment and inclusion practices by policymakers, school leaders, and teachers; ii) that of policies, through the analysis of the normative discourses around which such practices are structured; and iii) that of the transnational circulation, by looking at the guidelines derived from international organisations but, above all, through the contextual reconstruction assigned to assessment and inclusion policies in each educational system under study.

Circulation in those areas is, in turn, combined with a rich fabric of theoretical resources coming from the fields of sociology, philosophy, and critical policy analysis. These resources nurture the conceptual scaffolding underlying the paradox elements, that is, assessment and inclusion. Also, the historical perspective together with post-structuralist studies in the field of comparative education permeates and cuts across both theoretical and empirical constructions for case study. In short, it is a complex architecture that builds, as its theoretical object, a relation that has been under-researched in education, that between assessment and inclusion.

As stated above, the complexity of this architecture, which is built upon the circulation across different areas and disciplines, radiates out to its development in different geographical spaces. But it does so in an original way as it seeks to put objects, perspectives, and, above all, other geographies into circulation. Several years ago, Ydesen, principal investigator in this book project, already addressed the issue:

A comprehensive international history of testing and accountability needs to include several regions not included in these papers: Latin America, Africa, and South Asia. A number of questions should arise from broader comparative examination, including but not restricted to the following [...]. (Dorn & Ydesen, 2014, pp. 4–5)

More recently, Alarcón and Lawn (2018) have argued that “contexts outside Western Europe (except for the United States) are generally neglected, and the cultural conditioning of assessment has not been sufficiently considered” (p. 12).

In this book, the concern to put geographies into circulation is expressed in several layers. The most apparent one is the incorporation of countries which are usually outside the hegemonic scope of Mid-Atlantic comparative education studies. But what contributes the most to an original knowledge production methodology is the effort made by the authors to read practices and discourses on assessment and inclusion through the lens of translation and comparison or, as Dussel (2015) proposes, reading while translating, reading while comparing.

Indeed, the elements of the paradox under study are characterised by their diverse definitions and meanings—a diversity that comes from linguistic and historical differences among the educational systems, which the authors are careful to consider. It may well be argued that the strategy to make other geographies visible on the horizon of concerns is also an

epistemological strategy: the construction of meaning of assessment and inclusion, and their mutual connection, is also attained through the scholars' dissemination, circulation, translation, reception, and appropriation of words.

Making other geographies, and along with them other meanings, visible is a typical challenge faced by socio-historical comparativists in comparative education and historians of education as well. In this sense, Caruso (2014) offered a relevant opening through the idea of within, between, above, and beyond when referring to the history of the internationalisation of knowledge and educational practices. This insightful use of prepositions relates to mobility in the change of scales, which implies transnational contexts or more limited ones. The study of this mobility allows for identification of the transformation of concepts, meanings, or models in their passage from one place to another to analyse the extension of changes, appropriations, and hybridisations that occurs across time and space (Kaelble, 2006 as cited in Oelsner, 2021). Hence, thinking about different geographies in terms of circulation, or circulations, implies an opening to other questions on: what circulates, how it circulates, why it circulates, and, above all, what effects this circulation has.

Indeed, the challenge in terms of circulation—or circulation of knowledge and educational practices—is that of scales, the circulation through space and time. At this point, a recent conceptualisation by educational historian and comparativist Antonio Nóvoa (2017) may be useful. And this could be linked to the strategic way the authors use the three axes strategy by Bartlett and Vavrus (2018). Nóvoa proposes two passages in relation to these central categories of time and space: from space to spatialities and from time to temporalities. It would not be a question, as in recent decades, of analysing transfers within the framework of the global–local relationship but of relocations in spaces of fluidity and fluctuation, and of turbulence, and in different temporalities (not the photograph but rather becoming), that is, how does education occur over time and space? And with what knowledge and which educational practices? Who act as senders and receivers? Under what forms do knowledge and educational practices circulate?

Temporalities and spatialities refer to the spaces of intersections, assemblages, or entanglements (Sobe, 2013), a perspective explicitly adopted by this book to undertake its empirical, contextual, and explorative ambition. Underlying this is the discussion about the use of comparison, or more

specifically, about the forms of knowledge production in comparative education. The authors seek to avoid generalisations or pattern descriptions through an exploratory research design teasing out examples of where policymakers and practitioners have attempted to engage with, navigate, and/or balance concerns about assessment and inclusive education in selected contexts within their national jurisdictions.

The book's perspective reminds us of educator Cecilia Braslavsky (1999) and her participation in a paradigmatic study in Latin America. In her book on the new paradigms for late twentieth-century Latin American education—on which I had the honour to collaborate—Braslavsky writes:

From the very beginning we wondered whether those limited notions were legitimate, and if after them it was possible to keep writing about 'the region', 'Latin America', or 'most of those countries'. Whenever we hesitated, we came across a new English, American or French book suggesting action criteria without mentioning neither place nor time, nor the production context peculiarities. Faced with these multiple, everyday presences, we ratify what might have been a bold act: attempting to reconstruct an image as if swimming in a specific part of the ocean, diving from time to time to see underwater, and then sharing with other swimmers our feelings and representations of the very same ocean. (p. 280)

Indeed, the book navigates across different specialities and, to a lesser extent, across diverse temporalities. At this point, it might be suitable to consider some of the contributions made by the history of transnational education in terms of temporal framing. Here, the work of Roldán Vera and Fuchs (2019) is helpful. These authors differentiate between global history and transnational history. Although transnational history also refers to a history that crosses borders and considers state and non-state actors (unlike international history, which is based on the state or other institutionalised actors), it is spatially more restricted—it does not deconstruct the nation; instead, it presupposes its existence and studies its development as a global phenomenon. However, it contextualises the nation in a set of relations of translation, entanglements, and dependencies. So, the term transnational tends to apply primarily to the modern world order of nation-states rather than to modern or pre-modern societies.

This definition is helpful because the book indeed refers to the expansion of schooling, which emerged in Western European nation-states. But the contributions of “entangled” history (a term better established in



English if we think of the previous *histoire croisée*, or “shared history”) could also be considered. It describes a way of making History that examines multidirectional supranational flows and also reflects on and makes explicit the (intertwined) conditions under which historians construct their transnational research objects. Accordingly, Mayer (2019) offers a relevant perspective to avoid downplaying complexity when addressing changes of scale (spatialities) and diverse times (temporalities). She defines transnational history as one that provides a reference framework for relational approaches focusing on interaction, connection, circulation, and interweaving across borders (p. 53). She proposes that we think of circulation as a constellation that is itself the product of an interweaving, that is, constellations as a product. From our perspective, the resulting combination of discourses and practices on assessment and inclusion in each educational system studied in this book could be considered one of these constellations.

As we said at the beginning of this foreword, along with the book’s originality, another aspect that stands out is the relevance of its topics, centred mainly on the argument of the paradox between assessment and inclusion. In tune with the authors, we could say that a more structural tension that is characteristic of modern education systems underlies this paradox: the tension between education and schooling. From this perspective, even though the empirical object of the book is assessment and inclusion, the theoretical object is the relation between these elements, or maybe also the specific relation between education and schooling.

It is a book about education because it deals with the sharing of knowledge and its effects in the constitution of subjects. It refers to that which education philosophy identifies as the purposes of education, which the authors combine with a post-structuralist perspective on the productive nature of the purposes in terms of power relations. But it is also, and above all, a book about schooling because it focuses on the phenomenon of education systems and their roles in preparing children and teenagers for their circulation in school and other social systems. In this sense, and irrespective of the efforts that we know for a fact were made to thoroughly address the ways of producing knowledge in comparative education, the book clearly considers two focal points of this subject matter.

On the one hand, and as we said before when we introduced the notion of circulation, something that underlies the authors’ search for the construction of meaning of assessment and inclusion practices is the notion of

transfer, a specific concept of comparative education (see, among others, Ferraz-Lorenzo and Machado-Trujillo, 2020), but also of the *histoire croisée* as highlighted by Mayer (2019), in the case of the notion of cultural transfer. Oelsner (2021) also refers to this concept and puts it in direct relationship with that of circulation. According to this author, the concept of transfer was originally proposed by the Frenchman Michel Espagne, a specialist in relations between France and Germany, to replace the historical comparison between nations with the historical study of, for example, the circulation of ideas and values, of the exchange of products, of the migration of people from one society to another. As regards comparative education, it is fitting to recall the words of Cowen (2009) who states that the crucial intellectual problematique of comparative education is transfer—which always creates a remarkable puzzle: “as it moves, it morphs”.

On the other hand, the book’s focus on schooling, its roles and its systemic architecture situates it in what, again, Cowen (2021) defines masterfully as the unit ideas of comparative education:

Of course ‘comparative education compares’ but it does so in rather a complex way. The vital prior question is about the political, economic, and cultural meanings of educational patterns and the way or ways in which they will be understood [...] Comparative education uses a small number of crucial ideas—and individual comparative educationists can be distinguished by which combinations of these crucial themes they choose to emphasise. These themes are the “unit ideas” of comparative education (Cowen, 2009a; 2021). They include: the educational system; space; concepts of educated identity; the state; praxis; time; social context; and “transfer” (the international movement of educational ideas, principles, institutions, and practice) (pp. 14–15).

The unit ideas of comparative education could be considered an empirical anchor point to analyse the circulation of discourses and practices across spatialities and temporalities. Those points would be the ones that give shape to the constellations that we referred to above. The book provides such exercise through the proposal for constructing orientation points associated with the paradox between assessment and inclusion. According to the authors, these orientation points refer to the forms of meaning-making and classification that assessment and inclusion adopt in each educational system. Triple A condenses the terms for assessment: Attainment, Assessment, and Accountability; Triple D is the umbrella for inclusion: Deviance, Deficiency, and Disconnectedness. These terms serve as intermediate categories to describe the form taken by the attributes

underlying each case. In addition to the originality of the methodological approach, we are interested in highlighting the connection of these terms with Cowen's unit ideas. Indeed, these terms clearly illuminate the trajectories of at least two of them: the structuring of educational systems and the shaping of educated identity.

Finally, the statement that the book deals with the tension between education and schooling may go against the novelty that it offers. However, it could not be more relevant and timely. It is relevant because it speaks to us about where we are at, it provides us with a diagnosis of the effects of assessment and inclusion policies and, at the same time, it shows us the tensions that have historically permeated educational systems. Indeed, the paradox, that the book explores, constitutes a focal point in the organisation of educational systems, which have configured themselves in a tension between expansion and diversification: more access, yet differentiated.

The expansion of schooling has been a growing, uninterrupted phenomenon since the late eighteenth century in the Western world, and it has reached a global dimension already since the early twentieth century. This steady, growing expansion has been accompanied by schooling diversification processes through institutional differentiation processes (Acosta, 2021; Ojalehto et al., 2017). As the authors properly remark, education has occupied a key place in the agenda of nation-states since the nineteenth century, and in the twentieth century, international discourses on education came together to formulate the notion of the right to education and the expansion of schooling as a means of access to that right.

The figure of an educating State is tied to the process by which educational systems, in the form of technology for the expansion of schooling, took shape. Indeed, it could be said that expansion globally has become the basic concept underlying schooling, a myth as well as a guide to legitimise institutions and states as they operated in education. On a political-judicial level, the origin of an educating State and the expansion of schooling at a national scale lies in the French Revolution, although previous experiences took place in reformed areas of Germany and in Switzerland. It was not until the French Revolution in 1789, and the subsequent configuration of the classical liberal state in the late eighteenth century, that individuals were seen as having private and public rights under the rule of law in a state of and by citizens.

Notwithstanding, the welfare state is what ushered in the notion on a large scale that all men and women have a right to universal education free of charge with mandatory levels defined by each State in a system

organised around articulated levels. Education, then, became a fundamental human right, a benefit that required active state intervention to ensure that all the individuals in a given country had effective access to it. But it is through schooling that states guarantee the right to education, which means that the right to education is, in fact, the right to schooling.

From the perspective of the expansion of schooling, understanding the process whereby education and schooling became equivalent requires analysing three passages: the passage from the discourse of education to the discourse of schooling in the late eighteenth century; the passage from a school based on rudimentary institutional arrangements to the modern school in the nineteenth century; and the passage from a school system to an educational system in the mid-twentieth century (Acosta, 2019). Those passages show an increasing process of educationalisation (Tröhler, 2013; Tröhler et al., 2011), that is, the deployment of mass schooling as a means to address social problems, such as the consolidation of nation-states and capitalism. The formation of citizens, as a new way of self-regulation and of social governance, became the cornerstone of the schooling agenda or, in Popkewitz's (2009) words, the new moral issue. From the perspective of transnational circulation, this wider process is bound to other processes such as i) state educational systems as essential to the ability of republics to survive, ii) growth of republics throughout the world over the nineteenth and twentieth centuries, and iii) mass expansion of schooling around the world in those centuries. In Popkewitz's view, this would indicate that the combination of republicanism and education was a worldwide success. Some of the education systems under analysis in this book, particularly that of China, may challenge this conclusion.

It was necessary, in a new scene on a larger scale, to constitute a universal, simultaneous, and homogenous school that formed the basis for educational systems by means of processes of systematisation and segmentation (see the classical study by Müller et al., 1990). The effects of this change on the expansion of schooling are clear: an authentic cultural revolution that gradually brought the population into a new system for the configuration of subjectivity and social regulation. The limits and contradictions of educational systems are implicit in the fact that school experience ensues in the tension between simultaneity and homogenisation, and a school trajectory in the tension between propaedeutics (systematisation) and inter-institutional diversification according to social background (segmentation).

Nevertheless, assessment, insofar as it is a mechanism for classifying subjects, has also been useful as a way to guide the public: who are the ones that pass to the next level, have access to some kind of school, or move into higher education. Of course, as the authors point out, this role of assessment has intensified and taken on a particular form, as a classifier of institutions and even educational systems, since the boom of standardised testing in the late twentieth century. As we all know, the history of education indicates the existence of the practice of verifying learnings even before the development of school as the centre of the process of social problems' educationalisation—a development dated by the late eighteenth century. From then onwards, assessment has gained increasing prominence in the structure of schooled pedagogical practice.

An important change that took place was the development of standardised tests with transnational circulation. Their origins can be traced back to the 1930s when certain North American philanthropic foundations such as the Carnegie Foundation made progress in developing standardised testing in several countries. Based on this experience, without a doubt, the space race ushered in a new era—one in which educational expenditure was said to be justified in the name of competency in the outcomes. With this aim, it was necessary to look for mechanisms to measure the education systems' investment outcomes. Later on, these same mechanisms would be used to justify families' autonomous selection systems for their children's schooling.

Going beyond this brief summary, the point is, how do we make the shift from assessment as an inherent mechanism of schooling and its ways of verifying achievements and rites to international systems for education quality accreditation, which is the current purpose of standardised international tests such as PISA. The question seems to be whether we were faced—at least up to the start of the pandemic—with a shift towards an educationalised world in the form of internationally assessed educational systems. This shift reflects a twist. On the one hand, it points to a new stage in the expansion of education systems, no longer focused on expanding the offer. On the other hand, it shows that organisational principles do not always revolve around the specifically educational aspect. As Cowen alerts (2018), the OECD and PISA offer new ways of re-shaping and governing educational systems, in which education is reduced to skill acquisition: the question of what is made available to the new generations might lose prominence; in terms of the concept of languages of education, the question is what educational reality is constructed when education is ousted.

And here the book's reflection is crucial: guaranteeing access to knowledge speaks about what we make available and what reality is constructed from there. And it also speaks about the performativity of assessment schemes. Finally, the text invites us to think about the extension of compulsory schooling and what is known as inclusion in education. As we know well, assessment not only addresses the demand for students' grading and promotion to the next grade, but it is also a mechanism to regulate the flow of students within an education system. Ultimately, we agree on the central thesis of the paradox presented: assessment is also a selection process.

But as we said, the book is timely in its production and publication context: the post-pandemic world. Indeed, the interruption caused by the COVID-19 pandemic was probably the first and only massive interruption of this way of imparting knowledge. It took almost three centuries to get all children and youth to attend school in person and on a regular basis. Between March and April 2020, 194 out of 195 states recognised by the United Nations closed their schools. The closure affected more than one billion students, including those in the post-secondary level. This technology to share knowledge at a massive scale, which had been criticised from the very moment of its transnationalisation at the turning of the nineteenth century to the twentieth century, was suspended. The plunge into "schooling without school" aided by other technologies (photocopies, television, the radio, videos, audios, digital platforms with synchronous and asynchronous classes, social networks, among others) established us in a scenario unlike the one we had experienced in the previous 150 years—one that could change schooling as we know it, or not.

One of the alterations produced during the pandemic is related to the expansion of the transmission context (Acosta & Graizer, in press). Certainly, the pandemic has altered the forms of schooling by presenting a new scenario: the possibility to extend school teaching beyond the time and building barriers (Serra, 2022), and this has entailed other forms of regulating transmission. In this sense, the traditional categories we use to study schooling may prove to be limited in describing this new scenario. However, the return to in-person schooling seems to have put on hold the revision and creation of new categories.

And this is the reason why I call this work timely: the book's focus on two of the main drivers of education systems and schooling—assessment and inclusion—refers to their historical forms, to their current development but also to their limits in the face of old and new challenges. Of

course, the history of educational reforms offers experiences in this regard. Perhaps it is not so much about thinking about the future of the education systems but rather about specifying which technologies of schooling we are interested in preserving and which technologies should be modified in order to become allies of what Tröhler has called “the magic of the school house”. This book offers promising hints in this direction as well.

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At the ideational and organisational levels, the project to a large extent emerged from the network of international researchers who had been involved in the process behind the anthology *Testing and Inclusive Schooling—international challenges and opportunities* published in 2018. In this way, the present book stands on the shoulders of that edited volume but goes significantly beyond in terms of scope, range of comparison, and the inclusion of historical dimensions. In a wider sense, the new project reflected Christian Ydesen’s previous research agendas covering the history of high-stakes testing, the history of the OECD and UNESCO in education, the state-crafting practices of welfare state professionals, and intercultural education.

The concrete rationale for the research project emerged from an observation that the two powerful agendas of “testing” and “inclusion” in education are often researched, both empirically and theoretically, in isolation, regardless of their close intertwinement and constitutive effects in policy and practice. Thus, our principal research aim was to contribute towards a more nuanced understanding of these agendas and their interactions through comparison of findings from several purposively selected case countries. Part of this endeavour has also been to bring established and

early career researchers of inclusion and assessment from diverse higher education institutions across the globe into closer contact to promote knowledge exchange and advancement through fruitful discussions and debates across the two research fields. This has happened throughout the project lifetime but was perhaps most evident at a preliminary methodology workshop attended by all members of the research team in Aalborg in February 2020, in the early days of the COVID-19 pandemic and only weeks before many countries in the West went into national lockdown.

The research team was led by principal investigator Professor Christian Ydesen who was supported by four postdoctoral researchers—Alison L. Milner, Tali Aderet-German, Ezequiel Gomez Caride and Youjin Ruan—and six research assistants—Nanna Ramsing-Enemark, Ida Spangsberg Hansen, Line Frejlev, Clara Gobbee, Islam Abuasaad, and Simon Holleufer—over the lifespan of the project. The project has also benefited from the knowledge and experience of five senior partners, all of whom are esteemed senior researchers of assessment and inclusion from the case countries: Professor Liu Baocun, Director of the Institute of International and Comparative Education, Beijing Normal University, China; Professor Jo-Anne Baird, Director of the Oxford University Centre for Educational Assessment (OUCEA), Department of Education, University of Oxford, United Kingdom; Dr Avi Allalouf, Director of Scoring & Equating and Deputy Director of the National Institute for Testing and Evaluation (NITE), Israel; Professor Felicitas Acosta, Universidad Nacional de General Sarmiento in Argentina; and Professor Thomas S. Popkewitz, Department of Curriculum and Instruction, University of Wisconsin-Madison, USA, who also served as a consultant during parts of the data analysis. Finally, several associate members have also served as co-authors and critical friends on the project.<sup>1</sup>

We would like to give a special thanks to all the research interviewees who devoted time from their busy schedules to speak with the research team. The first interviews were conducted in the autumn of 2019 when Christian Ydesen served as an Honorary Research Fellow in the Department of Education at the University of Oxford. It was during this semester that the project was launched. The experiences and reflections from the Oxford semester were key to organising the project plan when the full-scale project—with all case contexts—was initiated at the February 2020 workshop.

<sup>1</sup><https://www.en.culture.aau.dk/research/projects/Education+access+under+the+the+r cign+of+testing+and+inclusion/Members+and+Affiliates/>

One of the changes made to the project during its lifespan has been the conceptual shift from the original title of the project where the term “testing” rather than “assessment” appears. As explained in Chap. 1, the focus on testing seemed too narrow to capture the full breadth of policies and practices we sought to investigate in the case contexts. We therefore changed the title to incorporate the broader term “assessment”.

During the project period, the team or team representatives have presented at numerous international conferences and written a host of academic papers including a background report for the UNESCO Futures of Education initiative. Please visit the project website for an updated overview: [EduAccess.aau.dk](http://EduAccess.aau.dk)

As a transnational—and mostly virtual—writing collaboration, it is only fair that we thank each other for remaining constructive, tenacious, and level-headed throughout the project, even when the going got tough.

Finally, we want to give a special thanks to our families for their enduring support and understanding.

August 2022  
Aalborg, Buenos Aires, Tel Aviv

Christian Ydesen  
Alison L. Milner  
Tali Aderet-German  
Ezequiel Comez-Caride  
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