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Special education and meritocratic inclusion¹

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In this theoretical article we present our hypothesis on the incompatibility of the inclusive education policy toward students with special educational needs with the meritocratic principle of education. If considering and recognizing the needs of these students is necessary to achieve a successful inclusive environment, we propose that this goal cannot be achieved within current educational systems driven by a meritocratic ideology. We base our rationale on social psychology theories such as system justification and backlash to argue that such incompatibility is particularly visible during the evaluation process. Finally, if we provide some incentives toward greater inclusion while considering the diverse contradictions such inclusivity generates, we also invite researchers to further empirically examine these contradictions in order to guide policy makers within their choices.

Keywords: Inclusive education, meritocracy, special educational needs, backlash, equity.

Since the Salamanca Statement and Framework for Action on Special Needs Education (UNESCO, 1994), the inclusion of students with special educational needs within mainstream education has been promoted by governments all over the world (Pit-ten Cate et al., 2018). Political measures supporting this movement aim to improve social participation and respond to the increasing diversity of learners, notably those with special educational needs, yet barriers still remain (Bastart et al., 2021; de Boer et al., 2011; Florian & Spratt, 2013; García-Barrera, 2022). Recent research in social psychology has notably identified several obstacles that restrain inclusive practices toward these students, such as, for example, teachers' attitudes (Desombre et al., 2019, 2021; Khamzina et al., 2021). In this article, we propose to focus on a possible ideological barrier at a systemic level: the prevalence of meritocratic norms in schools, particularly when students are evaluated (Darnon et al., 2019; Wiederkehr et al., 2015).

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The inclusive school as a project of social justice

Inclusive education refers to the opening up of school access to all learners, regardless of their gender, ethnicity, cultural background, social status or disability (Magnússon et al., 2019). According to Angelides (2008), inclusive education “is related to learning and participation, to the acceptance of difference, to the school as a whole, to democracy and to society in general. Inclusive education means that all children have the right to learn in the school of their neighborhood” (p. 319). In a similar vein, the Centre for Studies on Inclusive Education, as cited by Runswick-Cole (2011), specifies that inclusion is a process involving a restructuring of the cultures, policies and practices in schools to better respond to the diversity of students to increase their learning and social participation. Finally, Booth (1996) indicates that inclusion needs to address both the reduction of material and ideological barriers, such as exclusionary structures, discriminatory behaviors and attitudes, in order to increase the inclusion and participation of the students within the cultures and curricula of mainstream schools. In practice, inclusive education can thus take many forms, from providing access and “mainstreaming” students with special educational needs in general classrooms, to the creation of cooperative and learning communities for all, regardless of students’ particularities (Göransson & Nilholm, 2014). In the present paper, we will specifically focus on the former, the inclusion of students with special educational needs.

Despite differences in the definition and conceptualization of inclusive education for these students (see for examples Göransson & Nilholm, 2014; Nilholm and Göransson, 2017 for a critical review), this trend for inclusion reflects the idea of a democratic system offering everyone the same opportunities for learning and, as such, is concerned with the “promotion of all” in the name of social justice through the school (Paseka & Schwab, 2020). Several justifications are given for the need to welcome students with special educational needs and guarantee their education and full social participation within their classrooms. Ainscow and collaborators (2019) notably argue that the justifications offered can be educational (i.e., the legal obligation for inclusive schools to educate all children), social (i.e., move toward a more just and non-discriminatory society by educating all children together) and economic (i.e., a lesser cost of maintaining schools that educate all children together rather than different schools specializing in different groups of children). Ultimately, the process of inclusive education is viewed as a mean to create a more just society which benefits all children (Göransson & Nilholm, 2014).

Recent empirical work demonstrates that inclusive education of students with special educational needs is possible and efficient. For example, Szumski and collaborators (2017) reviewed 47 studies that explored the effects of school inclusion on the academic achievement of students without special educational needs. Across a different set of studies and contexts, with a large panel of participants ($N = 4,800,000$), the observed effects of school inclusion on

achievement were small but positive ($d = 0.12$, 95% CI [0.02; 0.23]). Kefallinou and collaborators (2020) provide the same conclusion by reviewing the literature of inclusive education on several outcomes, such as academic achievement and employment. The authors demonstrate that inclusion can benefit students with and without learning disabilities on their school achievement, and that such effects maintain over time. Implementing inclusive settings can also have positive effects on social participation, with greater qualifications, employment and financial status for the students, though it is not always easy nor successful (Ainscow et al., 2019).

Besides difficulties with teacher training, funding, attitudes or physical barriers to the social participation of students with special educational needs, ideological and organizational obstacles could also be faced (De Beco, 2018; Ferguson, 2008). Hence, we will discuss inclusiveness at a system level, taking into account the potential ideological obstacles to its implementation (Nilholm & Göransson, 2017). In the next section, we will particularly argue that recognizing and considering the situations at the origin of the difficulties for students with special educational needs on the one hand while, on the other, providing fair and equitable compensation could clash with the prevalent scholastic norms of recognition of individual merit and the promotion of an elite school (Dubet & Duru-Bellat, 2020; Pavie et al., 2021). In the following, we further develop our argument that the project of an inclusive school conflicts with the meritocratic myth of selection based on individual effort.

Defining school meritocracy

School meritocracy is a system of belief advocating that “academic success is and should be determined primarily by individual effort and talent” (Darnon et al., 2018; Mijs, 2016; Wiederkehr et al., 2015). According to Dubet (2006), school meritocracy constitutes both a social ideal and a way of rewarding individuals, as most people consider merit as a fair basis for rewarding efforts and talent when comparing individuals. Research in the sociology of education and social psychology has demonstrated that this ideology is a cornerstone of many educational systems and is particularly prevalent in occidental countries (Butera et al., 2021). Thus, school meritocracy can be operationalized as an ideology that justifies inequalities, and as a principle of justice that promotes a social model based a supposed “equality of opportunity” (Pavie et al., 2021; Pratto et al., 1994).

In the literature, the idea that results in society should be distributed based on merit is expressed by prescriptive meritocracy (Deutsch, 1975), while descriptive meritocracy, on the other hand, relates to the idea that meritocracy already exists in society (Darnon et al. 2018, Zhu et al., 2022). In educational contexts, the former refers to the idea that schools must offer everyone the same opportunities to demonstrate their skills and merit in the course of a continuous latent competition (Butera et al., 2021). It is therefore expected that the school should set up a fair competition, free from the effects of social inequalities, in order to bring out

pure merit on which “fair inequalities” can be built (Dubet & Duru-Bellat, 2020). In such a meritocratic system, because all students supposedly have the same initial conditions when in school, the acknowledgment of their success becomes primarily determined by relative ability and effort (Batruch et al., 2019). Thus, evaluating and selecting the best students supposedly becomes fair because meritocracy recognizes effort, talent and competence rather than social status and systemic differences in individuals (Mijs, 2016).

However, a large body of literature documented how this assumption does not hold against the fact that the school system actively reproduces existing social disparities and justifies these ones by using a meritocratic discourse (Darnon et al., 2018; Dornbusch et al., 1996; Wiederkehr et al., 2015). For example, socioeconomic status is strongly associated with school performance, a result consistently reported by meta-analyses (Sirin, 2005; Kim et al., 2019) and international reports (OECD, 2019). Social psychology has shown that making competitive and meritocratic norms salient can impair the academic achievement of students from low socioeconomic backgrounds², producing an effect comparable to the stereotype threat (Goudeau & Croizet, 2017; Jury et al., 2015; Smeding et al., 2013). In school environments, one of the consequences of this meritocratic paradigm is that the success or failure of individuals becomes primarily explained by individual and internal factors (e.g., effort, talent, posture), rather than more external influences (e.g., social origin, gender, ethnicity). Ultimately, the meritocratic ideology is presented as a means of overcoming its own social determinants, whereas it contributes to accentuating social inequalities (Mijs, 2016; Darnon et al., 2018). Although the concept of meritocracy goes back hundreds of years, the psychosocial studies of school meritocracy are quite recent (see Trevisan et al., 2021 for a review). As developed above, meritocracy has long been associated with fairness as a concept that justifies the unequal distribution of benefits and rewards (Deutsch, 1975) or as a belief that underpins a system (Zhu et al., 2022). Authors investigating school meritocracy point to its conflicting impact on students: they are considered fundamentally equal while being engaged in a series of tests whose purpose is to make them unequal (Mijs, 2016). This illustrates a fundamental function of schooling, besides educating children and students: selecting the “best” ones (Autin et al., 2015; Batruch et al., 2019). Simply put, the school contributes to determining which students deserve access to prestigious studies and, in so doing, to positions of high status and power in society (Dubet & Duru-Bellat, 2020). Because schools are part of a system in which meritocratic ideology is prevalent, individuals internalize the belief that merit structures the distribution of resources such as status, wealth and power (Brown & Tannock, 2009; Dubet & Duru-Bellat, 2020). According to system justification theory (see Jost, 2019 for a review), individuals can be motivated to defend and justify aspects of embedded social and political systems, even when this justification is disadvantageous to their self or social group. Hence, meritocracy could be

² See Rohmer et al., 2022 for similar results on dyslexic children.

seen as a fair distributive system simply because individuals are socialized within societies and educational systems that emphasizes efforts and competence as self-evident indicators of success (Darnon et al., 2018; Mijs, 2016).

Since this ideology serves as a means of justifying, and even essentializing, inequalities of success at school, some authors have been interested in its relationship with another model of social justice: that of equity (Deutsch, 1979; Trevisan et al., 2021). According to Deutsch (1975) what is the heart of the justice concept is the allocation of conditions and resources that have an impact on each individual member of a group or community. The fundamental principles of justice are those that encourage efficient social collaboration to advance personal well-being. However, the “equality of opportunities”, as foundation of a “fair” competition within a meritocratic school system does not acknowledge, nor does it respond to students' special educational needs. The idea being to set up equal conditions for a selection exclusively based on individual effort and capacities. Quite contrary to this, equity is when resources are shared based on what each person needs, thus students' special needs are met in order to adequately level the playing field. In other words, in order to reach equality as an outcome, schools have to tackle the causes of inequality by responding to students' special needs, thus imposing a principle of equity.

More recently, Pavié and collaborators (2021) offer a distinct definition of a universalist model of justice that aims to promote equality for all, by recognizing and compensating for each student's specificities or by canceling and/or removing the school selection criterion altogether. Here, the concept of equality refers to that of outcomes, namely that everyone is expected to succeed to the same degree. In contrast, “equality of opportunities”, as in the meritocratic model, emphasizes on giving the same chances to all individuals in order for the competition to be fair. In other words, the universalist model aims at the inclusion and perseverance of all students whereas the “meritocratic” needs to classify, compare and select some students to the disadvantage of others. Here, we argue that recognizing the needs of students with special educational needs and making accommodations for them could threaten the belief in an “equality of opportunities” promoted by school meritocracy. In other words, the incompatibility between inclusive schools and meritocracy would be particularly salient when evaluating students, particularly those with special educational needs.

The incompatibility between school meritocracy and inclusion

Benjamin (2002) has already highlighted the contradictions between the principles of meritocratic selection and inclusion in the logic of the universalist model. For this author, it seems difficult to articulate the full participation of students with special educational needs in the different aspects of their school life, while schools and their students are dominated by the need to compete with each other (Benjamin, 2002; see also Lloyd, 2008). Students with special educational needs may suffer from the underlying contradiction that schools aim for the success

of all, yet still point out the differences of each individual through the evaluation and selection of “deserving” students (Zaffran, 2015). Thus, it seems that this inclusive education policy clashes with an educational system that promotes the ideal of equal opportunities, while excluding those who do not “fit” into the academic norms (Benjamin, 2002; De Beco, 2018; Stephens et al., 2012). Research highlights that the exclusion of these “unfitting” students particularly takes place in evaluative contexts (i.e., tracking, final exams, summative evaluation) which emphasize competitive and meritocratic norms (Batruch et al., 2019; Butera et al., 2011; Croizet et al., 2017). For example, Smeding and colleagues (2013) showed that students from lower socioeconomic backgrounds (i.e., first-generation students) performed worse when an assessment was presented as summative than when it was offered as formative (i.e., a selective rather than educational evaluation). According to the authors, this selection function, which undermines the academic success of first-generation students in university, is entrenched in the structure of the school institution (see Jury et al., 2017 for a review).

Such contradictions have been further studied in recent empirical work. In their research, Khamzina and colleagues (2021) show that the more teachers believed that the education system had a selection function, the less supportive they were of inclusive education. Teachers’ beliefs in school meritocracy mediated this relation: specifically, teachers who adhered to the selection function reported more negative attitudes toward inclusive education partly because it ran counter to their beliefs about meritocracy. These findings consist of an empirical argument illustrating the incompatibility between the meritocracy principle underlying western education systems and inclusive education policy. One explanation for this relation could come from the fact that the more individuals believe in meritocracy, the less likely they are to support the implementation of pedagogical methods oriented toward equity (Darnon et al., 2018, 2021). Inversely, people may lose faith in meritocracy, if they feel that its distribution system is unfair (Zhu et al., 2022).

These data fuel the idea that there is an incompatibility between the concept of school meritocracy and inclusive education, particularly in the process of selecting students on a “fair basis”. From a practical standpoint, such an incompatibility can, for example, be particularly salient in an exam in which a student with special educational needs received an accommodation (e.g., extended time or oral accommodations, see Jury et al., 2022). Even if the literature concludes that it could improve the achievement of students with special educational needs without advantaging them in comparison with their peers without such needs (Sireci et al., 2005), it could still be perceived as unfair since not every student benefitted from these accommodations (i.e., “equality of opportunities”). In the next section, we will argue that if students with special educational needs succeed as well as their ordinary counterparts through this accommodated exam, they could come up against an additional ideological barrier to the acknowledgement of their success, a process known as “backlash”.

“Backlash” as a tool for system recovery

Since the meritocratic principle of selection classifies and sorts students based on their achievements and efforts, providing accommodations for some students, as evoked above, could be seen as an impediment to “fair” selection (by “helping” them), thus threatening the system (Brueggemann et al., 2001; Pavie et al., 2021). Put another way, a successful student who has his or her special needs recognized and met could be seen as a threat to the principle of equality of opportunities promoted by school meritocracy.

Consequently, backlash could be used as a tool to restore control and justification in the meritocratic model (Rudman et al., 2012). According to Rudman and Fairchild (2004), the backlash phenomenon consists of punishing counter-stereotypical behaviors in order to restore the target's sense of status quo. In their model, the “status incongruity theory” predicts that individuals who violate the expectations of the stereotypes attached to their groups can suffer sanctions from the perceivers, to discourage “deviance” that threatens this status quo. This sanction would, consistent with the system justification theory, serve as a way to reduce a perceived threat toward the system, and maintain the social order (Jost, 2019). In the literature, this phenomenon has been studied primarily with women who engage in dominant or assertive behaviors which are perceived as high status and more “masculine”, according to gender norms (Rudman & Fairchild, 2004). Accordingly, individuals who display counter-stereotypical behaviors that challenge the beliefs associated with social hierarchies are prone to being sanctioned. For instance, Rudman and colleagues (2012) demonstrated that agentic women (i.e., who manifest their power and will) were evaluated as less hireable and less likable when compared to agentic men. In other words, these women may have been perceived as threatening the gender status quo because they disrupt what is expected of them by expressing counter-stereotypical high-status traits. Williams and Tiedens (2016) showed in their meta-analysis that the backlash effect on women had an overall small effect on their likeability ($d = -0.19$, 95% CI $[-0.34; -0.04]$, $k_{\text{studies}} = 63$), but a stronger effect on hireability ($d = -0.58$, 95% CI $[-0.81; -0.35]$, $k_{\text{studies}} = 20$). In their article, the authors stress the importance of beliefs about the stereotyped categories suffering from backlash, as well as its salience in the social context: “counter-stereotypic or counter-normative behavior, which is generally presumed to be socially costly, may yield social penalties only when the behavior is explicit enough that perceivers are able to recognize and encode it as counter-stereotypic” (p. 179).

Recent work also suggests that the backlash effect can target individuals in educational settings, such as students with a low socioeconomic status (stereotyped as less competent than others; Croizet & Claire, 1998). Batruch and colleagues (2017) focused on backlash to understand how the academic success of students from disadvantaged backgrounds could represent a threat to the meritocratic belief. In their work, the authors highlighted evidence of backlash by presenting a scenario in which students from disadvantaged backgrounds could

access prestigious streams of education usually reserved for students from more privileged backgrounds. In this scenario, participants (i.e., psychology students in the first experiment, and French preservice teachers in the second) gave harsher grades to the students coming from a less privileged socioeconomic background compared to those from advantaged backgrounds, while students' achievement was held constant, thus illustrating the backlash's function of a system preservation tool (Jost, 2019; Rudman et al., 2012). Perceived counter-stereotypical behavior (here, students with low socioeconomic status striving for positions of power and success) was sanctioned in the sense that their performance was devalued compared to the performance of their more privileged counterparts.

Earlier in our article, we defended that evaluating students in their class makes comparison and competition particularly visible, as well as their different social identities (e.g., gender, social class, race, disability). From then on, it is possible to argue that the population of students with special educational needs, who also suffer from a negative stereotypical representation of their competence (Krischler & Pit-ten Cate, 2020; Louvet & Rohmer, 2016; Rohmer et al., 2022) could be backlashed, particularly if they succeed through educational accommodations. Indeed, their success could be perceived as unexpected, because these students are stereotypically expected to fail more compared to their mainstream peers (Cohen et al., 2019). According to backlash theory (Rudman et al., 2012), these students could thus be devalued and punished in their academic success to restore a sense of justification of the system. Backlash would therefore serve as a tool to restore the meritocratic status quo and prevent the full implementation of inclusive education: the success of students with special educational needs would not be perceived as being due to their determination and talent, both of which this population is perceived to lack (Louvet & Rohmer, 2016), but simply as being due to the additional "help".

Moving toward greater inclusion

In this article, we presented a rationale suggesting that there is an ideological incompatibility between the concept of school meritocracy, underpinned by the selection function of school, and the project of inclusive education. In this section, we conclude that school meritocracy cannot be considered as a viable model of social justice, particularly for students with special educational needs. Above, we argued that under the auspices of the apparent objectivity and neutrality of meritocracy, this very concept can itself serve ideological objectives of justifying an unequal system, resulting in heterogeneous practices among teachers and the underachievement of unprivileged students (Autin et al., 2019). Thus, the study of meritocracy needs to be reconsidered and recontextualized and we need to be particularly critical of its consequences on the functioning of individuals in society (Trevisan et al., 2021).

For Mijs (2016), one way to restore a principle of equity among individuals would be to consider the starting positions of groups and individuals so that they are compensated and/or

equalized. In doing so, an alternative to the current meritocratic model of education would be to compensate for students with low ability with greater investment in educational resources or to offer everyone the same educational opportunities of outcomes regardless of their respective ability (Pavie et al., 2021). However, in such a context, a “successful” inclusion would still mean that students with special educational needs would have to compete against their peers (Lloyd, 2008). Such a move would not protect successful students with educational accommodations from suffering a backlash effect (Rudman et al., 2012). The teachers would still find themselves drawn into the mechanisms of reproduction of inequalities directly linked to the existence of specialized structures and practices (Bastart et al., 2021; Dornbusch et al., 1996). Yet, special education researchers argue that the implementation of inclusive education goes beyond compensatory measures of repair, rehabilitation or academic success (Armstrong, 2005; Benjamin, 2002; Lloyd, 2008).

Indeed, according to Lloyd (2008), to develop a real inclusive system, the goal should be less concerned with compensating students with special educational needs but rather changing the nature of success as defined by educational systems: “a system in which outcomes and success are measured in this way is also, by its very nature, hostile to the notion of full participation by those who are identified as needing the allocation of additional valuable resources to support them in their struggle to achieve standards that they are unlikely to ultimately attain, especially when elements of competition are also added in the form of school ranking tables” (p. 229).

Yet, a reduction of the competitive norms at school could alleviate the pervasive effects of backlash and prove beneficial for minority and stigmatized social groups, such as students with special educational needs. In this perspective, neoliberal policies' growing impact on education in Western European nations could be a significant barrier in this regard (Butera et al., 2021; De Beco, 2018). Because this ideology aims to encourage competition and increase employment through the development of skills and the appreciation of merit, schools are expected to participate in the improvement of competitiveness and help produce economic growth by fostering students' abilities and skills in that direction³. As a result, rather than promoting access and participation for everyone, the role of education is centered on the development of “entrepreneurship” to enable students to satisfy their own needs by participating in capital markets (De Beco, 2018). As Apple (2001) stated, when the goals of education align with those of economic and social welfare, they include a reinforcement of intensely competitive structures of both inside and outside the school, as well as the expansion of the free-market discourse to justify these structures.

³ The particular features of the ideal learner are built on neoliberal discourses of self-control, flexibility, and individual responsibility, ideas that permeate many aspects of education policy (Bradbury, 2013).

Therefore, although the trend toward more inclusion has spread through most of the educational systems, it should be acknowledged that inclusive policies take place in a complex set of cultures, societies and classrooms, in which norms of competition are embedded, and it is crucial for research to identify the ideological barriers to their successful implementation (Butera et al., 2021; De Beco, 2018; Florian & Spratt, 2013). Therefore, to support this proposal, future research should dig deeper into the processes that support or restrain inclusive practices. For example, in the case of backlash effect, experimental research are particularly needed to help understand why and how, as mentioned previously, providing accommodations to students with special educational needs could be perceived as unfair and advantageous treatment as well as how to reduce such perceptions of injustice (Brueggemann et al., 2001; Paetzold, 2008). Indeed, despite recent reviews, empirical research on inclusive education remains scarce (Amor et al., 2018), and inclusion remains used interchangeably with integration and mainstreaming, which can hinder its comprehension and implementation (Nilholm, 2021).

“Implications for policy? A discussion through the specific situation of France

Finally, one might think that the inadequacy we have pointed here could question the relevance of the inclusive education policy for students with special educational needs. This is not our purpose. The United Nations members are committed, by 2030, “to build and upgrade [their] education facilities [to be] child, disability and gender sensitive and provide safe, nonviolent, inclusive and effective learning environments for all” and every country should be fully engaged to reach this goal.

If we focus on the specific situation of France as an example, we can note that the inclusive education policy has known several transformations within the last 20 years to allow students with special educational needs to fully participate in their schools. For instance, special classes progressively disappeared and students with special educational needs are now mostly registered in regular classrooms. While they can still benefit, according to their needs, from the support of a special education teacher for several hours regular teachers should now consider these students as “theirs” and change their practices. To sustain this policy, the Ministry of education makes continuous investments (in terms of staff, training or material). If our proposal does not question the legitimacy of the inclusive education policy though, it however invites to think through some choices that policy makers could made notably regarding the teachers’ training policy.

For example, it has been recently decided that every French pre-service teacher should receive a 25-hour class regarding inclusive education within their curriculum. This could be considered as a progress since teachers would now at least receive content that should help them to include the students with special educational needs. However, two criticisms could be made regarding this policy. First, it only represents 3% of the total training time to become an elementary teacher, a volume that could be considered as very low in comparison with the

challenge that including students with special educational needs represents. Second, this particular course within the curriculum can lead future teachers to believe that inclusive education is an addition to what they have to do on a daily basis. Thus, to help French teachers to build an appropriate conceptualization of inclusive education and better practices, we believe that they should be trained more hours and that this training should be disseminated within every class to address properly the challenge they face⁴.

Such a training would help teacher to better understand and implement inclusive education (Lautenbach & Heyder, 2019) and realize that the incompatibility pointed throughout this manuscript could impair their mission. As researchers, it is our responsibility to inform policymakers and practitioners, increase awareness of the ideological obstacles to inclusion and work toward its long-term realization. To achieve this objective, it is imperative to develop research that will accompany the training of teachers.

Conclusion

In this article, we propose that an ideological obstacle could restrain the implementation of inclusive settings in schools: an incompatibility between inclusive education for students with special educational needs and selection based on merit. We particularly argued that acknowledging and accommodating for special educational needs could conflict with the principle of “equality of opportunities” underlined by the selection function of school, which focuses on individual effort and performance. We presented the “backlash” effect as a system-justification tool used by individuals to justify and preserve social hierarchies, possibly threatened for instance when students with special educational needs succeed in settings that accommodate those requirements, rendering the selection to be perceived as unfair. Finally, we invite researchers to investigate the pervasive effects of the incompatibility between meritocracy and inclusive education of students with special educational needs to guide more efficiently policy makers within their choices. More empirical research is definitively needed to comprehend and overcome these challenges.

⁴ This proposition follows the guidelines of The Special Rapporteur on the rights of persons with disabilities (2019): “Provide training for all teachers, education professionals and school support workers on inclusive education and individualized support, and on how to create inclusive and accessible environments and give appropriate attention to each child's unique situation.”

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