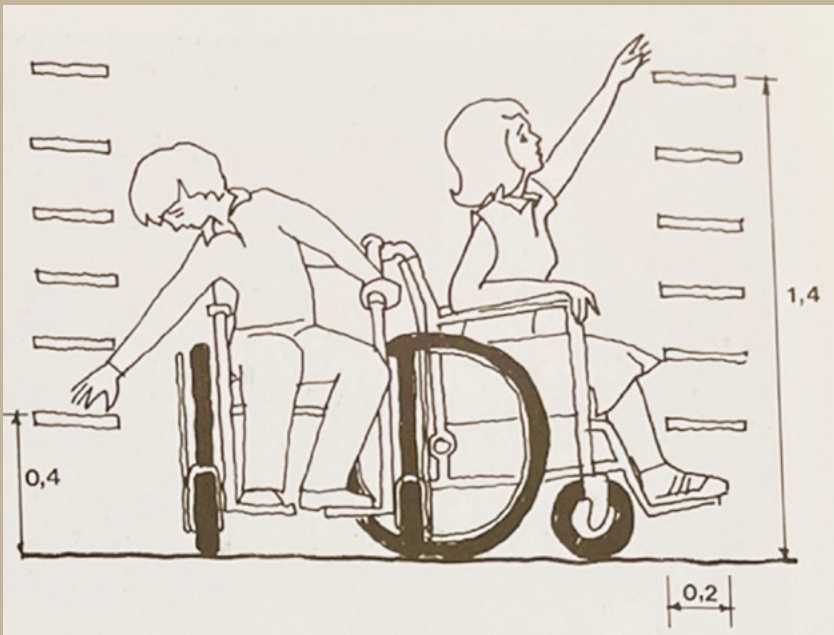


# Nordic Journal of Educational History



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Ed

SPECIAL ISSUE:  
EXPLORING THE HISTORY OF  
PUPILS WITH DISABILITIES IN  
WELFARE STATES

Edited by  
Anne Berg, Emma Laurin & Johanna Ringarp



# Nordic Journal of Educational History

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## INTRODUCTION

# Exploring the History of Pupils with Disabilities in Welfare States

*Anne Berg, Emma Laurin & Johanna Ringarp, special issue editors*

As European welfare states took shape during the first half of the twentieth century – particularly in the aftermath of the First World War and more decisively following the Second – the role of the state in securing minimum standards of living became increasingly institutionalised. Across Western Europe, governments assumed responsibility for social provisions, encompassing education, healthcare, and social security, typically financed through taxation. While the general principles of social endowments were widely shared – their function was to mitigate the consequences of industrial society for the wage-earning classes – the development of welfare regimes exhibited significant geographical variation.<sup>1</sup> In the Nordic countries, the welfare state was closely associated with ideals of social equality and universalism, whereas continental European models often reflected more conservative or corporatist traditions.<sup>2</sup>

Within this broader context, different countries developed specific education regimes. In Northern Europe, a “Nordic model of education” developed that was characterised by a strong commitment to universalism, egalitarianism, and strong state governance. Here, education was conceived as an integral part of the welfare state, aimed at promoting social cohesion, equal opportunities, and democratic participation. Comprehensive schooling systems replaced earlier segregated and parallel structures, and public education was expanded to ensure access for all children, regardless of social background.<sup>3</sup> In England, the post-war education system was formally committed to equality of opportunity yet remained marked by sorting mechanisms such as the tripartite system, which reinforced class divisions. In countries such as Germany and France, education was often shaped by corporatist or conservative welfare models, characterised by early tracking, selective secondary schooling, and a strong role for church or private providers alongside the state. Southern European systems, meanwhile, tended

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1 On the mitigating functions of welfare states, see esp. Asa Briggs, “The Welfare State in Historical Perspective,” *European Journal of Sociology* 2, no. 2 (1961), 221–58.

2 Gösta Esping-Andersen, *The Three Worlds of Welfare Capitalism* (Oxford: Polity Press, 1990).

3 Alfred Oftedal Telhaug, Odd Asbjørn Mediås, and Petter Aasen, “The Nordic Model in Education: Education as Part of the Political System in the Last 50 Years,” *Scandinavian Journal of Educational Research* 50, no. 3 (2006), 245–83.

to be more centralised and slower to expand access, with persistent inequalities linked to region and class. In contrast to the comprehensive and universalist approach of the Nordic countries, these systems frequently maintained differentiated pathways, which influenced both access to and the outcomes of education for various social groups.<sup>4</sup> The history of education for children with disabilities unfolded in the shadow of these welfare state formations.

For a long time, children with disabilities occupied a marginal position in both the history of education and welfare state historiography. Since the early 2000s, the educational history of children with disabilities has emerged as a distinct and expanding subfield within the broader history of education. This growing body of research has attracted increasing scholarly attention, reflecting a wider interest in the intersections of education, disability, and social policy. Disability studies have played a crucial role in reframing historical narratives, particularly through the development of the social model of disability. This model, which distinguishes between impairment and the disabling effects of social structures, has informed a wave of historical research that interrogates the institutional and ideological foundations of exclusion. Catherine Kudlik's influential article "Disability History: Why We Need Another 'Other'" called for a more nuanced and inclusive historiography, while scholars such as Kim Nielsen have demonstrated the centrality of disability to broader narratives of nation-building and social reform.<sup>5</sup>

Drawing on cultural and social history, disability studies and educational historiography, researchers have outlined the history of children with disabilities within educational and state systems. But the educational experiences of children with disabilities remain comparatively under-explored in the history of education, and especially that vein of historiography that centres on political history and the history of state formation.

In their introduction to the themed issue "Gaining Momentum," editors Pieter Verstraete, Maria Romeiras Amado, and Carlos Manique position the volume as a deliberate intervention in two flourishing but historically disconnected fields: disability history and the history of education. Despite earlier efforts – such as the 2005 special issue in *History of Education* and the 2012 ISCHE conference – these fields have largely remained in a "Living Apart Together" relationship.<sup>6</sup> The same argument, we advance, can be made for the fields of welfare state history and the educational history of children with disabilities.

There are several compelling reasons to direct scholarly attention to the intersection of welfare state formation, disability and education. Investigating the schooling of

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4 Marius R. Busemeyer and Rita Nikolai, "Education," in *The Oxford Handbook of the Welfare State*, ed. Francis G. Castles, Stephan Leibfried, Jane Lewis, Herbert Obinger, and Christopher Pierson (Oxford: Oxford University Press, 2010), 494–508; Glen O'Hara, "Planning the Education System in the Post-War Era," in *Governing Post-War Britain: The Paradoxes of Progress*, ed. Glen O'Hara (London: Palgrave Macmillan, 2012), 187–210.

5 Catherine J. Kudlick, "Disability History: Why We Need Another 'Other,'" *The American Historical Review* 108, no. 3 (2003), 763–93; Kim E. Nielsen, *A Disability History of the United States* (Boston: Beacon Press, 2012).

6 Pieter Verstraete, Maria Romeiras Amado, and Carlos Manique, "Paedagogica Historica Themed Issue: Gaining Momentum – New Cultural Histories of Education and Disability," *Paedagogica Historica* 60, no. 4 (2024), 587–91.

children with disabilities not only illuminates their educational experiences but also offers valuable insights into the historical development of state institutions and their modes of governance. Such studies reveal how, for instance, different welfare states over time have conceptualised disability, constructed educational provision, and negotiated the boundaries between education, care, control, and citizenship. In this respect, the history of education for children with disabilities becomes a lens through which broader changes in government administration and social policy can be examined.<sup>7</sup>

We can zoom in on one illustrative example. When the welfare state is discussed, Gøsta Esping-Andersen's theory of welfare regimes is frequently invoked. In his influential work *The Three Worlds of Welfare Capitalism* Esping-Andersen proposed a typology of welfare regimes that categorises advanced capitalist democracies into three ideal types. This classification is based on the degree of decommodification, patterns of social stratification, and the interaction between the state, the market, and the family in the provision and distribution of welfare. Firstly, there are liberal regimes, secondly, conservative or corporatist regimes, and thirdly, social democratic regimes, such as the Nordic countries, prioritise universalism, equality and a high degree of decommodification, and promote comprehensive social rights as part of citizenship.<sup>8</sup> While Esping-Andersen's typology has been widely cited it has also been the subject of sustained critique. A central criticism concerns the lack of a historical explanatory framework. His model is largely descriptive and static, offering a snapshot of welfare regime configurations without sufficiently addressing their historical development, including the influence of political coalitions, class struggles, and institutional legacies. Two additional critiques are particularly relevant to the theme of this special issue. First, the typology excludes Southern and Eastern European welfare states, which often do not fit neatly into the three ideal types. Second, and most pertinent to this issue's focus, the model has been criticised for its gender and normality biases. As Christoph Tszchanz argues, Esping-Andersen's framework centres on the "normal," able-bodied male worker as the default welfare subject, thereby neglecting the structural position and specific needs of people with disabilities.<sup>9</sup> This is but one example of how disability history can make us rethink theoretical models.

The educational history of children with disabilities can also make us rethink periodisation and rationalities of discipline and power in the history of education. During the period stretching from the late eighteenth century to the mid-twentieth century, children with disabilities were placed in self-sufficient institutions where care, school and work – the entire life cycle – were lived out in these isolated premises. They were managed and cared for according to the logic of an institutional paradigm. The paradigm aligned with the broader technologies of power characteristic of bourgeois society – its normalizing power techniques and its desire to place people of different class,

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7 This argument on disability policy and the experiences of disabled people as an analytical lens for broader considerations on the welfare state is inspired by Maria Björkman, "The Cost of Normalization: The Thalidomide Affected and the Welfare State," *Scandinavian Journal of History* 48, no. 3 (2022), 341–58.

8 Esping-Andersen (1990).

9 Christoph Tszchanz, "Disability Care Services Between Welfare Regime Pre-conditioning and Emancipatory Change to Independent Living: A Comparison of 10 European Cases with Fuzzy Set Ideal-Type Analysis," *ALTER – European Journal of Disability Research* 16, no. 4 (2022), 53–72.

gender and abilities in different parallel universes.<sup>10</sup> The logic of state policy during this period was grounded in separation, exclusion, and the isolation of children categorised as different. The emergence of specialised institutions for children with disabilities – such as institutions for the blind, deaf, lame and those labelled as “feeble-minded” – reflected broader processes of severance, underscored by medicalisation and bipolarisation. These institutions were often framed as philanthropic, emphatic or progressive, yet they also served to segregate and regulate disabled bodies within the expanding bureaucratic apparatus of the modern state.<sup>11</sup> Scholars such as David Wright have shown how the rise of “idiot asylums” in Britain was closely tied to the development of state-sponsored welfare and the consolidation of medical authority.<sup>12</sup> Similarly, Anne Borsay’s *Disability and Social Policy in Britain since 1750* has traced the shifting boundaries between care, control, and education in the treatment of disabled people against the background of industrialisation, medicalisation and social policies.<sup>13</sup>

During the post-war period, the traditional institutional system began to be reformed and dismantled. New political frames urging for integration, normalisation, inclusion, equal opportunity, and impaired children’s rights to education and work, spread across Europe.<sup>14</sup> How can we characterise what came after the institutional paradigm? Perhaps we can speak of an integration paradigm, as more and more children were demonstrably transferred from institutions to the ordinary school system. But at the same time, it is problematic to borrow labels from the policy documents of the time. The post-war period however marked a turning point in both the provision and conceptualisation of education for disabled children. The consolidation of welfare states brought new resources and ambitions for universal provision, yet educational programmes remained uneven and contested regarding children with disabilities. The uneven experience of war and conflict, to name one factor, influenced the state policy on disabled children and adults. Deborah Cohen highlights how Britain as well as Germany grappled with the reintegration of disabled veterans – a process that influenced broader debates and policies about disability and citizenship.<sup>15</sup> Notwithstanding the rhetoric of universality and equal opportunity, the actual reform and implementation of educational provision for children with intellectual, physical or mobility disabilities seem to have varied considerably across European countries, shaped by shifting

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10 Johanna Ringarp, “Institutional Care and Education: Circulation of Knowledge About Epilepsy in Sweden 1915–40,” *Medical History* 68, no. 3 (2024), 325–40; Anne Berg, “Mobility Disability, Education and the Welfare State: Policy-Making and the Integration of Children with Mobility Disabilities into the Public School System in Post-War Sweden,” *History of Education* (online first, 2025).

11 Thomas Barow, “Undesirable Citizens: Education, Care and Control of the ‘Feeble-Minded’ in the Swedish Province of Malmöhus, 1900–1950,” *ALTER – European Journal of Disability Research* 5, no. 2 (2011), 104–15.

12 David Wright, *Mental Disability in Victorian England: The Earlswood Asylum 1847–1901* (Oxford: Oxford University Press, 2001).

13 Anne Borsay, *Disability and Social Policy in Britain Since 1750: A History of Exclusion* (Hampshire: Palgrave Macmillan, 2005).

14 Lise Vislie, “From Integration to Inclusion: Focusing Global Trends and Changes in the Western European Countries,” *European Journal of Special Needs Education* 18, no. 2 (2003), 17–35.

15 Deborah Cohen, *The War Come Home: Disabled Veterans in Britain and Germany, 1914–1939* (Oakland: University of California Press, 2001).

medical, pedagogical, and social policy frameworks.<sup>16</sup> The post-war decades also saw significant transformations in how disability was understood and addressed within welfare states. Medical models, which framed disability primarily as a deficit to be treated or managed, coexisted with emerging sociological approaches that emphasised individual potential and social integration. At the same time, parents and advocacy groups began to challenge exclusionary practices and demand educational rights for their children, contributing to gradual shifts in policy and provision.

Welfare societies' handling of disabled children's schooling is still difficult to grasp and synthesise if we want to go beyond the concepts of the time. Our knowledge remains limited regarding how processes of integration, inclusion, or mainstreaming of pupils with disabilities were implemented across different state systems, and what material and discursive conditions shaped their outcomes. Against this background, this special issue explores how and why the schooling of children with disabilities was restructured and institutionalised, framed and legitimised, within different twentieth-century welfare state systems. More precisely, the special issue contains six articles that, in different ways, strengthen our knowledge about the educational history of children with disabilities in relation to changing welfare regimes during the century. Three of the studies examine the opportunities available to persons with disabilities within the framework of the Nordic welfare state model. Two focus on Switzerland, which can be defined as a post-liberal welfare regime. The final study explores the situation of persons with disabilities in Germany, Romania, and Russia. Together, the articles in this issue aim to deepen our understanding of the historical relationship between disability and education, and to situate these developments within the broader context of welfare state formation and transformation.

In arranging the contributions, we have chosen a geographical structure that also reflects different welfare state models. This organisation underscores how national contexts and welfare regimes shaped the possibilities and limits of education for disabled pupils, while also inviting comparative reflection across diverse settings.

The Nordic articles show how ambitions of equality were continually negotiated in practice, as strong political commitments to inclusion coexisted with persistent processes of classification, professional interpretation, and labour-market regulation. In the article "Tracing the biologicistic ability paradigm in Danish special education: A historical inquiry into three Danish welfare state contexts, 1923–2023" Christian Ydesen and Bjørn F. Hamre offers a diachronic and comparative analysis of how biologicistic notions of intelligence and ability have shaped Danish special education across three key welfare state contexts: the interwar period, the post-war era, and the contemporary moment. Drawing on Foucault's concept of dispositives – discipline, security, and optimisation – the authors examine how scientific discourses such as psychology, psychiatry, and psychotechnics have been mobilised to classify, differentiate, and govern students within the Danish education system.

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16 See e.g. Margret A. Winzer, *The History of Special Education: From Isolation to Integration* (Washington: Gallaudet University Press, 1993); Jameel Hampton, *Disability and the Welfare State in Britain: Changes in Perception and Policy 1948–79* (Bristol: Policy Press, 2016). Also see the edited volume by Len Barton and Felicity Armstrong, eds., *Policy, Experience and Change: Cross-Cultural Reflections on Inclusive Education* (Dordrecht: Springer, 2007).

The article argues that the biologicistic ability paradigm has functioned as a persistent technology of governance, influencing both inclusion and exclusion in education. It shows how the Danish welfare state has historically used education not only to promote equality but also to manage population diversity through biologically grounded classifications. In the contemporary context, the reintroduction of IQ screening for gifted children reflects a shift from universalist ideals toward individual optimisation and competitiveness, aligned with the logic of the “competition state.” By tracing these developments, the article contributes to understanding how biologicistic reasoning has shaped the evolving relationship between education and welfare governance in Denmark.

Whereas Ydesen and Hamre trace the persistence of biologicistic reasoning across a century, Thom Axelsson and Anna Larsson offer a more concentrated study of how Swedish professionals in the 1940s–1970s interpreted pupils’ absence from school. In the article “Truancy, school phobia, or school fatigue? Understandings of students’ absenteeism, 1945–1975” the authors show that the reasons for school absenteeism have varied over time. By using documents written by, among others, experts in the field of psychology, the article critically analyses how different professional groups interpreted and reacted to truancy, revealing both continuity and change over time in the prevailing concept of psychoculture. According to the authors, the concept refers to a way of thinking that has been shaped by the language and ideas of psychology, psychiatry and psychoanalysis.

During the 1940s and 1950s, the cause was considered to be problems with obedience or maturity. In the following decades, the same absenteeism was attributed to anxiety problems (1960s) and, in the 1970s, to dissatisfaction. The terms used to describe school absenteeism also changed over time. The term truancy was often used in the 1940s and 1950s to describe school absenteeism, regardless of its underlying cause, and was often presented as a moral issue: a student who was absent without a valid reason was considered to be neglecting their duty and thus behaving inappropriately. In the 1960s, school absenteeism was described using the term “school phobia,” while in the 1970s it was seen more as an expression of dissatisfaction. The description of dissatisfaction meant that less emphasis was placed on constitutional factors and opened up the psychocultural framework for interpretations that placed the cause of absenteeism in the school environment rather than in the individual student. During the same period (the 1970s), exemptions from school attendance in favour of internships or extended practical training became a common measure. Their conclusion is that the interpretation of absence has historically been dependent on institutional structures, professional agendas and available intervention methods.

In the following article “Needed and Valuable Instead of Just Being Employed:” Vocational Training, Work and Social Usefulness Regarding People with Intellectual Disability in Sweden, 1945–1989” by Thomas Barow the focus shifts from school to employment opportunities for people with what we today refer to as intellectual disability. Barow uses the concept of intellectual disability as an umbrella term for a heterogeneous group of people whose commonality lies in the vague assumption that they are unlikely to achieve the learning objectives of regular primary education. Analytically the article is based on the concept of employability and what significance it has had historically for a marginalised group. Barow particularly highlights the complex-

ity surrounding the discussion of work and employment for people with intellectual disabilities during a period in the welfare state that has otherwise been described as inclusive and progressive. However, for people with intellectual disabilities, the expansion of the welfare state did not have the same significance in terms of opportunities for work and education but instead led to (continued) marginalisation.

Taken together, the Nordic studies illustrate both the ambitions and contradictions of the Nordic model of welfare. The issue next examines Switzerland, where different welfare state logics shaped the historical trajectory of education for disabled pupils.

In the article “From segregation to inclusion: Special needs education and the transformation of the Swiss welfare state” Michèle Hofmann and Lukas Boser explore the historical relationship between special needs education and the development of the Swiss welfare state, tracing the shift from segregated schooling to inclusive education from the late nineteenth century to the present. Hofmann and Boser argue that both segregation and inclusion are deeply embedded in the logic of the welfare state, which seeks to integrate individuals into society while managing public expenditure.

Using a rich historical source base and a knowledge-historical approach, the authors show how medico-statistical classifications and actuarial thinking shaped early welfare policies, leading to the institutionalisation of special education for “abnormal” children. They demonstrate how statistical surveys and pedagogical expertise contributed to the categorisation and separation of children, legitimising state intervention. In the post-war and contemporary periods, inclusive education emerged as a new ideal, yet its implementation remains uneven and contested. The article highlights how meritocratic principles and cost-efficiency continue to influence educational policy, complicating the realisation of inclusive schooling. Ultimately, the authors argue that the transformation from segregation to inclusion reflects not a rupture, but a reconfiguration of welfare state rationalities, where both models serve similar goals of social integration and fiscal sustainability.

While Hofmann and Boser provide a long-term perspective on segregation and inclusion, Michael Geiss turns to the late twentieth century and examines the role of educational technologies in shaping participation. In the article “Special tools: educational technologies for children and adults with disabilities in Switzerland, 1970s to 1990s,” Geiss investigates the history of computer-based technologies for children and adults with disabilities in Switzerland. Drawing on historical institutionalism the analysis shows how assistive technologies and educational software initially emerged from bottom-up initiatives led by disability organisations, foundations, educators and dedicated technical experts at the regional level. Early efforts concentrated on hardware for people with physical disabilities, offering new educational opportunities. The development of software for people with intellectual disabilities proved far more challenging. Rather than being guided by utopian visions, these initiatives were pragmatic in orientation and aimed at directly fostering participation. To sustain progress collaboration was eventually sought with national stakeholders and the issue of specialised hardware and software for people with disabilities became a national policy issue in the final decades of the twentieth century. Yet the overall impact remained limited, revealing constraints of educational policy in a post-liberal welfare state.

Finally, the issue expands its scope eastward to explore the legacy of Vygotsky’s Defectology, situating debates on disability and education within the context of state

socialism and its transnational reverberations. The article “In the Shadows of the Iron Curtain: The Forgotten Legacy of Vygotsky’s Defectology,” by Radu Dinu and Laura Elena Runceanu, delves into Vygotsky’s contributions to disability studies and special education, gathered under the term “defectology.” Drawing on a literature review and interviews with scholars in Germany, Romania, and Russia it reconstructs the conceptual history of “defectology” and traces its varied reception across different political and cultural settings. In state-socialist countries, Vygotsky’s inclusive and humanitarian approach was often overshadowed by segregationist traditions in special education, though his ideas experienced a revival in the Soviet Union during the late 1980s. In Romania, defectology remained marginal compared to his other theories, while in West Germany it was taken up in a politicised climate where it informed challenges to segregationist practices but also encountered institutional resistance. The authors conclude that, despite its negative connotations, Vygotsky’s Defectology remains a dynamic framework that continues to shape contemporary debates on disability, special education and inclusion.

Collectively, the contributions to this special issue illuminate several shared tendencies in how European welfare states have historically approached the education of children classified as disabled. The shift from segregated to integrated schooling, for example, did not occur uniformly across Europe, and often involved complex negotiations between parents, disability organisations, professionals, and policymakers. Across diverse national contexts, education has functioned not only as a site of inclusion but also as a mechanism for classification, differentiation, and governance. Whether through biologicistic paradigms in Denmark or medico-statistical reasoning in Switzerland, the welfare state has consistently mobilised expert knowledge to define and manage educational differences.

Another recurring theme is the tension between egalitarian ideals and the enduring influence of meritocratic and cost-efficiency logics. As several articles demonstrate, integrated education has frequently been framed as a democratic imperative, yet its implementation remains uneven and contested – shaped by fiscal constraints, diagnostic cultures, and institutional inertia. Across the cases, we see both continuity and change: persistent reliance on expert knowledge and categorisation, but also evolving interpretations of disability, education, and participation. The transition from segregation to inclusion, as Hofmann and Boser argue, does not represent a rupture but rather a reconfiguration of welfare state rationalities, wherein both models pursue similar objectives of social integration and economic sustainability. Moreover, the articles underscore how disability and education have been entangled with broader societal projects – from nation-building and labour market participation to technological innovation and civil rights. Whether examining vocational training, assistive technologies, or the legacy of Vygotsky’s Defectology, the contributions highlight the need to historicise educational transformations within the shifting political, cultural, and epistemic landscapes of the welfare state. Lastly, integration, inclusion, and normalisation, as ideas and policy concepts, has clearly played a role in most of these cases, but so has economic possibilities and professional conflicts.

By foregrounding these shared dynamics, this special issue contributes to a growing body of scholarship that seeks to bridge the fields of disability history and educational history. It invites further reflection on how welfare states – be they liberal, post-liberal,

neoliberal, conservative or social democratic – have shaped and continue to shape the educational trajectories of disabled children, not only through policies and institutions, but through the very categories and expectations that define what it means to learn, to belong, and to be included. Our belief is that the articles underlines that the historical relationship between disability and education continues to challenge conventional periodisation and concepts within both educational history and welfare state research.

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## Tracing the Biologistic Ability Paradigm in Danish Special Education: A Historical Inquiry into Three Danish Welfare State Contexts, 1923–2023

Christian Ydesen & Bjørn F. Hamre

**Abstract** • This article explores the role of the biologistic ability paradigm in Danish special education across three historical contexts (1923–2023). It examines how biologistic notions of intelligence and ability have shaped educational policies and practices within the Danish welfare state. Using a diachronic and comparative approach, the study highlights shifts in how special education has been used to classify, optimise, and manage population diversity. It discusses the influence of psychology, psychiatry, and IQ testing in shaping student differentiation and governance. The article argues that contemporary policies on gifted education and intelligence screening reflect a reconfiguration of biologistic reasoning, aligning with broader shifts toward competitiveness and individual optimisation in education. Ultimately, it demonstrates how biologistic ability paradigms have evolved as tools of governance, influencing both inclusivity and exclusion within the educational system.

**Keywords** • biologistic ability paradigm, special education, IQ testing, Danish welfare state, educational governance, psychiatry, childpsychiatry

### Introduction

The creation, consolidation, and transformation of the Danish welfare state during the interwar, post-war, and contemporary periods illustrate a recurring concern with population management. Education, particularly special education, has been a crucial area for the development and refinement of governing practices aimed at identifying, categorising, and hierarchising different “kinds of people.”<sup>1</sup>

The Danish welfare system is traditionally considered part of the Nordic family of universal – or social democratic – welfare states.<sup>2</sup> Historically, the Nordic welfare states have integrated education as one of their central pillars, alongside free healthcare,

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- 1 Thomas S. Popkewitz, *Cosmopolitanism and the Age of School Reform: Science, Education, and Making Society by Making the Child* (New York: Routledge, 2008); Bjørn F. Hamre, *Potentialitet og optimering i skolen: problemforståelser og forskelssetninger af elever – en nutidshistorisk analyse* (Copenhagen: Department of Education and Pedagogy, Aarhus University, 2012a); Christian Ydesen, *The Rise of High-Stakes Educational Testing in Denmark, 1920–1970* (Frankfurt am Main: Peter Lang, 2011).
- 2 Gøsta Esping-Andersen, *The Three Worlds of Welfare Capitalism* (Cambridge: Polity Press, 1990).

social security, and universal retirement benefits, to provide public welfare services with universal coverage for their populations.<sup>3</sup>

The Nordic education systems originated from a political vision of establishing free and accessible comprehensive schooling for all, with a continuous pathway through the educational system for the entire population. This vision of a *Folkeskole* – a public school for the people – emerged in Denmark with the 1899 Education Act, which replaced the former *almueskole* – the common school – and was deeply rooted in broader political concerns about nation-building.<sup>4</sup> As the number of enrolled pupils in comprehensive schools increased from around 1900 onwards, the need for differentiation arose. Consequently, special schooling and addressing the needs of so-called “backward” children became key concerns in Nordic education systems. The special school came to be regarded as “the extreme outpost” of the *Folkeskole*, serving the “residual group” – children who did not fit into mainstream schools.<sup>5</sup>

This development can be seen as the reflection of a political and societal concern with categorising and taxonomising the population based on biological potentials.<sup>6</sup> This is, among other places, reflected in the Danish Ministerial People Commission launched in 1935, the architect of which was the Social Democratic minister for social affairs Karl Kristian Steincke (1880–1963).<sup>7</sup>

This style of reasoning – which we refer to as the biologicistic ability paradigm – belongs to the category of biologisms, a common term for approaches that use biology as the foundation for interpreting the world. Central to these ideas is the concept of human evolutionary progress and the belief that physical traits can be scientifically measured, with this data then informing policies and practices.<sup>8</sup> For instance, biologicistic educational theory asserts that educational practices and theories can be scientifically developed based on our understanding of the human body, brain or genes.

3 Christian Ydesen and Mette Buchardt, “Citizen Ideals and Education in Nordic Welfare State School Reforms,” in *Oxford Research Encyclopedia of Education* (Oxford: Oxford University Press, 2020).

4 Anne Katrine Gjerløff and Anette Faye Jacobsen, “Da skolen blev sat i system 1850–1920,” in *Dansk Skolehistorie 3. Hverdag, vilkår og visioner gennem 500 år*, ed. Charlotte Appel and Ning de Coninck-Smith (Aarhus: Aarhus University Press, 2014).

5 Bjørn F. Hamre, “Den yderste halespids bekymring som dispositiv i skolens problemforståelser og forskellssætninger,” *Uddannelseshistorie* 46 (2012b), 70–94; Christian Ydesen, Brit Marie Hovland, and Emma Vikström, “The Scandinavian Space of IQ Testing: Between Normal and Special Education, 1918–1940,” in *Historicizing IQ Testing: Intelligence Assessments and their Role in Norwegian Society from the 1900s to the Present*, ed. Jon R. Kyllingstad and Håkon A. Caspersen (Cambridge: Open Book Publishers, 2025).

6 Bjørn F. Hamre, “Optimization as a Dispositive in the Production of Differences in Denmark Schools,” *European Education* 45, no. 4 (2013), 7–25; Bjørn F. Hamre, “Doing Dispositive Analysis on Educational Policy: Applying Inclusive Politics as an Example,” in *Thinking with Michel Foucault in Educational Leadership: Methodological and Conceptual Challenges*, ed. Richard Niesche and Denise Mifsud (New York: Bloomsbury Academic, 2025a).

7 The new social legislation emerging from the People’s Commission clearly contained elements indicating that eugenics was actively used as a tool to “improve” the Danish population at that time. See Bjørn F. Hamre, Christian Ydesen, and Simon Holleufer, “Eugenische Ideen in Dänemark vor, während und nach der deutschen Besetzung,” in *Die “Minderwertigen” – Behinderung im Faschismus*, ed. Sieglind Luise Ellger-Rüttgardt (Stuttgart: Kohlhammer, forthcoming in 2026).

8 The term “biologism” appears as an entry in the *Deutsches Fremdwörterbuch* as early as 1912. Philosophically, biologism can be described as a form of monistic materialism that regards all there is as matter. Jes Fabricius Møller, “Biologism,” *Den jyske historiker* 112 (2006), 8–20.

Current research on policies and practices related to special education – particularly the use of IQ testing – within the framework of the Danish welfare state has provided profound insights into the political, pedagogical, institutional, and international dimensions of these phenomena.<sup>9</sup> These studies have examined specific historical periods and institutional settings in detail, often from pedagogical or psychological perspectives.<sup>10</sup> However, what remains largely absent is a broader, diachronic perspective – a helicopter view – that connects these developments in new ways while also recognising human biology as a recurring subject and rationale for intervention. Such an approach could illuminate recurring patterns and shifts in the biologically grounded mechanisms of governance within the welfare state, particularly in how population diversity has been managed to serve political objectives. From these opening reflections and observations, this article addresses the following overarching research question: How can we understand the role and significance of the biologistic ability paradigm in the formation and development of the Danish welfare state from the interwar years to the present?

Specifically, we examine three distinct and diachronic contexts within Danish education history where boundary work between mainstream and special education, rooted in biologistic notions of ability, has emerged and played a crucial role in establishing order.

By analysing these contexts diachronically and comparatively across three cases (one interwar, one post-war, and one contemporary), this article enhances our understanding of evolving welfare state regimes. It provides insights into how a shifting and reconfiguring biologistic ability paradigm has manifested in various forms while simultaneously influencing and shaping ideas about the public good as a fundamental aspect of welfare state development.<sup>11</sup>

### Theory, methodology and article structure

In our theoretical approach to the research question, we employ the concept of the dispositive as articulated in Michel Foucault's writings and subsequent interpretations of his work.<sup>12</sup> We analyse our material through three distinct but interrelated dispositives: the discipline dispositive, the security dispositive, and the optimisation dispo-

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9 See, for example, Christian Ydesen, Kari Ludvigsen, and Christian Lundahl, "Creating an Educational Testing Profession in Norway, Sweden and Denmark, 1910–1960," *European Educational Research Journal* 12, no. 1 (2013), 120–38.

10 See, for example, Ning de Coninck-Smith, *For barnets skyld: Byen, skolen og barndommen 1880–1914*, (Copenhagen: Gyldendal, 2000); Carsten Bendixen, *Psykologiske teorier om intelligens og folkeskolens elevdifferentiering: En analyse af transformationen af psykologiske teorier om intelligens som baggrund for skole-psykologiske og pædagogiske afgørelser vedrørende elevdifferentiering i det 20. århundredes folkeskole* (Roskilde: Roskilde University Centre, 2006); Bjørn F. Hamre, Thom Axelson and Kari Ludvigsen, "Psychiatry in the Sorting of Schoolchildren in Scandinavia 1920–1950: IQ Testing, Child Guidance Clinics and Hospitalization," *Paedagogica Historica* 55, no. 3 (2019), 391–415.

11 Trine Øland et al., *Statecrafting on the Fringes: Studies of Welfare Work Addressing the Other* (Copenhagen: Museum Tusulanum Press, 2019).

12 Michel Foucault, *Security, Territory, Population: Lectures at the Collège de France, 1977–78*, ed. Michel Senellart, François Ewald, and Alessandro Fontana, trans. Graham Burchell (New York: Palgrave Macmillan, 2009).

itive.<sup>13</sup> These dispositives serve as analytical tools to untangle the biologicistic ability paradigm and its role in shaping the Danish welfare state.

The discipline dispositive is central to explaining governance in the emergence of the modern welfare state. It refers to the establishment of societal norms, such as those defining what it means to be a reasonable citizen or student. Norming processes – such as defining who is deemed “right,” “usable,” or “gifted” – have been integral to educational reforms since the eighteenth century. These processes set standards for behaviour, shaping the future by producing desirable subjects through regulation and control.<sup>14</sup>

In our analysis, we use the discipline dispositive to examine the demands for general knowledge within the education system and society. This includes expectations regarding how individuals are recognised as good students and the criteria by which they are assessed. The disciplinary mechanisms embedded in education reinforce societal standards of reasonability and desirability, conditioning students to conform to predetermined norms.<sup>15</sup> Within the context of the Danish welfare state, the biologicistic ability paradigm has historically contributed to defining these norms by linking individual potential to inherited or innate capacities, thus shaping educational trajectories and institutional practices.

The security dispositive focuses on managing unforeseen events and behaviours that challenge established norms. It operates through normalisation, wherein the unexpected or problematic is rendered intelligible and manageable. Technologies of securitisation play a crucial role in mitigating risks, such as epidemics or delinquency, by pre-emptively controlling potential disruptions to societal stability.<sup>16</sup>

Our analysis employs the security dispositive to understand the role of special education as a practice designed to address deviations from expected societal norms. Special education, within the Danish welfare state, functions as a form of securitisation – anticipating that some children will not meet normative expectations and thereby institutionalising responses to such deviations. This logic for mitigating deficiency is often informed by bell-curve thinking, which assumes that achievement is normally distributed, with most children meeting expectations and a minority either exceeding or failing them.<sup>17</sup> The biologicistic ability paradigm has played a significant role in shaping how educational systems identify and manage at-risk students, reinforcing policies that aim to contain and mitigate deviations from the norm through differentiated schooling and support structures.

The optimisation dispositive extends beyond norming and normalisation to encompass the enhancement of individual and collective potential. It is concerned with opti-

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13 Bjørn F. Hamre, Anne Morin, and Christian Ydesen, eds., *Testing and Inclusive Schooling: International Challenges and Opportunities* (London: Routledge, 2018).

14 Foucault (2009), 56.

15 Foucault (2009), 57.

16 Foucault (2009), 58–59.

17 Roger Slee, “How Do We Make Inclusive Education Happen When Exclusion is a Political Predisposition?” *International Journal of Inclusive Education* 17, no. 8 (2013), 895–907; Bjørn F. Hamre, “Inclusion and the Management of Diversity in the Danish Welfare State,” in *Who’s In? Who’s Out? What to Do About Inclusive Education*, ed. Marnie Best, Tim Corcoran, and Roger Slee (Brill: Sense Publishing, 2018), 33–46.

mising human and economic potential to achieve future prosperity. This dispositive integrates biological notions of human optimisation with progressive educational ideas and economic strategies aimed at maximising the efficiency of populations, states, and individuals.<sup>18</sup>

Our analysis highlights how biological optimisation is a pervasive dynamic that manifests in different ways across historical and institutional contexts. Within the Danish welfare state, the biologistic ability paradigm has contributed to shaping policies that seek to optimise both individual capacities and societal prosperity. The optimisation dispositive thus frames educational initiatives as instruments for fostering economic growth and shaping individuals into productive members of society.<sup>19</sup> In this sense, we explore how the biologistic imaginary has influenced educational policies that seek to enhance human capital while maintaining social cohesion.

These three dispositives – discipline, security, and optimisation – function in interrelated ways to shape educational policies and practices. The discipline dispositive establishes and reinforces societal norms, the security dispositive anticipates and manages deviations from these norms, and the optimisation dispositive seeks to enhance human and economic potential. By applying these analytical lenses, we demonstrate how the biologistic ability paradigm has been instrumental in shaping the formation and development of the Danish welfare state from the interwar years to today.

In line with Foucault, we identify the bell curve as a crucial technology for illustrating the distribution of students according to their individual skills and knowledge.<sup>20</sup> This perspective aligns with Tomlinson, who argues that mass education systems have always been “hierarchical, differentiated in terms of wealth and status, dependent on ideological assumptions of normality and ability, and thus inevitably exclusive, however much this is disguised.”<sup>21</sup> Tomlinson provides numerous examples to show how “the Platonic myth that children are born as gold, silver, iron, or brass has long served elite groups who need rationalisations and ideological justification for treating children differently based on social class, race and ethnicity, and disability.”<sup>22</sup> Therefore, the aim of this article is to explore the evolving configurations of less, normally, and highly gifted students by analysing the imaginaries surrounding biology and ability in the formation and development of the Danish welfare state from the interwar years to the present.

Our analytical journey begins in the interwar years, focusing on the Education Psychology Study Commission (*Udvalget for Skolepsykologiske Undersøgelser*), established in 1924. This commission played a pivotal role in the development of IQ testing and educational psychology in Denmark, serving as a hub for leading proponents of intelligence testing.<sup>23</sup> As a private organisation with close ties to teacher unions and the

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18 Hamre (2012a).

19 Hamre (2025a).

20 Foucault (2009).

21 Sally Tomlinson, *A Sociology of Special and Inclusive Education: Exploring the Manufacture of Inability* (New York: Routledge, 2017), 60.

22 Tomlinson (2017), 62.

23 Frederik Forrai Ørskov and Christian Ydesen, “Playing the Game of IQ Testing in England and Denmark in the 1930s–1960s: A Socio-Material Perspective,” *Oxford Review of Education* 44, no. 5 (2018), 599–615.

government, it provides a valuable lens for examining the interplay between scientific knowledge and political decision-making. Our analysis draws on historical publications, official documents from the Danish National Archives, and articles from the Nordic journal *Hjælpskolan/Værneskolen/Særskolen* (1923–1940) to reconstruct the commission's role in shaping policies and practices in educational psychology.

The post-war period, by contrast, is explored through a different type of institutional context: the expansion of special education in Copenhagen and the broader professionalisation of educational psychology. This period is characterised by new institutional arrangements, such as consultant services, observation colonies, and an increasing reliance on child psychiatrists in the assessment of schoolchildren. Unlike the inter-war commission, which reflects high-level policy deliberations, this case highlights the everyday professional work of defining and managing children's abilities. Here, the emergence of psychiatry alongside educational psychology marks an important shift in the classification of children, with psychiatrists diagnosing those whom psychological assessments alone could not fully account for. Additionally, the Psychotechnical Institute, which employed applied psychology, was another key institution shaping how practical and academic abilities were distinguished. Taken together, these professional networks illustrate how post-war institutions constructed new categories of ability and disability, optimising children for different educational and occupational trajectories.

The contemporary case illustrates a different kind of development: the introduction of a new evaluation and assessment system in Danish public schools, which mandates screening for high intelligence (giftedness) among all first graders starting in the 2024/2025 school year.<sup>24</sup> This case does not centre on a specific commission or professional network but instead reflects the translation of concerns about biology and ability into large-scale policy and practice. Unlike the previous cases, where expertise was concentrated in commissions or professional institutions, this contemporary shift embeds assessment directly into the school system's structure, making intelligence screening an element of early education. To analyse this case, we rely on policy documents and contemporary research publications, which offer insight into how intelligence is conceptualised and operationalised in today's educational landscape.

Crucially, these three cases can be seen as manifestations of the biologicistic ability paradigm, but they illustrate different mechanisms through which scientific knowledge about intelligence and ability has been institutionalised in Danish education over time. The first case highlights the relationship between scientific expertise and political decision-making, the second emphasises the role of professional networks in defining and managing educational classifications, and the third explores the large-scale policy implementation of intelligence assessment. This variation allows us to trace continuity and change in how different actors – commissions, professional communities, and policymakers – have constructed the meaning of intelligence and ability in different historical contexts.

At the same time, the differences between these cases necessitate a critical reflection on the sources used. Each type of source – commission protocols, institutional

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<sup>24</sup> Danish Ministry for Children and Education, "Aftale om det fremtidige evaluerings- og bedømmelsessystem i folkeskolen," October 29, 2021. <https://www.uvm.dk/-/media/filer/uvm/aktuelt/pdf21/okt/211029-aftale-om-det-fremtidige-evaluerings-og-bedoemmelssystem-i-folkeskolen.pdf>.

records, professional journals, and contemporary policy documents – offers distinct perspectives and is shaped by being intended for different audiences and purposes. Commission records provide insight into elite decision-making but may obscure broader professional debates or public reactions. Institutional documents and records of professional networks allow us to trace the practices of psychologists and psychiatrists but may not capture how children and families experienced them. Contemporary policy documents, meanwhile, represent formalised statements of intent but do not necessarily reveal how intelligence screening is implemented in practice. Acknowledging these limitations, our analysis remains attuned to both the possibilities and constraints of the available sources, ensuring a nuanced understanding of the historical trajectory of the biologistic ability paradigm in Denmark.

### **Interwar case**

The Educational Psychology Study Commission was established in 1924 in the Department of Applied Psychology at the University of Copenhagen. It included prominent representatives from all major educational institutions in Denmark, including teachers' unions.<sup>25</sup> The commission's primary objective was to develop various types of assessments, such as standardised achievement and vocational tests. In 1925, the commission launched its seminal work on a Danish standardisation of the Binet-Simon intelligence test, which eventually came out in 1930. This publication was pivotal in the emergence of educational psychology as a distinct profession within the Danish education system. It also facilitated the establishment of educational psychology offices in Danish municipalities in the following years and positioned educational psychology as a key intermediary between mainstream and special education.<sup>26</sup>

From its inception, the commission maintained strong political connections, including among its board members figures such as MP Vilhelm Rasmussen (1869–1939), who also served as the headmaster of the Royal Danish School of Education, and Johs. Søgaard, an MP and head teacher.<sup>27</sup> Additionally, the commission collaborated closely with the Ministry of Education on test development and the distribution of tests to schools. In 1925, the commission even proposed to the ministry that selected items

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25 Udvalget for Skolepsykologiske Undersøgelser, Virksomheden 1924–1927, folder 8, duplicates, clippings etc. from the years 1927–1952, 1.1.1.7. Foreningen for Experimental Paedagogik II 1913, Historisk-Paedagogisk Studiesamling 2924, Danish National Archive (Rigsarkivet).

26 The establishment of educational psychology offices in Danish municipalities was a gradual process, beginning with Frederiksberg in 1934, followed by Copenhagen in 1935, and Gentofte in 1937. By 1944, these three municipalities in the capital region remained the only ones with formally established educational psychology offices. However, after the end of the German occupation in 1945, the pace of establishment accelerated. By 1949, educational psychology offices had been set up in the major provincial towns of Esbjerg, Aarhus, Odense, Horsens, Frederikshavn, and Aalborg. Ydesen (2011).

27 Udvalget for Skolepsykologiske Undersøgelser, Protocol for Aarene 1924–1946, folder 5, Foreningen for Experimental Paedagogik I 1913, Historisk-Paedagogisk Studiesamling 2924, Danish National Archive (Rigsarkivet).

from an IQ test be included in the upcoming middle school entrance exam. This initiative aimed to gather data and gain experience with the use of IQ tests in Denmark.<sup>28</sup>

The commission was funded through a mix of public and quasi-public sources, including contributions from the government, municipalities, and teachers' unions. This diverse funding base highlights the commission's broad support and its significant ties to government entities and the early architects of the Danish welfare state.

To fully comprehend the establishment and functioning of the Educational Psychology Study Commission, it is essential to explore the political discourse surrounding discipline, optimisation, and securitisation in society and educational policies, which has long been prevalent. As such, the role played by the backward child in society became an increasing concern of the state. Such concern is clearly visible in this 1920 quotation from special education schoolteacher Anna Vilsbæk: "We must do all we can to make the children of the special school useful for society in time."<sup>29</sup>

In a 1919 lecture to the Pedagogical Society, Alfred Lehmann (1858–1921), the founder of the University of Copenhagen's psychology laboratory and Denmark's first professor of psychology, emphasised the critical importance of placing individuals in roles aligned with their abilities, cautioning that misplacement could result in significant societal loss.<sup>30</sup> The idea of utilising testing to allocate human capital efficiently gained traction, particularly in response to the international competition and economic challenges of the interwar years. Danish educational reforms of the 1920s and 1930s were driven by this logic of utility, as evidenced by calls from teachers' unions for experimental schools and laboratories to keep pace with international standards. This competitive ethos was further amplified by critiques from the business sector and public authorities, who argued that children were not being adequately prepared for the labour market.<sup>31</sup>

The Social Democratic Party, which came to power in 1924, embraced these ideas as part of their broader reform agenda. Influenced by British Fabianism and eugenic theories, party leaders like Vilhelm Rasmussen and Karl Kristian Steincke advocated for social engineering to maximise the potential of the working class through education.<sup>32</sup> Testing was viewed as a tool to identify both talented and struggling children, aligning with meritocratic principles and the goal of mobilising the working class.

This mindset was reflected in the expansion of special education, as the issue of "backward" children gained prominence in the 1920s and 1930s. The first special teacher courses began in 1923, funded by the Ministry of Education, and by 1937, a

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28 Proposal for tests used for selection for middle school, Udvalget for Skolepsykologiske Undersøgelser, Protokol for Aarene 1924–1946, folder 5, Foreningen for Experimental Paedagogik I 1913, Historisk-Paedagogisk Studiesamling 2924, Danish National Archive (Rigsarkivet). The test items proposed were fill-in-the-blanks, opposites, analogies, follow-the-rules, logical inference (the Cyril Burt test), and umbrella terms.

29 Cited in Ydesen (2011), 51.

30 Alfred Lehmann, "Enhver paa sin rette plads," *Det Pædagogiske Selskabs Aarsberetninger* (1919), 67–72.

31 Ydesen (2011).

32 Cecilie F. Stokholm Banke, *Den sociale ingeniørkunst i Danmark: familie, stat og politik fra 1900 til 1945* (Roskilde: Roskilde University, 1999).

new Education Act formalised the provision of special classes.<sup>33</sup> Despite initial resistance, the Act received broad political support, indicating a consensus on the value of educational psychology in managing student abilities.

The push for special education was further propelled by a 1936/37 study in Holbæk County, revealing that 6.2% of children had an IQ below 90 – far exceeding expectations (Meyer 1943).<sup>34</sup> This finding led to the establishment of a commission to address the need for special classes and the creation of a formal three-year educational psychologist training program at the University of Copenhagen in 1944.<sup>35</sup>

Publications like the widely proliferated *Vore børn* (“Our Children”) from 1931 and the psychologist Sofus Albin Tordrup’s 1937 work on child psychology illustrate the era’s preoccupation with applying scientific methods to child-rearing and education.<sup>36</sup> These developments positioned IQ testing as a crucial element of the zeitgeist, legitimising the merit-based sorting of students and reinforcing the role of educational psychology in Danish society.

Educational psychology thus became instrumental in identifying and addressing children’s abilities, guiding them into appropriate educational pathways. The 1937 Education Act, while a national milestone, largely codified practices already established at the local level, reflecting the pioneering efforts of a small group of educators and psychologists, including the Danish testing community led by Henning Meyer in the late 1920s.<sup>37</sup>

This section has demonstrated how educational psychology has contributed both to the optimisation of students’ abilities and to the securitisation process that channels students deemed less gifted into special educational settings, such as special classes or specialised schools. Thus, the process of educational sorting operates as a dual mechanism of optimisation and securitisation.

### Post-war case

In his retrospective reflections on the development of educational psychology offices between 1935 and 1960, leading school psychologist Rasmus Jakobsen describes the differentiation of classes and schools for children deemed problematic in relation to the discourse of giftedness.<sup>38</sup> This period saw a significant increase in the number of students referred to the school psychology office, with Jakobsen estimating that approximately 3,000 students were referred each year. This era can also be characterised by the expansion of special education practices aimed at addressing the diverse needs of these students. The optimisation of giftedness was viewed as a process to ensure that no talents were wasted. Notably, from the inception of the school psychology office, collaboration with child psychiatric outpatient clinics was considered essential.

33 E.C. Kaalund-Jørgensen, “Hvad gør vi for de Børn, der ikke kan følge Folkeskolens almindelige Undervisning?” *Hjælpskolan* (1942), 87–95.

34 Henning Meyer, “Betænkningen om særklasser i folkeskolen,” *Vor Ungdom* (1943), 33–38.

35 E. T. Rasmussen, “Redegørelse for det nye psykologisk-pædagogiske studium ved Københavns universitet,” ed. G. Christensen, *Pædagogisk-psykologisk tidsskrift* 4, no. 5–6 (1944), 113–52.

36 Ydesen (2011).

37 Ydesen (2011).

38 Rasmus Jakobsen, “Københavns Kommunes skolepsykologiske kontor 1935–1960,” *Nordisk psykologi: teori, forskning, praksis* 12, no. 6 (1960), 385–90.

Broadly speaking, the post-war period is marked by the consolidation of various new practices in special education and the increasing influence of psy-disciplines within the educational field. These practices emerged through different forms of institutionalisation and were supported by scientific arguments rooted in psychology and psychiatry. They facilitated the development of new discourses around giftedness and non-giftedness, particularly concerning students who did not fit into the optimisation framework and were therefore subjected to what this article terms “technologies of securitization.” Consequently, special education was not confined to so-called special schools or classes but, in an analytical sense, extended to a broader range of institutional discourses and practices within the welfare state. These practices were often characterised by the exclusion of students from mainstream schooling, justified by biological or psychological arguments.

The role and expansion of special education, especially in the Municipality of Copenhagen, is described in the document *Folkeskolen's Special Education – Report Submitted by the Committee Set up by the Ministry of Education, 1955* (in Danish, *Folkeskolens Specialundervisning – Betænkning Afgivet af det af Undervisningsministeriet Nedsatte Udvalg 1955*). The report provides insight into the government's plans concerning special education, particularly highlighting the role of school psychology within the educational system. This role was expanded through initiatives such as training programs, the appointment of consultants, and the establishment of new institutions like observation colonies, all of which extended the psychological scrutiny of children.<sup>39</sup> Psychology emerged as the primary scientific justification for addressing issues related to a child's perceived lack of giftedness and subsequent referral to special education. As part of this psychological expansion, school psychiatry was introduced for further assessment of children deemed problematic within the discourses of optimisation and giftedness. These developments involved interprofessional collaborations between psychologists, psychiatrists, teachers, and health professionals. Such collaborations were crucial in disseminating new psychological and biological insights related to the problematisation of a child's giftedness.<sup>40</sup> These developments and institutionalisations will be further explored below.

In addition to psychology and psychiatry, a third psychological discourse, known as psychotechnics, emerged with the establishment of the Psychotechnical Institute. The mention of this institute in the Ministry of Education's report underscores its significance within the educational system and the broader state apparatus. This institution, rooted in applied psychology, aimed to assess the vocational abilities of young people for the future labour market, particularly targeting those not considered academically gifted, such as students from special schools who might excel in manual or practical skills.<sup>41</sup>

The biological optimisation of students during the post-war period manifested through the scientific discourses of psychology, psychiatry, and psychotechnics, each introducing new technologies that shaped the relationship between students, the schooling system, and the welfare state. These interventions promoted an individu-

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39 Hamre (2025b).

40 Hamre et al. (2019).

41 Hamre (2012b).

al-oriented approach to education, focusing on optimising giftedness and identifying students for special education.

Psychology contributed to the naturalisation of intelligence, viewing it as an inherent quality that varies among individuals. Intelligence testing, despite other understandings like child psychology, reflects a biologism in conceptualising human giftedness. With increased collaboration between schools, teachers, and psychologists, child psychiatry offered diagnostic understandings of children's problems. Although sociological factors like "environmental reaction" were considered, framing these problems diagnostically contributed to their perception as biological issues. The shift in psychiatry from prevention to treatment led to the establishment of child psychiatric clinics. Although eugenic views declined, diagnosis became a key tool in spreading special educational practices, thus securitising the schooling system. Additionally, the Psychotechnical Institute, through testing students' bodies and motor skills, further entrenched biological interpretations of ability and disability, differentiating giftedness and shaping the concept of the ideal student for the welfare state workforce.

The differentiation of giftedness involved emerging collaborations among professionals – teachers, school psychologists, and psychiatrists – who assessed and examined students. Teachers observed students, psychologists conducted IQ testing, and psychiatrists evaluated mental and social conditions. Drawing from British child guidance clinics, these practices were introduced in Danish cities like Copenhagen and Aarhus in the 1930s and 1940s. Key figures like child psychiatrists Karen Margrethe Simonsen (1903–53) and Margrethe Lomholt (1903–1990) emphasised collaboration to understand and treat children's issues.<sup>42</sup> The interpretation of giftedness increasingly incorporated biological, psychological, and sociological discourses, moving beyond mere IQ testing. Simonsen noted that intelligence alone did not determine educational outcomes; other factors like character traits and health were crucial.

It is not intelligence alone that determines what a child gets out of education. It is not uncommon to see that a child with an IQ—let's say 78—is so restless and so devoid of understanding of the concept of work that he gets nothing out of the teaching in the auxiliary school. While, on the other hand, you can experience that a child with an IQ of 66–67 can keep up with the auxiliary school because he is a real hard worker, conscientious and persistent. It is therefore not enough to test a child's intelligence, you must also assess his character traits and his state of health in order to decide in what form the child should be taught, whether it should be in a normal school, an auxiliary school or in the care for the mentally retarded.<sup>43</sup>

Collaboration between school psychologists and psychiatrists became essential as the number of children referred to school psychology offices increased. School psychiatric consultations were established as part of the school system, integrating psychological-pedagogical assistance into addressing children's problems. Simonsen and Lomholt,

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<sup>42</sup> Karen Simonsen, "Børnepsykiatrien i skolen," in *Sindshy-giejnens område og Børnepsykiatrien i skolen*, ed. G. Stürup and K. Simonsen (Copenhagen: Ejnar Munksgaards Forlag, 1943); Margrethe Lomholt, *Børnepsykiatri* (Copenhagen: Rosenkilde og Bagger, 1948).

<sup>43</sup> Simonsen (1943), 38–39.

as pioneering child psychiatrists, influenced the discourse on giftedness and child psychiatry's role in education, emphasising the importance of understanding both biological and psychological factors.

During the 1930s–1960s, there was a dual focus on nurturing individual children's well-being and expanding special educational facilities for students deemed problematic. This expansion included the establishment of observation colonies, which served as quiet havens where children were observed to determine their future placement in the school system.<sup>44</sup> The colonies functioned as a form of special educational practice and played a central role in the securitisation of education, allowing for thorough observation and treatment when outpatient examinations were insufficient.

The Psychotechnical Institute, established in 1929, was significant in the special educational strategy in Copenhagen. Its main task was to conduct psychotechnical examinations of apprentices, office trainees, and civil service applicants. These examinations played a role in public debates on schooling and talent, contributing to the separation of academically and manually gifted individuals. The institute's focus on psychotechnics and psychological examinations was based on applied and experimental psychology, furthering the psychologisation of giftedness and the measurement of talent.

By the late 1950s, governmental concern shifted towards integrating less gifted students into the workforce, as reflected in the Ministry of Education's strategy papers. Psychotechnical tests were recommended for all young people leaving auxiliary schools to assess their suitability for the labour market. This distinction between practical and academic giftedness shaped the construction of personality types deemed important for the Danish welfare state. Although the Psychotechnical Institute closed in 1960, and psychotechnical testing was later problematised, its legacy in shaping societal distinctions in giftedness remained.

Overall, the post-war period saw the expansion of school psychology, psychiatry, and psychotechnics as tools for optimising giftedness and addressing the diverse needs of students, significantly influencing the educational system and the broader welfare state.

Biological optimisation took different forms through scientific discourses such as psychology, psychiatry and psychotechnics, each of which established new technologies in the relationship between the student, the schooling system and the welfare state. We argue that these forms of intervention through the biologisms contributed to establishing an individual-oriented view, as they stressed the importance of optimising giftedness and argued for singling out individual students for special educational purposes or similar institutions.

The different types of discourses, institutions and forms of practice employ, in our understanding, different biologisms. Psychology has, for example, contributed to the naturalisation of intelligence, which everyone possesses to a greater or lesser extent, and despite other parallel understandings such as child psychology, intelligence testing reflects a biologism in the understanding of human giftedness. Psychiatry, increasingly used in collaboration with schools, teachers and psychologists, offers diagnostic understandings of schoolchildren's problems, using sociological framings such as “environ-

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44 Hamre (2025b).

mental reaction”<sup>45</sup> but frames children’s problems as diagnostic issues, contributing to a perception of these problems as biological. Psychiatry has moved from prevention and symptom treatment towards an actual treatment practice through the establishment of child psychiatric clinics at hospitals. Even though eugenicist beliefs decreased in the postwar period, diagnosing was an important tool in special educational practices and, thus, in the securitisation of the schooling system. Finally, the Psychotechnical Institute, through its testing and measurement of students’ bodies and motor skills, used technology and scientification in the interpretation of understandings of ability/disability through biological arguments. Due to the state’s desire for optimisation, giftedness was further differentiated, as was the idea of being an ideal student or useful in the welfare state’s future workforce.

### Contemporary case

In October 2021, the concept of “highly gifted students” was formally integrated into Danish education policy through the “Agreement on the Future Evaluation and Assessment System in Primary Schools.”<sup>46</sup> This policy shift represents a significant change in how gifted students are identified and supported within Denmark’s public education system, marking a notable expansion in the use of IQ testing as a tool for educational practice. Since August 2024, all primary schools have been required to implement screening procedures designed to identify gifted first-grade students. The objective is to develop tailored educational strategies that meet these students’ needs. Consequently, a checklist containing some 21 questions for pedagogical personnel along with a 9-question questionnaire for parents and an 8-question questionnaire for first-grade students have been developed by the Ministry for Education.<sup>47</sup> Together, this material forms the basis of the initial screening. According to the new legislation, a recognised IQ test (e.g. WISC-IV) should be used to determine whether a child is gifted. The act stipulates that:

[...] the screening must be conducted in the 1st or 2nd grade, as early identification of the target group is crucial. [...] It should be noted that in this context, highly gifted students are defined as those with an intelligence quotient above 120. This means that the definition includes both highly gifted students (students with an intelligence quotient above 130) and students with special abilities.<sup>48</sup>

Initially, the 2021 political agreement recommended that 10–15 per cent of first-grade students be referred for IQ testing with the Pedagogical Psychological Counselling (PPR) office. However, in March 2024, the agreement was revised, granting school principals the discretion to determine whether IQ testing should be applied. This

45 Hamre (2023); Bjørn F. Hamre, “Observationskolonier set gennem elevrapporter – interventionspraksis i en skandinavisk velfærdsstat,” in *Nye stemmer i norsk utdanningshistorie. Fra 1800-tallets nasjonalisme til vår tids samtidige utdanningsreformer*, ed. Henrik Edgren and Brit Marie Hovland (Cappelen Damm Akademisk, 2025b), 145–163.

46 Danish Ministry for Children and Education (2021).

47 “Test,” *EMU*, <https://emu.dk/test-og-evalueringsbank/test> (accessed 23 Oct. 25).

48 Remarks to Bill no. L 174, April 27 2022, 11 (our translation), [https://www.folketingstidende.dk/samling/20211/lovforslag/L174/20211\\_L174\\_som\\_fremsat.pdf](https://www.folketingstidende.dk/samling/20211/lovforslag/L174/20211_L174_som_fremsat.pdf). (accessed 23 Oct. 25).

adjustment aims to optimise resource allocation within the PPR and eliminate what was identified as an “unnecessary procedural requirement.”<sup>49</sup>

Despite these significant policy changes, Jakobsen underscores a critical lack of independent research-based evidence supporting the new legislation. Instead, the impetus behind these innovations in Danish public education appears to stem from a confluence of socio-political factors.<sup>50</sup>

Over recent decades, Danish political discourse has increasingly been shaped by what political scientist Ove Kaj Pedersen has termed the “competition state,” a concept that describes Denmark’s transition from a welfare state to one focused on global competitiveness.<sup>51</sup> This concept aligns with the logic of the optimisation dispositive, which aims to optimise the prosperity of the state as well as the talents of the individual. In the realm of education, Imsen et al. observe a discernible shift in values from prioritising the “equality and participatory democracy” characteristic of the welfare state to emphasising “competition and labour market preparedness” (p. 571).<sup>52</sup> This ideological shift underscores the need to harness all available human resources, including the capabilities of highly gifted students, aligning with a vision of Denmark as a knowledge society where education policies are instrumental in enhancing national competitiveness. Although it has been dormant for decades, the historical antecedents of this discourse can be traced to the 1945 youth commission led by Professor Hal Koch, which highlighted the disparity between the intellectual potential of youth and the resultant outcome; 10–20 per cent of the generation had an IQ above 115, but a mere 5 per cent completed higher education.<sup>53</sup>

49 Danish Ministry for Children and Education, “Aftale mellem regeringen (Socialdemokratiet, Venstre og Moderaterne) og Liberal Alliance, Det Konservative Folkeparti, Radikale Venstre og Dansk Folkeparti om folkeskolens kvalitetsprogram – frihed og fordybelse,” March 19, 2024, <https://www.uvm.dk/-/media/filer/uvm/aktuelt/pdf24/mar/240320-aftale-om-folkeskolens-kvalitetsprogram-%E2%80%93-frihed-og-fordybelse.pdf>

50 Thomas Køier Jakobsen, “Folkeskolens rammebetingelser – et policystudie om det styrkede fokus på højt begavede elever og implikationerne af dette for skoleledelsen” (Master’s Thesis, Aalborg University, 2024).

51 Ove Kaj Pedersen, *Konkurrencestaten* (Copenhagen: Hans Reitzels Forlag, 2011). Moreover, as Krejsler highlights in his analysis of OECD policy recommendations, multilateral surveillance mechanisms, understood as “a multitude of state authorities, working together, have agreed to formulate a set of ‘rules of the game,’ best practices and norms for appropriate behaviour” derive rhetorical legitimacy from the fear of falling behind. This reflects a strategic development narrative about world order, asserting that education systems risk losing both national and global competitiveness if they do not optimise human capital – essentially, by producing “employable” or “career-ready” individuals who contribute to the economy; Martin Marcussen, “Multilateral Surveillance and the OECD: Playing the Idea Game,” in *The OECD and European Welfare States*, ed. Klaus Armingeon and Michelle Beyeler (Cheltenham, UK: Edward Elgar Publishing, 2004), 13–31; John Benedicto Krejsler, “How a European ‘Fear of Falling Behind’ Discourse Co-Produces Global Standards: Exploring the Inbound and Outbound Performativity of the Transnational Turn in European Education Policy,” in *The OECD’s Historical Rise in Education: The Formation of a Global Governing Complex*, ed. Christian Ydesen (Cham: Palgrave Macmillan, 2019), 245–67.

52 Gunn Imsen, Ulf Blossing, and Leif Moos, “Reshaping the Nordic Education Model in an Era of Efficiency. Changes in the Comprehensive School Project in Denmark, Norway, and Sweden since the Millennium,” *Scandinavian Journal of Educational Research* 61, no. 5, 568–83. doi:10.1080/00313831.2016.1172502.

53 Alf Hans Sode-Madsen, *Farlig Ungdom: Samfundet, ungdommen og ungdomskommissionen 1945–1970* (Aarhus: Aarhus University Press, 2003); Ydesen (2011).

Another contributing factor can be found in the growing trend of viewing children as “parental projects,” reflecting the increasing individualisation of education.<sup>54</sup> This trend is accompanied by a substantial rise in the diagnosis of various conditions among children, including learning disabilities, ADHD, and autism spectrum disorders, which has added considerable complexity to the educational landscape. The recent increase in parents advocating for their children to be identified as gifted is a manifestation of this trend, further evidenced by the surge in diagnoses of giftedness and the proliferation of private schools specialising in gifted education.

Furthermore, large organisations such as “Gifted Children,”<sup>55</sup> which has over 4,000 members, *Begavet med Glæde*,<sup>56</sup> and the “Gifted Institute”<sup>57</sup> have emerged as key players in the Danish education landscape, providing support and resources for highly gifted children and their families. These organisations also serve as advocacy groups and policy brokers, striving for enhanced recognition and resources for gifted students.<sup>58</sup> Finally, pedagogical and parental concern for student well-being and the need to provide appropriate educational opportunities for all students remain central to the discourse on gifted education.

These developments elucidate the growing awareness and recognition of the unique needs and potential of highly gifted children in Danish society. The shift is also nourished by an acknowledgement that gifted children have historically been overlooked and seeks to address this gap through targeted educational policies and support structures.

The historical case analyses presented earlier in this article highlight a significant contrast with the contemporary application of IQ tests, which now extend to a broader student population and serve new purposes. Despite this evolution, the testing regime remains deeply embedded in bell-curve thinking. However, the focus of the optimisation framework, which operates at both societal and pedagogical levels, has shifted to the opposite end of the bell curve – specifically, towards gifted students. The renewed emphasis on IQ testing becomes particularly noteworthy when considering the writings of Kaj Aage Spelling (1915–1994), a former educational psychologist and professor at the Royal Danish School of Education. Spelling later expressed profound regret over his earlier involvement with IQ testing, underscoring the complexities and ethical considerations surrounding its use:

The worst aberration of intelligence research and theories was the IQ [test]. I admit that I have calculated thousands of IQs in the past, but today, I regret every single one of them if they were used for the evaluation of a child . . . The IQ [test] was a dangerous weed in the garden of pedagogical psychology.<sup>59</sup>

54 Annette Lareau, *Unequal Childhoods: Class, Race, and Family Life* (Berkeley: University of California Press, 2012), <https://doi.org/10.1525/9780520949904>; Katherine S. Newman, *The Accordion Family: Boomerang Kids, Anxious Parents, and the Private Toll of Global Competition* (Boston: Beacon Press, 2012).

55 <https://giftedchildren.dk>. (accessed 23 Oct. 25).

56 <https://begavetmedglaede.dk>. (accessed 23 Oct. 25).

57 <https://gifted-institute.com/da/>. (accessed 23 Oct. 25).

58 Jakobsen (2024).

59 Kaj Spelling, “Intelligensbegrebet under lup,” *Psykologisk Pædagogisk Rådgivning* 4 (1992), 256–71.

Spelling's anguished reflection epitomises the disillusionment within the educational community and the intense criticism directed at various forms of educational testing, particularly IQ testing, in Denmark from the late 1960s through the 1990s.<sup>60</sup> While earlier sections have detailed the societal and sociological developments driving the shift towards IQ testing for giftedness, it is also important to note that organisational changes in the 1990s played a role. Market-oriented policies, such as free school choice and "taximeter regulation" (where school funding follows the individual student), facilitated the structural individualisation of education.<sup>61</sup>

Another significant factor contributing to the current challenges in Danish education is the stalled progress of inclusive education. Initially, the concept gained prominence with a 2012 law aimed at reducing the segregation of students with special needs.<sup>62</sup> This law established an ambitious inclusion target, mandating that 96 per cent of all students should be integrated into the ordinary *Folkeskole*. This goal was integral to broader school reforms that positioned inclusive education as a central objective. Consequently, Danish public schools were tasked with creating more inclusive learning environments to accommodate students with special needs within mainstream classrooms. However, this shift led to significant reductions in special education services, which, while reducing costs for local education authorities, did not lead to the provision of additional resources for mainstream education to support the new demands of inclusive education.<sup>63</sup> This has made inclusive education unpopular among some parents of mainstream education pupils, as evidenced in numerous debates on social media.

Although the 96 per cent inclusion target was officially abandoned in 2016, inclusive education in Denmark is now widely regarded as a failure.<sup>64</sup> Since the reform, the number of students labelled as having "special needs" has continued to rise, reversing progress and causing a return to pre-reform levels of special provision. This regression has placed increased financial strain on many public schools. As Rasmus Edelberg, chairperson of the Danish national interest organisation *Skole og Forældre* (School and Parents), observes:

60 Bendixen (2006). It is significant that the Danish national broadcasting corporation, Danmarks Radio, aired at least four critical documentaries on intelligence testing around 1970. These documentaries included *Sviger Samfundet Problembørnene?* (Are Problem Children Let Down by Society?), broadcast on November 26, 1969; *Kontakt* (Contact), broadcast on October 19, 1970; *Når Intelligens Bli'r et Problem* (When Intelligence Becomes a Problem), broadcast on March 23, 1971; and *Den Meningsløse Intelligens* (The Meaningless Intelligence), broadcast on October 25 and again on November 2, 1971. Notably, prior to this period, no documentaries on this subject had been aired in Denmark. Ydesen (2011).

61 Christian Ydesen, "Globalization and Localization in the Shaping of the Danish Public Education System – Discursive Struggles in Four Historical Educational Reforms," in *Globalization and Localization: A Euro-Asia Dialogue on 21<sup>st</sup>-Century Competency-Based Curriculum Reforms*, ed. W. Zhao and D. Tröhler (Cham: Springer International Publishing, 2021), 85–109, [https://doi.org/10.1007/978-981-16-3009-5\\_5](https://doi.org/10.1007/978-981-16-3009-5_5).

62 Hamre (2018).

63 Thomas Engsig and Christopher Johnstone, "Is There Something Rotten in the State of Denmark? The Paradoxical Policies of Inclusive Education – Lessons from Denmark," *International Journal of Inclusive Education* 19, no. 5 (2015), 469–86.

64 Mathilde Weirsøe, "Inklusionen er dumpet – så hvad nu?" *Asterisk*, November, 2021, <https://dpu.au.dk/asterisk/asterisk-99/inklusionen-er-dumpet-saa-hvad-nu>.

When the budget is exceeded in special education, which 75 municipalities have experienced, the additional spending in approximately half of the municipalities is typically covered through cutbacks in the school's own budget. This means that a lack of funding affects all children and makes it very difficult for schools to undertake preventive efforts that could reduce segregation and strengthen broader communities in mainstream environments.<sup>65</sup>

These developments have tarnished the reputation of inclusive education and fuelled a growing demand for individualised educational solutions. The recent focus on gifted education reflects this trend. It is also a manifestation of the reinvoication of the optimisation dispositive, which emphasises seemingly objective biological traits as determinants of identity and educational provision. The environment fostering this dispositive now benefits from social media, where like-minded individuals can easily congregate in echo chambers, reinforcing their views and perceptions. The giftedness community has a strong presence on social media, supported by advocacy organisations, certain politicians, and individuals associated with Mensa,<sup>66</sup> whose identities are closely tied to their IQ test scores. This community, often from the upper middle class, represents a resourceful segment of society, and their push for gifted education resonates with Tomlinson's observation about the persistent hierarchy and differentiation within education systems based on wealth and status.

The *Folkeskole*, as a core pillar of the universal Danish welfare state model, is now facing challenges that threaten its foundational principles and the social cohesion of society. In this context, the new emphasis on giftedness can be seen as an expression of both securitisation and discipline in new forms – aimed at maintaining social cohesion and maximising human resources for competitive purposes while also ensuring the survival of the *Folkeskole* as it navigates an increasingly individualised and fragmented educational landscape. In essence, this new approach represents the government's and the *Folkeskole*'s efforts to adapt to changing realities while retaining influence over the students shaped by Denmark's educational system.

### Concluding discussion

The shifting and reconfiguring biologistic ability paradigm in education, particularly within welfare state development, has played a pivotal role in shaping policies and practices related to giftedness, special education, and the broader conceptualisation of human capital optimisation. Across different historical periods, from the interwar era to contemporary times, the intersection of scientific knowledge, politics, and societal needs has continuously influenced how education systems address the public good. This concluding discussion synthesises key insights from three diachronic empirical analyses, exploring how biologistic frameworks have manifested and evolved while simultaneously impacting ideas of the public good within the context of welfare state development.

65 "Ny evaluering af inklusion: Investeringer er afgørende," *Skole og Forældre*, March 29, 2022. <https://www.skole-foraeldre.dk/nyheder/ny-evaluering-af-inklusion-investeringer-er-afgørende>.

66 <https://mensa.dk>. (accessed 23 Oct. 25).

In the interwar period, Denmark witnessed the formalisation of educational psychology as a profession through the establishment of the Educational Psychology Study Commission in 1924. This commission, composed of prominent educational figures and backed by significant political support, was responsible for introducing IQ testing as a tool for optimising the allocation of human capital. IQ testing, particularly the Binet-Simon intelligence test, became a means of sorting students into different educational pathways, laying the foundation for both special education and vocational training.

The biologicistic underpinnings of this era's educational reforms reflect a broader societal preoccupation in which discipline, optimisation, and securitisation affected the perception of giftedness in the welfare state. Danish authorities, influenced by eugenic theories and international competition, emphasised the need to place individuals in roles suited to their abilities, lest societal resources be wasted. Educational psychology played a critical role in identifying "backward" children, who were subsequently funnelled into special education programs. This process of sorting students was justified by biologicistic assumptions about intelligence, which were seen as innate qualities that could be measured and categorised, securing the right placement of the students as future citizens.

The commission's work, bolstered by political figures like MP Vilhelm Rasmussen, highlights the strong connection between educational psychology and the emerging welfare state. The focus on standardising intelligence and vocational tests served a dual purpose: optimising the talents of the working class and ensuring that those who were less academically inclined could still contribute productively to society. In this context, the public good was defined in terms of maximising the efficiency and productivity of human capital while also realising pedagogical ideals about providing the right education provision for all students.

In the post-war era, the Danish education system experienced significant growth in the provision of special education, facilitated by the expanding influence of psychology and psychiatry. Leading school psychologists like Rasmus Jakobsen documented the increasing number of students referred to special education, with approximately 3,000 being assessed annually. This period marked the consolidation of various new practices, including the establishment of observation colonies and increased collaboration between school psychologists, child psychiatrists and the schooling system in general. These collaborations enforced the differentiation of students, securing the best possible optimisation of the individual and society.

The post-war era saw a continuation of biologicistic thinking but with a notable shift in focus. While earlier efforts were geared towards addressing students who fell behind, the post-war period introduced the notion of optimising giftedness. This shift reflects the changing priorities of the welfare state, which now sought to ensure that no talent was wasted. The introduction of psychiatric assessments and the establishment of child psychiatric clinics further entrenched the biologicistic framework, positioning children's mental and emotional problems as diagnostic issues that could be treated and managed through scientific intervention. Through the introduction of child and school psychiatry, the ability paradigm had been extended so that mental health increasingly became part of the normalisation and securitisation technologies. Diagnostic assessments gave new ways to interpret what it meant to be able and to be disabled from the perspective

of the schooling system. Psychiatric professionals extended the assessments introduced by educational psychology, as seen in the interwar case.

Importantly, the discourses surrounding giftedness and non-giftedness were framed within the broader optimisation dispositive, which operated at both societal and pedagogical levels. Special education was no longer confined to remedial classes but became an integral part of the welfare state's strategy to manage and optimise student abilities; thus, special education was not limited to a certain discourse or terminology but became an integral part of organising differentiation in the schooling system. The psychotechnical institute's focus on measuring motor skills and work potential also contributed to the broader goal of preparing students for their future roles in the workforce, reinforcing the notion that education should serve both individual and societal interests. The emergence and founding of special education, educational psychology and psychotechnical institutes demonstrate how the interplay between dispositives of optimisation and securitisation was legitimised through biologisms and psy-disciplines.

In recent decades, Danish education policy has undergone significant changes, most notably with the formal integration of the concept of "highly gifted students" into public education through the "Agreement on the Future Evaluation and Assessment System in Primary Schools" in 2021. This shift represents a resurgence of IQ testing, now focused on identifying and supporting gifted students from an early age. The new legislation mandates that all primary schools screen first-grade students for giftedness using a recognised IQ test, employing a specific threshold of 120 IQ points or above.

This renewed emphasis on giftedness can be understood as part of a broader socio-political shift toward the "competition state," a concept that reflects Denmark's transition from a welfare state focused on equality towards one that prioritises global competitiveness and the optimisation of the individual. In this new paradigm, education is increasingly seen as a tool for harnessing human capital to enhance national economic performance. As such, the identification and nurturing of gifted students align with the state's interest in optimising the talents of its citizens for the benefit of the collective. Politics of inclusion, in this perspective, plays the function of getting everybody on board with the securitisation technologies of the competition state.<sup>67</sup>

The rise of parental advocacy groups and private schools specialising in gifted education further highlights the individualisation of education in contemporary Denmark. This trend reflects the growing view of children as "parental projects" and underscores the increasing importance of diagnosing and categorising children based on perceived biological traits. The surge in diagnoses of learning disabilities, ADHD, and autism spectrum disorders adds complexity to the educational landscape, raising questions about how to balance individual needs with the public good. This hints at how diagnostic technologies legitimised through psy-disciplines contribute to the optimisation of the individual and the individualisation of giftedness.

Throughout the interwar, post-war, and contemporary periods, the biologistic ability paradigm has played a central role in shaping educational policies and practices in Denmark. In this diachronic analysis, we have seen how different key actors have shaped the biologistic ability paradigm. In the interwar period, the educational

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<sup>67</sup> Hamre (2018).

psychologist played the most important role in student testing. In the postwar case, child- and school psychiatrists increasingly impacted the examination and diagnosis of children. In the contemporary case, diagnosing and neuroscience seem to gain influence in the ability paradigm. The concept of optimisation, whether applied to the less gifted or the highly gifted, reflects a broader societal goal of maximising human capital for the collective benefit. This paradigm has manifested in various forms, from IQ testing and vocational assessments in the early twentieth century to the contemporary focus on identifying and nurturing giftedness.

At the same time, the shifting focus within this biologicistic framework – from managing the “backward” child to optimising the highly gifted – illustrates how ideas about the public good have evolved in response to changing societal needs, increasingly enforced through technologies of securitisation. In the interwar and post-war periods, the welfare state prioritised social cohesion and the efficient allocation of human resources, often through the lens of scientific testing and classification. In the contemporary era, the public good is increasingly defined by the state’s need to remain competitive on a global scale, with education serving as a means to cultivate the talents of individuals who can contribute to that goal.

In conclusion, the shifting and reconfiguring biologicistic ability paradigm has not only influenced how education systems sort and optimise students but has also shaped broader ideas about the public good within the context of welfare state development. As the welfare state continues to evolve, so too does the role of education in balancing individual needs with collective societal interests. Whether through IQ testing, special education, psychiatric diagnosing or the identification of gifted students, the interplay between biological knowledge and the public good remains a central concern in shaping the future of education.

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## Truancy, School Phobia, or School Fatigue? Understandings of Students' Absenteeism, 1945–1975

Thom Axelsson & Anna Larsson

*Abstract* • Although school absenteeism is often described as a growing problem, it has long posed challenges for educators. This article explores how unwanted school absenteeism was problematised in Sweden between 1945 and 1975. Drawing on archived student records from the school health service concerning students with perceived problematic absenteeism, and published texts by experts such as psychiatrists, psychologists, and teachers, the study examines how the issue was defined, what explanations were offered, what interventions were proposed, and which experts were involved. The analysis uses the concept of *psychoculture*, referring to ways of thinking shaped by psychology, psychiatry, and psychoanalysis. The article shows how interpretations of absenteeism were historically contingent, influenced by institutional structures, professional agendas, and available methods of interventions.

*Keywords* • Unwanted school absenteeism; school health services; Sweden, psychoculture

In Sweden today, school absenteeism is reported as a growing concern, both in media reports and in investigations conducted by public authorities.<sup>1</sup> Children who do not attend school are sometimes referred to as “home-sitters” (*hemmasittare*), but the term “problematic school absenteeism” is often proposed as an umbrella concept encompassing all forms of absenteeism. Research has shown that the reasons for students’ non-attendance vary widely: a child may struggle to keep up with the curriculum, experience conflicts with teachers, be subjected to bullying, or feel different and excluded.<sup>2</sup> Ongoing discussions seek to uncover the underlying causes of problematic school absenteeism, with some questioning what has changed in schools when a significant proportion of students are unable to attend.<sup>3</sup>

However, the issue of unwanted school absenteeism is not new. Throughout the history of education, there have always been students who, for various reasons, have been unable or unwilling to participate in the compulsory education offered by schools.

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1 Skolinspektionen, *Omfattande ogiltig frånvaro i Sveriges grundskolor* (Stockholm: Skolinspektionen, 2016); Skolverket, *Nationell kartläggning av elevfrånvaro: De obligatoriska skolformerna samt gymnasie- och gymnasiesärskolan* (Stockholm: Skolverket, 2021).

2 Tobias Forsell, “Man är ju typ elev, fast på avstånd.” *Problematisk skolfrånvaro ur elevers, föräldrars och skolpersonals perspektiv* (Umeå: Umeå University, 2020); Hans Ek, *Psykiatriseringen av skolkaren: BUP och det institutionella omhändertagandet av ungdomar som inte går till skolan* (Umeå: Umeå University, 2018).

3 See e.g. Moa Haltorp, “Vad är egentligen problematisk skolfrånvaro?” *Dagens Nyheter*, August 13, 2024.

This has traditionally been a matter for teachers and school authorities to address. As early as 1846, Oscar Elis Leonard Dahm described in his work *Skolmästarkonst* (The Art of the Schoolmaster), the problem of school neglect – “truancy and the like” – as a matter of concern. Dahm emphasised that the fault “often actually lies with the parents,” who did not always ensure their children attended school.<sup>4</sup> Reasons such as necessary household chores, a relative’s illness, or lack of proper clothing were considered legitimate grounds for absence. However, unwarranted absences were to be counteracted. Measures available to teachers included detention, remarks in conduct grades, demotion, or corporal punishment (preferably administered by parents to avoid increasing the child’s reluctance to attend school).<sup>5</sup> Parental failure to send children to school was also viewed as a major issue by authorities during the early decades of compulsory education, even though at that time, compulsory schooling referred to the municipality’s obligation to provide education, rather than the child’s obligation to attend.<sup>6</sup> Even in grammar schools and similar institutions for children from higher social classes, dating back to the seventeenth century, absenteeism was seen as problematic, particularly when students roamed the streets in groups, causing disturbances instead of being in school.<sup>7</sup> Although the issue of unwanted school absenteeism has long existed, perspectives on its nature, causes, and appropriate responses have changed over time.

The aim of this article is to show how students’ unwanted school absenteeism was understood and interpreted during the period 1945–1975. As will be demonstrated, this was a time when school absenteeism began to be taken seriously as a problem, the school health service became involved, and scientific explanations were developed. Drawing on two types of empirical material – archived student records from the school health service concerning students with perceived problematic absenteeism, and published texts by experts such as psychiatrists, psychologists, and teachers – we analyse how perspectives on children’s unwanted school absenteeism developed and changed over time. We address the following research questions:

1. What terms and definitions were used to describe the problem?
2. What explanations were offered for unwanted school absenteeism, and what measures were proposed?
3. Which experts were involved?

These questions are analysed in relation to the concept of psychoculture, which refers to ways of thinking shaped by the language and ideas of psychology, psychiatry, and psychoanalysis.<sup>8</sup> In doing so, the article highlights how the problem of school absen-

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4 Oscar Elis Leonard Dahm, *Skolmästarkonst: Antydningar för lärare och skolinspektörer* [1846], reprinted in *Minnen och dokument 8. Årsböcker i svensk undervisningshistoria* 76 (Uppsala: Föreningen för svensk undervisningshistoria, 1995), 134.

5 Dahm ([1846] 1995), 163–65.

6 Gunnar Richardson, “Folkskolan tar form – de första decennierna,” in *Ett folk börjar skolan: Folkskolan 150 år 1842–1992*, ed. Gunnar Richardson (Stockholm: Allmänna förlaget, 1992).

7 Björn Norlin, *Skolagens historia och pedagogik: Sedlighetsfostran, disciplinering och våldsbruk i den tidigmoderna skolan, 1560–1820* (Lund: Nordic Academic Press, 2021).

8 Petteri Pietikäinen, *Neurosis and Modernity: The Age of Nervousness in Sweden* (Leiden: Brill, 2007).

teeism is historically contingent and shaped by institutional arrangements, prevailing norms, and available interventions.

### Previous research

Historical research has not specifically focused on unwanted school absenteeism during the period in question, but several areas touch upon the issue directly or indirectly. One major field of research concerns the development of society's responsibility for children. In Sweden, the state took during the early twentieth century increasing responsibility through child welfare boards and legislation, allowing children to be taken into care when families were deemed inadequate.<sup>9</sup> Over time, the care system became more differentiated, with schools playing a central role.<sup>10</sup> In the 1930s, inspired by the Anglo-Saxon mental hygiene movement and child guidance clinics, special counselling agencies for child-related problems were established. Schools or parents could refer children to these agencies for investigation or support. Reasons for referral included, for example, "truancy," "running around outdoors," and "vagrancy."<sup>11</sup>

The development of child psychiatry in Sweden has also been explored in research.<sup>12</sup> During the first decades of the twentieth century, child psychiatry primarily targeted pupils who struggled to adapt to school or had come into contact with the judicial system. As a result, the field became closely associated with the social problems of the time.<sup>13</sup> Effective treatment methods were largely lacking. As in other countries, the first step toward state-funded child psychiatry came in the 1940s with the establishment of child psychiatric clinics at hospitals.<sup>14</sup> However, scholars have noted that the Scandi-

9 Maria Sundkvist, *De vanartade barnen: Mötet mellan barn och föräldrar och Norrköpings barnavårdsnämnd 1903–1925* (Uppsala: Hjelm, 1994); Thom Axelsson, "De svåruppfostrade barnen; Skolpsykiatrins framväxt och etablering i Sverige 1910–1955," *Scandia* 87, no. 2 (2020).

10 Cf. Roger Qvarsell, "Ungdomars brottslighet och samhällets vård," in *Vård av ungdomar med sociala problem: En forskningsöversikt*, ed. Bengt-Åke Armelius (Stockholm: Liber, 1996), 36.

11 Ulf Jönson, *Bråkiga, lösaktiga och nagelbitande barn: Om barn och barns problem vid en rådgivningsbyrå i Stockholm 1933–1950* (Linköping: Linköping University, 1997), see e.g. 224; John Stewart, *Child Guidance in Britain, 1918–1955: The Dangerous Age of Childhood* (London: Taylor & Francis, 2016); Margo Horn, *Before It's Too Late: The Child Guidance Movement in the United States, 1922–1945* (Philadelphia: Temple University Press, 1989).

12 Margareta Brandell-Forsberg, *Barnpsykiatri i tiden: Den värmländska barn- och ungdomspsykiatrins historia* (Karlstad: Landstinget i Värmland, 1996). Karl-Henric Karlén, *Barn- och ungdomspsykiatri i Sverige: Dess historia, problem och patienter* (Uppsala: Uppsala University, 1985).

13 Roger Qvarsell, "Från vanart till psykopati: Om barnpsykiatrins framväxt i Sverige under mellankrigstiden," *Lychnos* (1985), 167–88; Karin Zetterqvist Nelson, "A Reason Behind Every Action': The Early Years of Swedish Child Psychiatry, 1930–1945," *Revue d'histoire de l'enfance "irrégulière"* 18, no. 1 (2016).

14 Karin Zetterqvist Nelson, "Från samhällets barn till egna individer: Barnpsykiatrisk behandlingsideologi 1945–1985," *Scandia* 78, no. 2 (2012); see also e.g. Nelleke Bakker and Milou Smit, "An Oedipal Conflict on an Epileptic Basis: The Diagnosing and Treatment of Behavioural Problems in a Dutch Child Psychiatric Clinic (1952–1962)," *Paedagogica Historica* 56, no. 3 (2020); Helmut Remschmidt and Herman Van Engeland, eds., *Child and Adolescent Psychiatry in Europe: Historical Development, Current Situation, Future Perspectives* (Darmstadt: Steinkopff Verlag, 1999).

navian model was characterised by a strong emphasis on preventive social work and a high degree of trust in expert authority.<sup>15</sup>

Another significant area of research concerns the expansion of compulsory schooling in response to urbanisation and demographic changes during the twentieth century.<sup>16</sup> As more children attended school for longer periods, various types of special classes were introduced, particularly in larger cities. These included remedial classes (for students with intellectual disabilities), reading classes (for those with reading and writing difficulties), school maturity classes (for students deemed not yet ready for regular instruction) and observation classes (more or less temporary placement for students with “mental special characteristics,” often used when professionals found assessment difficult).<sup>17</sup> The practice of assigning students to the most appropriate class type drove the expansion of testing from the 1920s onwards.<sup>18</sup> This, in turn, created a demand for teachers with special education training, as well as for professionals capable of determining appropriate student placements.<sup>19</sup>

Although the division of responsibilities between schools, clinics, and advisory bureaux varied, schools gradually assumed increasing responsibility for children’s mental health and emotional well-being. As in many other countries, the focus of school health services shifted toward mental health as poverty-related issues such as infectious diseases and malnutrition declined.<sup>20</sup> This shift increased the importance of psychiatric expertise. Per-Anders Rydelius has described a form of “school psychiatry” that flourished between 1920 and 1970. However, ideologically rooted in eugenics, racial biology, and brain injury research, this approach came to be seen in the 1960s as

15 Åsa Lundqvist and Klaus Petersen, eds., *In Experts We Trust: Knowledge, Politics and Bureaucracy in Nordic Welfare States* (Odense: University Press of Southern Denmark, 2010); Björn Hamre, Thom Axelsson and Kari Ludvigsen, “Psychiatry in the Sorting of Schoolchildren in Scandinavia 1920–1950: IQ Testing, Child Guidance Clinics and Hospitalization,” *Paedagogica Historica* 55, no. 3 (2019), 391–415.

16 See e.g. Henrik Edgren, “Folkskolan och grundskolan,” in *Utbildningshistoria: En introduktion*, ed. Esbjörn Larsson and Johannes Westberg (Lund: Studentlitteratur, 2024).

17 *Undervisningsplan för rikets folkskolor* (Stockholm: Skolöverstyrelsen, 1955), 231–64. See also Karl-Gustaf Stukát and Ulla-Britt Bladini, *Svensk specialundervisning: Intentioner och realiteter i ett utvecklingsperspektiv* (Göteborg: Göteborg University, 1986).

18 Thom Axelsson, *Rätt elev i rätt klass: Skola, begåvning och styrning 1910–1950* (Linköping: Linköping University, 2007); Karin Zetterqvist Nelson and Bengt Sandin, “The Politics of Reading and Writing Problems: Changing Definitions in Swedish Schooling During the Twentieth Century,” *History of Education* 34, no. 2 (2005).

19 Ulla-Britt Bladini, *Från hjälpskolelärare till förändringsagent: Svensk speciallärarutbildning 1921–1981 relaterad till specialundervisningens utveckling och förändringar i speciallärarens arbetsuppgifter* (Göteborg: Göteborg University, 1990); Christian Lundahl, “Making Testers out of Teachers: The Work of a Swedish State Research Institute 1946–1956,” *History of Education* 48, no. 5 (2019); Christian Ydesen, Kari Ludvigsen and Christian Lundahl, “Creating an Educational Testing Profession in Norway, Sweden, and Denmark, 1910–1960,” *European Educational Research Journal* 12, no. 1 (2013).

20 Astri Andresen, “Skolbarn, hälsopolitik och försöken att ändra på framtiden,” in *Barnen och välfärdspolitiken: Nordiska barndomar 1900–2000*, ed. Astri Andresen et al. (Stockholm: Dialogos förlag, 2011); Cathy Urwin and Elaine Sharland, “From Bodies to Minds in Childcare Literature: Advice to Parents in Inter-war Britain,” in *In the Name of the Child: Health and Welfare 1880–1940*, ed. Roger Cooter (London and New York: Routledge, 1992); Anna Larsson, “Physical, Emotional, and Social Illness: Changing Problems for School Health Care in Twentieth Century Sweden,” *History of Education Review* 46, no. 2 (2017).

stigmatising and segregating, and it was largely abandoned in the 1970s.<sup>21</sup> At the same time, the media began to play a more prominent role in shaping public perceptions of mental health. As Peter Skagius and Karin Zetterqvist Nelson have noted, these “popularised” portrayals were often alarmist in tone.<sup>22</sup>

Alongside these changes, a new psychosocial field of expertise was established within schools, with positions for psychologists and counsellors/social workers (*skolkuratorer*).<sup>23</sup> From the 1940s, school psychologists and their assistants primarily focused on testing and assessment, but over time their roles expanded to include addressing students' psychosocial problems. Similarly, the responsibilities of school social workers evolved, from facilitating students' access to societal support and services, to providing psychosocial counselling.<sup>24</sup> This shift reflects a broader discursive transformation in how school-related problems were conceptualised: from a medically oriented framework, through an individual psychological lens, to a more socially oriented discourse.<sup>25</sup> Although similar developments can be observed internationally, it is important, as research has emphasised, to examine specific national contexts to understand the unique cultures and practices that have emerged.<sup>26</sup>

Previous research thus points to a growing professional differentiation within the field of school health care and an increasingly clear division between schools and the healthcare system during the period under investigation. By focusing on unwanted absenteeism during this period of transformation, the present study will complement existing research and contribute to a deeper understanding of the development of school health care in Sweden.

21 Per-Anders Rydelius, “Svensk barn- och ungdomspsykiatri 50 år och om hur kunskapsområdet utvecklades till ett vetenskapligt ämne,” stencil 2012.

22 Peter Skagius and Karin Zetterqvist Nelson, “Den konstanta oron: Barn och ungas psykiska ohälsa i svensk dagspress,” *Scandia* 87, no. 2 (2020).

23 Kari Ludvigsen, “The ‘Psy-experts’ and the Minds of Children: Transfer of Knowledge in Inter-war Norway and Sweden,” in *In Experts We Trust: Knowledge, Politics and Bureaucracy in Nordic Welfare States*, ed. Åsa Lundqvist and Klaus Petersen (Odense: University Press of Southern Denmark, 2010); Larsson (2017); Anna Larsson, “School Psychologists as Experts: Some Notes on the Uses of Behavioral Science in Post-War Sweden,” in *Social Science in Context: Historical, Sociological and Global Perspectives*, ed. Rickard Danell, Anna Larsson, and Per Wisselgren (Lund: Nordic Academic Press, 2013).

24 Karin Zetterqvist Nelson and Bengt Sandin, “Psychodynamics in Child Psychiatry in Sweden, 1945–85: From Political Vision to Treatment Ideology,” *History of Psychiatry* 24, no. 3 (2013).

25 Eva Hjörne and Roger Säljö, *Att platsa i en skola för alla: Elevhälsa och förhandling om normalitet i den svenska skolan* (Stockholm: Norstedts, 2008), 53; Mats Börjesson and Eva Palmblad, *I problem-barnens tid: Förnuftets moraliska ordning* (Stockholm: Carlssons, 2003).

26 See e.g. Annette Mühlberger, “The Need for Contextual Approaches to the History of Mental Testing,” *History of Psychology* 17, no. 3 (2014); Inbar Graiver, “A Historical Perspective on Mental Health: Proposal for a Dialogue Between History and Psychology,” *History of Psychology* 24, no. 1 (2021); Anne Koskela and Kaisa Vehkalahti, “Child in a Form: The Definition of Normality and Production of Expertise in Teacher Statement Forms – the Case of Northern Finland, 1951–1990,” *Paedagogica Historica* 53, no. 4 (2016).

## Materials, methods, and theory

The material used for this study comprises two types, both consisting of documents written by experts within the psychological field.<sup>27</sup> The first type includes handbooks, scientific reports, and articles from professional journals focusing on children, schools, psychology, and psychiatry. Identifying relevant texts on school absenteeism is not straightforward, as terminology has shifted over time. Therefore, the search was conducted broadly, with an awareness that any selection risks overemphasising certain aspects while overlooking others. For this article, we searched using terms historically associated with unauthorised school absence: truancy (*skolk*), school boredom or school fatigue (*skoltrötthet/skolleda*), school anxiety (*skolskräck/skolfobi*) and absenteeism (*frånvaro*). Our focus is on texts where absenteeism was the primary concern why more general terms such as misconduct, asociality, or school problems were excluded as search terms. The term home-sitter, now common in Swedish media, was not used during the period under study.

The second type of material consists of student records from school health services, archived in the school archives at Malmö City Archives (MSA), the Regional Archive in Gothenburg (RAG), and the Stockholm City Archives (SSA). These records were produced within institutional settings by professionals in their official capacities and concern children perceived as problematic for various reasons. Files may include information from multiple institutions. The organisation of records varies slightly between the archives but is generally by year of birth and sometimes by gender. Early records are relatively brief, while later ones are significantly more detailed – up to five times longer. Due to the volume of the material, a random selection was made by selecting one in every ten volumes. Within these, cases were chosen where absenteeism was described as a central or partial issue. Same search terms were used, including truancy, school boredom, school fatigue, school anxiety and absenteeism.

This study does not aim to quantify the prevalence of absenteeism. Rather, it explores the discursive practices through which absenteeism was understood and managed. The focus lies on the descriptions, arguments, and classifications found in the records, and how these evolved over time. By analysing how school staff, authorities, and psychiatric professionals described and categorised absent pupils, the study highlights the norms and disciplinary practices underpinning institutional responses to absenteeism.

The records are subject to strict confidentiality. A coding system has been used to anonymise all individuals. The records contain names or refer to individuals as “the girl” or “the boy,” particularly in teachers’ notes, while medical professionals more often use the term “patient.” No real names of individuals, schools, hospitals, and neighbourhoods are disclosed. Terms used in the original documents are reproduced in direct quotations, including diagnoses, which are often specific to the historical context and difficult to translate. For professionals mentioned in the material, only their roles and titles are cited, not personal names except in the case of authors of published articles from the period.

The time frame for this article is limited to the years 1945–1975. The starting point is motivated by the growing attention to problematic school absenteeism in the 1940s,

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<sup>27</sup> This research project has been approved by the Swedish Ethical Review Authority, Dnr 2023-00138-01.

coinciding with debates on comprehensive schooling. During this time, psychosocial issues became part of the school health service's remit, child psychiatry gained institutionalised footing, and scientific interest in absenteeism emerged. The endpoint after the expansion of compulsory schooling to nine years is marked by the publication of the SIA inquiry, which led to major reforms in school health services, including new state funding, support resources, and the introduction of the action programme, a concept that would later become central. Our study concludes before these changes were implemented.<sup>28</sup> The chosen timeframe captures the establishment of psychosocial professions such as school social workers, psychologists, and, in some cases, psychiatrists within schools. This complemented the existing medical services provided by school doctors and nurses, introducing a distinct psychosocial dimension.

During this period of expansion, discourse on school absenteeism reflected a broader psychological worldview, what historian Petter Pietikäinen terms a “psychoculture.” Emerging in Sweden in the 1920s–1930s, psychoculture replaced earlier “neurocultural” models focusing on nerves and nervousness with psychological and psychodynamic models for understanding behaviour and well-being. Psychological language became normalised, shaping how both professionals and laypeople interpreted human experience, including that of children.<sup>29</sup> As a theoretical starting point for this study, psychoculture refers to a mode of thinking shaped by the language and ideas of psychology, psychiatry, and psychoanalysis. This aligns with Nikolas Rose's discussion of a “psy-complex,” where the influence of “the psy disciplines” is fundamental.<sup>30</sup> This framework points to how psychological discourse permeates institutions like schools. Psychoculture also carries normative assumptions, influenced by broader social factors such as class, gender, and ethnicity. However, psychoculture was neither uniform nor static. This article critically examines how different professional groups interpreted and responded to school absenteeism, revealing both continuity and change over time. Shifts in discourse and practice are evident within the psychoculture and will be explored.

This theoretical approach reflects the study's fundamental social constructionist perspective. School problems are socially constructed emerging within specific organisational, ideological and historical contexts. What is seen as problematic or trivial is shaped by prevailing norms and values, and by the actors involved. Interpretations of causes and interventions, whether medical, psychological, or educational, must be understood within their historical frameworks. Recognising this does not diminish the real impact of problems but rather situates them in context.<sup>31</sup>

In line with this, “unwanted school absenteeism” must be historicised. It depends on which children were expected to attend school. The 1842 elementary school act introduced compulsory schooling in the sense that parishes had to provide schools, but not all children were required to attend. Over time, attendance obligations were

28 SOU 1974:53, *Skolans arbetsmiljö: Betänkande av Utredningen om skolans inre arbete* [SIA] (Stockholm: Utbildningsdepartementet, 1974).

29 Pietikäinen (2007).

30 Nikolas Rose, *The Psychological Complex: Psychology, Politics and Society in England 1869–1939* (London: Routledge & Kegan Paul, 1985).

31 See e.g. Vivien Burr, *An Introduction to Social Constructionism* (London: Routledge, 1995).

strengthened, e.g. in 1882 (ages 7–14) and 1936 (seven-year compulsory schooling).<sup>32</sup> These developments increased expectations for school attendance, making absenteeism a growing concern.

Simultaneously, more children were included in schooling. As education expanded, children of more ages and backgrounds entered the system. However, some groups, such as children who were assumed “uneducable” due to severe disabilities, were long excluded.<sup>33</sup> Others could be exempted due to geographic isolation or economic necessity.<sup>34</sup> This study does not focus on such structural absenteeism. We are instead interested in what can be defined as students’ absenteeism from school in cases where the school expected them to be there. Although, as the initial examples show, such absenteeism existed earlier, it was during 1945–1975 that it became widely recognised as a serious issue in both educational and scientific discourse.

The article is broadly structured chronologically, dividing the period into three phases based on dominant interpretations of absenteeism. However, these phases are not rigid and multiple perspectives coexisted throughout. The division serves to highlight three themes that represent time-bound tendencies.

### **Truancy: school absenteeism as an obedience or maturity problem (1940s and 1950s)**

During the 1940s and 1950s, the term truancy was commonly used to describe school absenteeism, regardless of its underlying cause. It was often framed as a moral issue: a pupil absent without valid reason was seen as failing in their duty and thus behaving improperly. While various explanations were offered, a frequent one was the pupil’s lack of school maturity. Within the prevailing psychocultural framework, truants were often viewed as morally or developmentally immature, and interventions were shaped accordingly.

In school health service records, truancy typically appeared as one aspect of a broader pattern of problematic behaviour. Investigations usually began with a class teacher reporting a pupil to the headteacher, accompanied by notes on the pupil’s educational history and behaviour towards teachers and peers. The headteacher would then decide whether to initiate further assessments. A pedagogical assessment was made in which the ability to benefit from instruction was evaluated. A medical assessment was conducted by the school nurse and/or school doctor, in which the student’s physical condition and any defects were noted. Thereafter, a psychological examination could be conducted with various tests, with intelligence tests being particularly central at the beginning of the period. In severe or doubtful cases, the student was referred to hospital clinics for child psychiatry.

32 SOU 1946:11, *1940 års skolutrednings betänkanden och utredningar 4. Skolpliktstidens skolformer*, 2. *Folkskolan*, A. *Allmän del* (Stockholm: Ecklesiastikdepartementet, 1946).

33 Thomas Barow, “Begreppet ‘obildbar’ som en social konstruktion: Teoretisk diskussion och praktisk tillämpning inom den svenska sinnesslövarden under 1900-talets första hälft,” in *Omsorg i förändring: En vänbok till Karl Grünwald*, ed. Olov Andersson, Thomas Barow, and Magnus Tideman (Stockholm: Intra, 2011); Karl-Georg Ahlström, Ingemar Emanuelsson, and Erik Wallin, *Skolans krav – elevernas behov* (Lund: Studentlitteratur, 1986).

34 Åke Isling, *Kampen för och emot en demokratisk skola. 1. Samhällsstruktur och skolorganisation* (Stockholm: Sober, 1980).

There were pupils in the early school years, particularly the first year, who did not want to go to school due to reasons such as general anxiety and stomach aches. From 1946, these children could undergo a school maturity assessment and, if deemed unready, be placed in a school maturity class or have their school start deferred by a year. Pupils who struggled to keep up academically or were considered immature could be held back to repeat a year. Others, initially placed in mainstream classes, might later be transferred to special classes, such as remedial, outdoor or observation class, depending on their assessed needs.<sup>35</sup>

A clear example of how truancy was interpreted as school immaturity can be found in a 1946 case, in which a boy, initially placed in observation class, was referred to the Göteborg advisory bureau for upbringing issues. The examining doctor described him as a small, immature child who should have waited to start school. "Everything is play to him," the doctor noted; the boy lacked the maturity to remain seated without becoming disruptive. He had stolen, lied, and skipped school. The boy's mother, who had two younger children, reportedly appreciated that he was at school during the day and playing outside in the afternoon. However, the boy took this freedom too far. On one of his first days in the observation class, he persuaded another pupil to skip school with him. They spent the day wandering the city and returned home late. The journey to school was also problematic, as the trams proved too tempting as play spaces. Despite these challenges, the doctor described the boy as bright, sweet and pleasant when allowed to work at his own pace in a calm environment where expectations were not too high. Although somewhat combative, he got along well with peers. He enjoyed schoolwork but tired easily. Over time, the situation improved: no further thefts were reported, and the boy was considered capable of managing independently. Nevertheless, the doctor recommended continued placement in the observation class.<sup>36</sup>

Another case from Gothenburg in 1946 concerned a boy who, following the advisory bureau's recommendation, was transferred to an observation class in the second grade. Outwardly, he was described as cheerful and pleasant, with a desire to appear confident and nonchalant. However, the examining doctor found him beneath the surface to be "quite cowardly and uncooperative, never getting along with the other boys." The boy had stolen from home, including a large banknote from his mother's purse, which he spent with a classmate on a cinema visit, sweets, and a toy pistol he proudly displayed at school. Although he admitted the theft, he showed no remorse. On another occasion, he returned home with a large bicycle he claimed to have borrowed and rode around the city until late in the evening, without his mother knowing his whereabouts. He had also skipped school for four consecutive days, spending the time playing in the city. The boy's mother, a single parent and sole provider, struggled to supervise him due to work obligations. As a result, the child welfare board arranged for his placement in an orphanage. While awaiting placement, he remained in the observation class and spent the summer with relatives in the countryside, a period described as beneficial for him.<sup>37</sup>

Truancy was frequently associated with what was considered generally poor behaviour, such as theft, vandalism, and fighting. In some cases, it was seen as temporary

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35 Stukát and Bladini (1986).

36 Elevakter 1940-tal: Hjälpsskolan Anmälningsblanketter med följesedlar (RAG).

37 Elevakter 1940-tal: Hjälpsskolan Anmälningsblanketter med följesedlar (RAG).

and affective in nature. There are also examples where truancy and misconduct were linked to hereditary factors, particularly by medical professionals. In 1958, a boy in Gothenburg was reported by his class teacher to the advisory bureau for upbringing issues. The reason cited was “neglect at home, plus repeated truancy.” The examination included not only an assessment of the boy but also a detailed description of his family by the assistant child psychiatrist and assistant school psychologist: “Arrives in a group, a typical vagabond entourage. Patient is dressed in outdated clothes. All are dirty.” According to the investigators, the home was “poor but apparently has good cohesion.” They noted that some siblings attended a remedial class, but there were no known physical injuries, and the boy’s development was described as unremarkable. Although he reportedly liked his teachers and classmates, the experts still recommended a transfer to an outdoor school.<sup>38</sup>

Although heredity was rarely given explicit prominence, this case illustrates that professionals did consider it a contributing factor. Medical investigations often included detailed information: the circumstances of the child’s birth, the presence of hereditary diseases, substance abuse within the family, and whether siblings attended remedial or other special classes. Importantly, explanations were not mutually exclusive – a home could be deemed deficient from both hereditary and environmental perspectives.

In the 1940s, the first attempts to systematically understand unwanted student absenteeism emerged. One of the earliest scientifically oriented studies was reported by school home director Harald Vrethammar in 1946. The study concerned 83 boys placed in protective custody, just over half of whom were classified as truants, based on having missed school “at least three times without a valid excuse.”<sup>39</sup> Vrethammar argued that truancy should not be seen as a symptom of delinquency, but rather as “an indication that something has been neglected in the pedagogical or psychological treatment of the individual.”<sup>40</sup> Truants were often described as “deficiently gifted” or “mentally defective,” and Vrethammar advocated placement in remedial class as a first step. He also emphasised that mild, well-considered interventions methods were more effective than harsh disciplinary measures in fostering “socially valuable and happy people.”<sup>41</sup>

Relocation was a common intervention, taking various forms in the student record, such as changing class, school, or transferring to a special class. These options were typically available only in urban areas, meaning some pupils had to be moved considerable distances. A change of environment was often seen as beneficial, offering a chance to break away from negative influences, such as unsuitable peers.

In some cases, the home environment was deemed harmful. A move to the countryside, preferably to relatives, was sometimes proposed. If parental capacity was considered insufficient, the child could be taken into care by the child welfare board, either temporarily or permanently. Placement options included boarding homes, school

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38 Elevakter 1950-tal: Hjälpsskolan Anmälningsblanketter med följesedlar (RAG). It is not entirely clear what this entailed in practice. Open-air schools (friluftsskola) were generally intended for children who had tuberculosis, while health classes (hälsoklasser) were meant for the so-called weak children, but there appears to have been a certain ambiguity.

39 Harald Vrethammar, “Om skolknung och skolkare,” *Skola och samhälle* 27 (1946), 60.

40 Vrethammar (1946), 61.

41 Vrethammar (1946), 62.

homes, protective homes, reformatories, or foster care.<sup>42</sup> The first two were generally for children living far from school, while protective homes were for so-called delinquent children, and reformatories for those who had committed offences. Foster care was used when home conditions were clearly inadequate. However, terminology and practices varied between the municipalities.

These relocations were pedagogical or socially motivated responses to behavioural issues, common in practice and often recommended in expert reports by educators such as remedial teachers and school home directors.<sup>43</sup> Also medical professionals sometimes proposed environmental change. Psychiatrist Svante Nycander, for example, argued that some cases required a “total or partial change of environment,” though he stressed that the most important factor was “insightful cooperation between the home, the school, and the doctor.”<sup>44</sup> His entry on “Truancy and Running Away from Home” in *Psykologisk-pedagogisk uppslagsbok* (Psychological-Pedagogical Encyclopedia) in 1945 reflects a more medically oriented interpretation, viewing truancy as a symptom of “psychological maladjustment, sometimes serious mental health conditions.”<sup>45</sup> Nycander acknowledged that truancy and running away could be understandable responses to adverse circumstances, citing causes such as mental, poor home conditions, or even flaws in the school environment. Severe cases, he argued, should “invariably” be handled by psychological and psychiatric expertise. This illustrates how a dominant psychoculture could manifest differently depending on professional perspective.

The Swedish National Board of Education’s 1947 guide *Skolhygien* (School Hygiene) addressed various behavioural and developmental issues, including truancy, “wandering impulses,” and the turbulence of puberty. In his article, Elov Tengblad highlighted unauthorised absenteeism:

Unauthorised absenteeism is one of the standard offenses in our schools. The reasons are varied, and the severity of the cases particularly diverse. One wakes up too late for morning prayer or the first lesson and prefers to stay home. One fears not knowing the homework, or is simply tired and fed up, granting oneself a day’s rest without being truly ill.<sup>46</sup>

The same year, a study was published involving 44 elementary school pupils aged 7–14 (mostly younger children) who had been reported for severe truancy to Stockholm’s advisory bureau. Gerd Wittrock, an assistant at the bureau, conducted the study in 1944 and identified causes ranging from poor home environments to problematic personality (e.g. weak-willed, vagabond nature, shyness, immaturity). Some children were described as cheerful and carefree but poorly behaved; however, the most common explanation was a nervous, anxiety-prone disposition. “Fear of strict teachers, teas-

42 See e.g. Qvarsell (1985).

43 Beside Vrethammar (1946), a similar perspective is found in for example Lars Landin, “Skolkning-problemet i folkskolan,” *Folkskolan – Svensk lärartidning*, no. 1–2 (1953) and Lars Landin, “Skolk,” *Psykologisk-pedagogisk uppslagsbok* 3 (1956).

44 Gunnar Nycander, “Skolkning och rymning från hemmet,” *Psykologisk-pedagogisk uppslagsbok* 3 (1945), 1650.

45 Nycander (1945), 1648–50.

46 Elov Tengblad, “Grövre beteenderubbningar och deras behandling i skolan: Pedagogiska synpunkter,” in *Skolhygien* (Stockholm: Skolöverstyrelsen, 1947), 392–93.

ing peers, and dislike of schoolwork are common,” Wittrock wrote. In some cases, she noted “severe anxiety hysteria” and outright “school horror.”<sup>47</sup>

Although the psycho-cultural landscape of the 1940s and 1950s was not uniform, it was dominated by views that linked absenteeism to deficiencies in personality, intelligence, or home environment. Student records show that many pupils returned for repeated assessments, some annually, others after several years. The prevailing view was that absenteeism was a symptom of deeper issues, a perspective reflected in most case notes. Yet the reasons for absenteeism were rarely clear-cut, and in the often vague descriptions from school health services, symptoms and causes were not clearly distinguished. One boy’s record from the late 1950s reads:

Truancy is likely a matter of a condition involving generally deficient maturity, emotional instability, restlessness, poor concentration, and low endurance. Tendency towards headaches, so-called navel colic, and vomiting. Poor bowel control, unstable peer relationships, and pronounced suggestibility.<sup>48</sup>

Truancy was thus used as a general label, regardless the underlying cause. While anxiety and fear were acknowledged, as in the work of Wittrock and Nycander, proposed remedies often focused on environmental change. Nycander’s approach also reveals a moral undertone, equating truancy with running away from home, implying that the core issue lay in disobedience itself. Over time, however, greater attention was paid to the diversity of causes. The relationship between school and home, or more precisely between expert and family, was typically paternalistic in the early period, influenced by class and gender biases, with professionals often adopting a patronising tone.<sup>49</sup>

### **School phobia: school absenteeism as an anxiety problem (1960s)**

During the 1960s, growing attention was paid to school absenteeism linked to anxiety-driven refusal to attend school, a condition increasingly referred to as “school phobia.” Although both practitioners and expert texts in the 1940s had acknowledged anxiety and “school horror,” the topic became significantly more prominent in the 1960s. With the emergence of the term school phobia, truancy was conceptually divided within the prevailing psychoculture into two distinct phenomena. Previously regarded as variations of the same issue, truancy and school phobia came to be seen as fundamentally separate, sharing only the outcome of school non-attendance.

In 1960, a boy was examined for school refusal at the school counselling bureau in Malmö. As the case proved difficult to resolve, it was referred to the child psychiatric clinic. Following assessment, the chief physician informed the headteacher that the boy’s refusal to attend school was “nervously conditioned.” Several treatment options were considered, including applications to two “school homes for nervous children,” though no places were available. The physician noted that the boy’s intelligence was adequate, ruling out cognitive impairment as a cause. To support the boy’s recovery, individualised instruction was recommended. The physician proposed home instruc-

47 Gerd Wittrock, “Skolkningsproblemet,” *Folkskollärarnas tidning*, no. 83 (1947), 6.

48 Elevakter 1950-tal: Meddelande från skolpsykologibyran (RAG).

49 Cf. Börjesson and Palmblad (2003), 106–7.

tion, ideally provided by a “teacher already known and accepted” by the boy. The boy’s father, himself a teacher, suggested a suitable candidate for this arrangement.<sup>50</sup>

Another case from 1960 involved a boy in Göteborg who was reported by his teacher due to serious difficulties interacting with peers. The problems were considered so severe that he was referred for assessment at a child psychiatric clinic. According to the school psychiatrist, the boy was diagnosed with a “severe neurotic syndrome.” Despite showing a very positive attitude towards his teacher, he experienced intense anxiety related to school and his classmates. He was described as “almost constantly troubled by headaches, poor appetite, and night terrors.” The school psychiatrist and assistant school psychologist concluded that, despite the school’s commendable efforts, it had failed to provide a sufficiently safe environment for this “psychologically handicapped child.” As a result, the mother was advised to move with the boy to the countryside, where he could continue his education in a calmer setting. If this was not possible, home instruction was recommended as an alternative. The professionals emphasised that this was a case of “neurotic school refusal” that should not be classified as truancy.<sup>51</sup>

In a referral to the advisory bureau in Malmö in the early 1960s, a girl was treated who had developed what was described as “some kind of inferiority complex” during her schooling. According to the bureau’s physician, she struggled academically and had become resigned to her schoolwork. Her indifferent and disengaged attitude was interpreted as “an expression of nervous blockage phenomena.” The girl was assessed as well-gifted, and it was deemed that targeted pedagogical interventions were needed to restore her self-confidence and motivation. Supported by the headteacher, the physician recommended placement in a pedagogical observation class. This intervention was initially considered successful: the girl reportedly became more confident and socially engaged, and the placement was concluded. She returned to a regular class the following school year. However, she soon began to skip school again, prompting a new investigation. The physician described this as a paradoxical and difficult-to-understand development. As a possible explanation, he pointed to the emotional impact of her father’s death a few years earlier, suggesting that unresolved grief continued to affect her. Psychological testing indicated that the girl had “a sense of her own inadequacy” but expressed a desire to improve academically. She admired her older brother, who was studying at a folk high school, and aspired to emulate him. The physician at the advisory bureau therefore concluded that:

... behind the girl’s truancy there was not some ordinary, trivial school fatigue, but rather the truancy could be better described as a form of “school phobia,” behind which lies, from certain perspectives, a weak constitution, now probably further reinforced by a sense of inadequacy in terms of performance due to the frequent school absences.<sup>52</sup>

With this diagnosis, a return to the pedagogical observation class would hardly solve the problems. Instead, the doctor recommended another relocation: that the girl should

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50 Elevakter 1960-tal: Rektorsområdet för specialundervisning (MSA).

51 Elevakter 1960-tal: Handlingar, skolhälsovården och andra skolsociala frågor (RAG).

52 Elevakter 1960-tal: Rektorsområdet för specialundervisning (MSA).

be placed in a parallel class with a health focus, so he could also continue to maintain contact with the girl.<sup>53</sup>

As these examples show, anxiety-related school absenteeism became more distinctly separated from truancy. This division also appeared in expert texts.<sup>54</sup> In his book *Skolpsykiatri* (School Psychiatry), published in 1962, Elis G. Regnér, chief physician at the child and adolescent psychiatric clinics in Gothenburg, presented a typology of school absenteeism based on earlier studies and his own clinical experience. Regnér identified three distinct forms of absenteeism. The first, truancy among younger children, was seen as a sign of emerging maladjustment, typically attributed to poor parenting and a lack of attention in homes marked by “social deficiencies.” The second type, puberty-related school aversion, referred to older pupils whose truancy was understood as a different phenomenon, linked to adolescent development. The third and clearly differentiated type was neurotic school refusal, in which the child wanted to attend school but was unable to do so due to anxiety. These children often experienced physical symptoms, such as stomach aches, headaches, or morning distress, that prevented them from leaving home. The anxiety was typically related not to school itself, but to separation from home, according to Regnér, although causes varied. In some cases, overprotective or anxious mothers were seen as contributing factors, keeping children at home through excessive care. In others, the child’s own constitution or increasing academic pressure were cited. Unlike typical truants, whom Regnér described as giving a “primitive lazy impression,” neurotic school refusers were often conscientious. They might complete homework and prepare their school bag the night before, only to be unable to leave home the next morning, a behaviour that could be exacerbated by overprotective parents.<sup>55</sup>

Neurotic school refusal, or school phobia as it came to be known, required different interventions than truancy, typically more medical than pedagogical or disciplinary, although environmental change was sometimes considered. According to Regnér, many cases needed to be referred from the advisory bureau to a hospital’s paediatric ward or, preferably, to a child psychiatric unit. Some children were admitted for observation and treatment. Regnér argued that such hospitalisation allowed children to realise that living apart from home and their mother was not as frightening as they had imagined.<sup>56</sup>

The student records reveal that long waiting times for child psychiatry were a recurring problem. Students who were placed on the waiting list for a school psychiatric clinic could sometimes wait up to six months before getting an appointment. It is also noted that medication was sometimes used. Sedative drugs like Atarax could be used in cases of aggressive behavior or in connection with severe anxiety.

In summary, the growing focus on anxiety-related absenteeism led to a conceptual division within the psychocultural framework: truancy and school phobia came to be

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53 Elevakter 1960-tal: Rektorsområdet för specialundervisning (MSA).

54 i.e. Jan Bonnevier, “Skolvägrare och skolskolkare,” *Svenska läkartidningen*, no. 58 (1961); Johan Öbrink, *Skolbarns skolkniv: En psykologisk-pedagogisk undersökning* (Stockholm: Svensk lärareidnings förlag, 1964). See also Johan Öbrink, “Skolk,” in *Skolan och disciplinen*, 2<sup>nd</sup> ed., ed. Torsten Husén and Ingvar Carlson (Stockholm: Skolvärlden, 1968).

55 Elis G. Regnér, *Skolpsykiatri* (Stockholm: Almqvist and Wiksell, 1962), 131–38.

56 Regnér (1962), 137.

understood as two distinct phenomena, each with its own explanations and recommended interventions.

### **School fatigue: school absenteeism as a dissatisfaction issue (1970s)**

From the late 1960s, following the expansion of the comprehensive school system to include grades 8 and 9, and the division of compulsory schooling into lower (year 1–3), middle (4–6), and upper (7–9) stages, student absenteeism increasingly came to be discussed in terms of school aversion or dissatisfaction. While notions of truancy as misconduct or anxiety-related absenteeism remained present in school health practice and academic discourse, absenteeism was now more frequently framed as a response to dissatisfaction. This shift placed less emphasis on constitutional factors and opened the psychocultural framework to interpretations that located the cause of absenteeism within the school environment rather than the individual pupil. One measure that became more common during this period was exemption from schooling in favour of work placements or extended practical training.

In a letter to the Malmö School Board, a doctor reported on a girl in the upper grades who had been treated at a psychiatric clinic for several months in the early 1970s. According to the social worker's report, the girl had expressed dissatisfaction with her schoolwork throughout the upper grades, even as early as grade 6. Due to frequent absenteeism, the school nurse had maintained repeated contact with her over the years. Despite various efforts, it proved difficult to engage her in meaningful education. The doctor noted that the girl "experienced feelings of inferiority and felt too mature compared to her classmates." However, she had completed an internship at a nursing home, which she had enjoyed. Both the doctor and the social worker recommended that she be exempted from further formal education and instead be offered an apprenticeship, something the girl herself also wished for. The doctor warned that if she were forced to continue her education, there was a risk she could become mentally "insufficient."<sup>57</sup>

At the Malmö advisory bureau, a boy was treated who had begun to feel dissatisfied in seventh grade, and by eighth grade, his dissatisfaction had grown to the point where he eventually stopped attending school altogether. According to the doctor's report, during his period of truancy, the boy had fallen into bad company and become involved with a "gang engaged in thinner and wine abuse." The boy stated that he no longer wished to attend school and instead wanted to start working. Given this background, he was granted sick leave and was recommended to be exempted from classroom instruction, with the possibility of engaging in practical work.<sup>58</sup>

The following example illustrates a reversed situation, in which satisfaction was given significant explanatory value. A girl in Gothenburg was referred to a school psychologist in the early 1970s for an assessment due to adjustment difficulties and extensive truancy. According to the psychologist, her absenteeism was peculiar, as the girl claimed to enjoy school. She was referred for a risk assessment and, if necessary, a school psychiatric evaluation. The girl performed well on most of the psychologist's tests, and the results indicated that she had average intelligence, although she exhib-

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57 Elevakter 1970-tal: Rektorsområdet för specialundervisning (MSA).

58 Elevakter 1970-tal: Rektorsområdet för specialundervisning (MSA).

ited some difficulties with reading and writing. As a result, she was recommended for individualised special education in reading.<sup>59</sup> Truancy despite satisfaction was thus seen as surprising and something that warranted a school psychiatric investigation.

As demonstrated in examples above, a common intervention was to allow the student to begin working and be exempted from formal schooling. This approach was typical for students in the upper grades and was relatively widespread. As before, re-placement was used as a measure. However, although special classes such as observation classes and reading classes could still be established, the new curriculum introduced in the early 1970s stated that students with learning difficulties should “as far as possible” attend regular classes or receive special education for only a limited number of hours.<sup>60</sup> Consequently, re-placement into alternative types of classes became increasingly rare. As in earlier cases, it appears that re-placement was often implemented somewhat “on a trial basis” without a clearly defined pedagogical or medical rationale.

A girl who had been placed in a school readiness class in Malmö toward the end of the 1960s was referred for a psychological evaluation to determine an appropriate educational placement. According to the school psychologist, the case was difficult to assess due to the girl’s tense and insecure behaviour during the evaluation. As a result, a second psychological assessment was conducted the following year. Based on this evaluation, the psychologist recommended placement in a pedagogical observation class. However, since no such class was available, she was instead placed in a reading class. A few years later, the girl underwent another psychological evaluation, prompted primarily by her extensive absenteeism. During a conversation with her mother, it emerged that the girl had been bullied due to her poor academic performance and frequent truancy. The psychologist noted: “The girl complains at home about fatigue, headaches, and vague stomach problems. She has been examined by the school doctor, who found no somatic basis for these symptoms.” The girl’s schooling history was fragmented, including time in a readiness class, a reading class, and a regular class and frequent contact with the school nurse. Previous evaluations had indicated that her cognitive abilities placed her at the borderline between a regular class and a remedial class. She exhibited “adjustment difficulties in the form of school absenteeism, social isolation, and nervous symptoms of a psychosomatic nature.” Consequently, the school psychologist recommended that she be placed in a remedial class starting in grade 7.<sup>61</sup>

Sick leave could also be used as an intervention, particularly in cases involving anxiety-related school phobia. In a 1969 letter to a principal in Gothenburg, the examining child psychiatrist recommended that a boy who had repeatedly undergone child psychiatric evaluations be placed on sick leave. The clinic had arranged for the boy to receive instruction at a school clinic, but due to a delay in securing an available spot, the psychiatrist suggested that home instruction be arranged during the interim period. Under these circumstances, the psychiatrist concluded that it was justified to place the boy on sick leave.<sup>62</sup>

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59 Elevakter 1970-tal: Rektorsområde: Personakter (RAG).

60 *Läroplan för grundskolan. Allmän del* (Stockholm: Skolöverstyrelsen, 1969), 76–77.

61 Elevakter 1960-tal: Rektorsområdet för specialundervisning (MSA).

62 Elevakter 1960-tal: Handlingar, skolhälsovården och andra skolsociala frågor (RAG).

Over time, it also became increasingly common to use conversation therapy as an intervention. In this context, the role of the social worker grew in importance within the psychoculture. Previously, the social worker had primarily functioned as a coordinator between the school, the home, and various authorities, particularly the child welfare board. However, from the late 1960s onward, the social worker increasingly took on the role of a conversational partner, primarily for the student but also for their guardians.<sup>63</sup> The social worker could also initiate referrals for evaluations by a school psychologist or physician.

During the 1970s, there were increasing instances in which substance abuse was cited as a reason for a student's absenteeism. In earlier records from the study period, references to substance abuse typically concerned the parents. However, in records from the 1970s, the focus shifted more frequently to the student's own substance use, such as sniffing solvents or consuming alcohol. At the time, youth alcohol consumption was a widely debated issue in the media, particularly in connection with experimental policies allowing the sale of beer in grocery stores.<sup>64</sup> Both substance abuse, and the introduction of work placements and conversations with social workers can be linked to the expansion of the upper stage (years 7–9), which brought older students into the school system than before.

This is illustrated by the following example from Stockholm. At the end of the 1960s, a girl in grade 9 was reported for irregular school attendance after having missed 249 lessons. According to her own account and a certificate from a parent, the absences were due to sleep problems. The class teacher noted that she, when attending, demonstrated an active intellect, showed interest, and had a good capacity to benefit from instruction. In the social investigation, the social worker argued that the exceptionally high level of absenteeism had to be classified as truancy. During the initial contact with the student and her mother, earlier difficulties were also discussed. The social worker's contact with the girl's previous school had revealed that she had "experienced psychological issues before." This was downplayed by the mother, who interpreted it as normal puberty-related problems. The mother emphasised that the girl was receiving conversational therapy from a doctor and was now calmer than she had been following her parents' divorce five years earlier. The mother attributed primarily to the father's alcohol abuse. However, the girl reportedly missed her father deeply, as he had been the softer and more affectionate parent.<sup>65</sup>

Then followed what could be described as psychoanalytic explanations for the girl's difficulties.<sup>66</sup> The social worker wrote that the girl was, in some way, unhappily in love with her mother, while at the same time blaming her for the unhappy marriage between the parents. She often brooded over her parents' relationship and the reasons behind their constant arguments. Although she was motivated to attend school, both

63 Anna Larsson, "Mobbningsfrågan i förändring: Efterkrigstidens synsätt på skolbarns kamratliv," *Historisk tidskrift* 130, no. 2 (2010), 241–64.

64 SOU 1971:66, *Mellanölsfrågan* (Stockholm: Finansdepartementet, 1971); Lena Eriksson and Helena Bergman, "Acceptable Use: Morality and Credibility Struggles in Swedish 1960s Alcohol and Illicit Drug (Ab)use Research and Policy," *Minerva* 60 (2022), 419–40.

65 Elevakter 1970-tal: Stockholms folkskolors specialklasser, Elevakter (SSA).

66 Zetterqvist Nelson (2012), 60, has shown that psycho dynamic theory dominated the child treatment ideology of the time.

her own and her mother's high expectations became overwhelming. After a few sleepless nights, she would often stay home, and falling behind only worsened her anxiety. On the first day back in January, after a sleepless night, she broke down in the school nurse's office, tearfully explaining that she had spent the night worrying about the term ahead despite a restful holiday. Her mother was reportedly surprised, as there had been no signs of distress that morning. The mother and the social worker discussed ways to support the girl. A boarding school was considered, offering a neutral setting free from emotional outbursts, but this was ruled out due to cost and lack of space. Instead, they hoped continued support from child psychiatric services would help her complete the term and finish school.<sup>67</sup>

In the 1970s, the distinction between truancy and neurotic school refusal became increasingly pronounced in scientific literature, as research began to focus more specifically on one or the other. Sonja Ilander Åhlén's licentiate thesis from 1972 did not address truancy at all but instead concentrated on emotionally based school refusal. Ilander Åhlén adopted the term school phobia, noting that it had become the most commonly used designation for children's refusal to attend school at the time.<sup>68</sup> Her work provides a thorough critical examination of the concept and a comprehensive overview of international research. Ilander Åhlén's own study was based on patient records from the Child and adolescent psychiatry clinic in Örebro, covering the years 1956 to 1970. She identified 106 patients who met the criteria for school phobia, described as school refusal or periodic school refusal.<sup>69</sup> The records showed a fairly even gender distribution among the treated children. The children were between 9 and 14 years old, with a predominance of older children. The number and proportion of cases had increased over time. The children were described in the records as shy and anxious but also willful and sometimes dominant. They were often described as performance-oriented and (over-)ambitious with a strong attachment to their mothers and difficulties with peer relationships. Separation anxiety did not appear in the descriptions of the children in the records; rather, a passive defiance in refusing to be separated from their parents. The mothers were often described as overprotective and overambitious, while the fathers were seldom mentioned.<sup>70</sup>

In contrast to Ilander Åhlén's focus on school phobia as a fear-based inability to attend school, Lennart H.S. Nilsson's licentiate thesis addressed non-health-related "sporadic absenteeism" or "short-term absenteeism."<sup>71</sup> While previous perspectives often located the problem within the student, Nilsson shifted the focus to school conditions and the organisation of the school itself, which he argued needed to be addressed. By comparing student responses from various high school programs and from grades 8 and 9 in elementary school and relating these responses to factors such as school

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67 Elevakter 1970-tal: Stockholms folkskolors specialklasser, Elevakter (SSA).

68 Sonja Ilander Åhlen, *Skolfobi: Skolvägran av emotionella orsaker* (Uppsala: Uppsala University, 1973), 25.

69 Ilander Åhlen (1973), 165.

70 Ilander Åhlen (1973), 175.

71 Lennart H.S. Nilsson, *Elevfrånvarons omfattning och samband med skolförhållanden: Problembelysning mot bakgrund av information från skolpersonal och elever inom gymnasieskolor i område av låg urbaniseringsgrad men utan glesbygdens karakteristika* (Göteborg: Göteborg University, 1974).

organisation, unengaging teaching, and poor teacher-student relationships, Nilsson portrayed truancy as a reaction to the school's "faults."

Thus, while Iländer Åhlén's work dealt with school phobia, Nilsson's research focused on truancy among older students, where school fatigue emerged as a prominent cause. One could argue that, within the framework of the psychoculture, unwanted school absenteeism had by this point fragmented into three distinct phenomena: school phobia, truancy as immaturity among younger children, and truancy as school fatigue among adolescents. This division has largely persisted since then, although in recent years a new type of amalgamation has emerged, with some researchers discussing a psychiatrisation of the truant.<sup>72</sup>

### **Concluding discussion**

We have identified three main interpretations of unwanted school absenteeism within the psychoculture of the studied period: truancy, school phobia, and school fatigue. All three appear throughout the period, though with varying emphasis over time.

Truancy, often seen as a matter of disobedience or immaturity, was especially prevalent in the 1940s and 1950s. It was typically explained by poor upbringing in unstable families (e.g., divorce, substance abuse, poverty) or by perceived character flaws in the child (e.g., immaturity, low ability, psychological issues). The most common interventions were reassignments to a new school, class, or home environment. When teachers' efforts proved insufficient, students with high absenteeism were referred to school counseling agencies and sometimes to hospital-based child psychiatric evaluations.

School phobia, initially called school fear or neurotic school refusal, gained prominence in the 1960s. It was understood as an anxiety disorder, often linked to the child's or mother's nervous disposition. Separation anxiety was a common explanation. This diagnosis helped distinguish between disobedient truancy and psychologically rooted school refusal. While truancy called for disciplinary or educational measures, school phobia often required therapeutic interventions. Environmental changes were still common, but homeschooling and medical treatment were also considered. During this period, schools increasingly relied on psychosocial professionals – psychologists, social workers, and occasionally school psychiatrists – while hospital-based child psychiatry also played a growing role. The earlier central advisory bureaus were gradually phased out in favour of school-based and clinical expertise.<sup>73</sup>

School fatigue was linked to teenagers' dissatisfaction with school and gained increasing attention from the late 1960s. School fatigue was primarily an issue among students in the upper grades of the mandatory school. Although the individual or their family could be seen as part of the problem, school fatigue as an interpretation opened up for criticism of the school as boring or meaningless for some students. The most common intervention for severe school fatigue was exemption from regular schooling in favour of work placements or internships. In these cases, the social worker played

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72 Ek (2018).

73 See e.g. Rydelius (2012); Jönson (1997); Karlen (1985).

a central role, but school psychologists and the newly established profession of career counsellors also were involved.<sup>74</sup>

In practice, as reflected in student records, the three interpretations truancy, school phobia, and school fatigue are sometimes clearly distinguishable but often appear mixed or overlapping. The choice of intervention often seems tied to what was locally available. A student assessed as needing one type of special class might be placed in another due to limited options. Measures were sometimes applied in sequence, seemingly without a clear rationale.

The discussions and handling of unwanted school absenteeism show both continuity and change over time, reflecting the evolving psychosocial culture. Earlier in the period, genetic and racial hygiene explanations occasionally appeared but had largely disappeared by the end. Throughout, individual psychological explanations dominated, with the child often seen as the bearer of the problem. Even when environmental factors gained more attention later, the focus remained largely on the individual. The family – especially the mother – was consistently seen as central, though more directly in the early years and more indirectly later. The reverse applied to the school, which gained more attention as a contributing factor over time. Peer groups were also considered influential throughout, often evaluated as either positive or negative. Substance abuse was a recurring theme, initially referring to parents but later increasingly to the students themselves.

A morally evaluative tone was more prominent early on, with families described as “socially deficient” or “valuable,” and children as “poorly raised” or “nice.” Over time, this gave way to a more therapeutic language. Conversation therapy emerged as a treatment method, involving both the child’s and the parents’ experiences and wishes.<sup>75</sup> Overall, parental perspectives seem to gain increasing significance over time, with a growing emphasis on including them. Although implicit norms related to class, gender, and ethnicity can be sensed throughout the period, expressions of these norms are both more common and clearer at the beginning.

It is clear that school health services underwent significant development during the examined period. Much like Karin Zetterqvist Nelson’s characterisation of child psychiatry in the same period, school health services must be understood as “a professional field in motion.”<sup>76</sup> Teachers (and their principals) were, of course, always central professional groups in handling unwanted school absenteeism; they were the ones who noticed the absences and initiated an investigation. Depending on the student’s placement, remedial class teachers or other special education professionals could be involved.<sup>77</sup> The school nurse and school doctor were often involved, and in more complex cases, also the child welfare committee or child psychiatry. During this time, the psychosocial branch of school health services expanded, with a growing number of

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74 Margareta Vestin, *Femtio år med syo: 1940/41–1990/91: Mål, program, verksamhet för svensk studie- och yrkesvägledning: En syo-historia i urval* (Stockholm: Skolöverstyrelsen, 1991).

75 Cf. Zetterqvist Nelson (2012) who has placed this change around 1960. Koskela and Vehkalahti (2017), 473, locates a similar change in Finland in the 1970s.

76 Zetterqvist Nelson (2012), 55.

77 Jfr Stukat and Bladini (1986).

school psychologists and social workers employed.<sup>78</sup> While the formulation of school phobia usually required psychiatric expertise alongside special education, school fatigue called more for psychosocial expertise. As a result, school social workers came to play an increasingly prominent role in addressing unwanted school absenteeism.

To conclude, the changes in psychoculture during the studied period can be understood in relation to specific historical and social changes in education and society. The expansion of the school system, accommodating more and older students, introduced new challenges related to discipline, adjustment and support. The growing variety of special classes and residential schools also influenced which interventions were considered possible or appropriate. These institutional changes, along with the diversification of the professional field, shaped how school absenteeism was interpreted and managed. Current models of interpretation are thus not only shaped by politics and scientific knowledge, but also by available treatment options, institutional structures, societal expectations, and the evolving roles of professionals within the school system.

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<sup>78</sup> Cristine Isaksson and Anna Larsson, "Skolkuratorsyrkets framväxt och utveckling i Sverige," *Socionomens forsknings supplement*, no. 32 (2012).

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SSA: Stockholm Stadsarkiv

RAG: Regionarkivet i Göteborg

MSA: Malmö Stadsarkiv

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# “Needed and Valuable Instead of Just Being Employed”: Vocational Training, Work and Social Usefulness Regarding People with Intellectual Disability in Sweden, 1945–1989

Thomas Barow

*Abstract* • The article explores the transition of Swedish students with intellectual disability (ID) into the labour market between 1945 and 1989, a period often overlooked in historical studies on special education and disability research. It analyses the concept of employability in the history of education for this marginalised group, shedding light on the justification for vocational education and on the significance of economic shifts, follow-up studies, and sheltered workshops. Drawing on ableism and pedagogical theory, it underscores qualification, socialisation and subjectification as key educational domains. Utilising professional literature and policy documents, the article suggests a broader understanding of employment creation, considering changes in the labour market and care services. From an ableist perspective, the emphasis on employability leads to a paradox. Due to the overvaluation of functionality and capability, inclusion in work life may result in reduced recognition for those who deviate from the norm.

*Keywords* • ableism, disability history, employment, intellectual disability, Sweden

## Introduction

In many countries, employment and work are essential for being respected as an adult and an established member of society, in terms both of self-image and from the perspective of others. However, throughout modern history, people with intellectual disability (ID) or with historical categorisations that highlight deviance from the cognitive norm have been marginalised.<sup>1</sup> This is the case to varying extents around the globe and in many spheres of life, not least in vocational education, employment and access to the labour market. The topicality of these issues raises questions concerning the history of work opportunities for this vulnerable group of people.

However, individuals with ID are not a homogeneous group, neither historically nor today. On the one hand, the terminology used to describe this population has evolved, a process that continues to this day. The designation of the target group has shifted over time, from terms such as *idiots* to *feeble-minded*, to *mentally retarded*, and ultimately to *intellectual disability*. Although there is a degree of overlap in the descriptions of these

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1 This article uses contemporary terminology concerning disability categorisations, while maintaining a critical stance through the use of quotation marks. For a deeper discussion around the problem of stigmatisations and changing categorisations, see e.g. Robert L. Schalock, “The evolving understanding of the construct of intellectual disability,” *Journal of Intellectual & Developmental Disability* 36, no. 4 (2011); Michael L. Wehmeyer, ed., *The Story of Intellectual Disability: An Evolution of Meaning, Understanding, and Public Perception* (Baltimore: Brookes Publishing, 2013). People-first language – mainly the term “people with ID” – is used for more overarching analyses relevant to the present.

populations, medical advancements and social changes have significantly altered their composition. This includes, for example, life-saving heart surgeries for individuals with Down's syndrome, the expansion of child healthcare centres, as well as, more recently, the emergence of prenatal diagnostics. Karl Grunewald has highlighted that what was then referred to as the school for the “feeble-minded” (*sinnesslöskola*) primarily served as a school for the poor.<sup>2</sup> He demonstrated that while the total number of individuals classified as having an intellectual disability decreased during the second half of the twentieth century, the proportion of those with severe impairments increased. Crucially, the concept of educability has been defined in various ways – based on literacy, intelligence test scores, and the capacity to carry out practical tasks.<sup>3</sup> Finally, the social stigmatisation of being “non-educable” (*obildbar*) was abolished in 1967/68. It is therefore scarcely appropriate to equate, for instance, the “feeble-minded” (*sinnesslöa*) of the 1920s with persons with intellectual disability (*personer med intellektuell funktionsnedsättning*) in the 2020s. The categorisation of *intellectual disability* is used here, similarly to its historical predecessors, as an umbrella term for a heterogeneous group of people whose commonality lies, in education, in the vague assumption that they are unlikely to achieve the learning objectives of regular primary education.

Obtaining and maintaining a job has been a significant challenge for these individuals, who were perceived as deviating from societal norms. This article uses Sweden as an example of the historical development of employment and work for people with ID in a Scandinavian welfare state. From the mid-nineteenth century onwards, the catchy Swedish slogan *från tärande till närande* (“from debilitating to nourishing”) has been a central motif in the education and care of the “feeble-minded.”<sup>4</sup> The idea that everyone can make their own living and thereby reduce society's costs was also a common theme in the first half of the twentieth century. If employability were a way to achieve societal inclusion, defaulting from this norm would legitimise exclusion. This perspective has deep roots in the overvaluation of work, especially in Western societies.<sup>5</sup> For Sweden, as Staffan Bengtsson puts it, the “early Protestant work ethic emphasised the duty of every member of society to contribute and strive for economic independence.”<sup>6</sup>

2 Karl Grunewald, *Från idiot till medborgare: de utvecklingsstördas historia* (Stockholm: Gothia, 2008), 289.

3 Thomas Barow, “Begreppet ‘obildbar’ som en social konstruktion. Teoretisk diskussion och praktisk tillämpning inom den svenska sinnesslövärdn under 1900-talets första hälft,” in *Omsorg i förändring. En vänbok till Karl Grunewald*, ed. Olov Andersson, Thomas Barow, and Magnus Tideman (Stockholm: Intra, 2011).

4 Described in detail by Staffan Förhammar, *Från tärande till närande: handikapputbildningens bakgrund och socialpolitiska funktion i 1800-talets Sverige* (Stockholm: Almqvist & Wiksell International, 1991).

5 For a broader introduction, see Radu Harald Dinu and Staffan Bengtsson, “Introduction: Disability and Labour in Modern Societies,” in *Disability and Labour in the Twentieth Century: Historical and Comparative Perspectives*, ed. Radu Harald Dinu and Staffan Bengtsson (London and New York: Routledge, 2023). Specifically concerning Sweden, see Thomas Barow, “Undesirable Citizens: Education, Care and Control of the ‘Feeble-minded’ in the Swedish Province of Malmöhus, 1900–1950,” *ALTER – European Journal of Disability Research* 5, no. 2 (2011), 108.

6 Staffan Bengtsson, “For Society and the Individual: Disability and Work in Post-War Sweden,” in *Disability and Labour in the Twentieth Century: Historical and Comparative Perspectives*, ed. Radu Harald Dinu and Staffan Bengtsson (London and New York: Routledge, 2023).

The second half of the twentieth century is so far a largely under-researched field in Sweden’s history of people with ID. However, the period from 1945 to 1989 marked the rise and heyday of the Nordic welfare state. From a broader perspective, this epoch – and the 1960s in particular – was a time of active reforms and innovations in education and social policy. In the second half of the twentieth century, the concepts of normalisation and integration developed their full strength in Sweden and beyond,<sup>7</sup> driven by progressive social policies and, not least, by parental advocates as agents of civil society. The most significant organisation was the Swedish National Association for People with Intellectual Disability (*Föreningen för utvecklingsstörda barn*, FUB), founded nationally in 1956 and still an essential protagonist in advocating for the rights of this group today. As its ombudsman, Bengt Nirje formulated the principle of normalisation in the late 1960s, thereby providing an ideological foundation for the ensuing reforms.<sup>8</sup> Similar developments can be observed in neighbouring northern European countries such as Denmark.<sup>9</sup>

Important international agreements on disability issues, including aspects of work, were reached between 1945 and 1989. At the beginning of the period, the 1948 Universal Declaration of Human Rights stated that everyone “has the right to work, to free choice of employment, to just and favourable conditions of work and to protection against unemployment.”<sup>10</sup> The 1971 UN Declaration on the Rights of Mentally Retarded Persons emphasised the right to “perform productive work and engage in any meaningful occupation.”<sup>11</sup> In 1982, the World Programme of Action Concerning Disabled Persons emphasised full participation, among other things, through work “provided through open employment.”<sup>12</sup>

When considering international developments, the difficulties that people with ID face in obtaining employment appear widespread. In the United States, sheltered workshops that emerged from the 1960s onwards received significant criticism due to their “exploitative and demeaning labour practice.”<sup>13</sup> David Kilgannon has noted similar

7 Jan Tøssebro et al., “Normalization Fifty Years Beyond: Current Trends in the Nordic Countries,” *Journal of Policy and Practice in Intellectual Disabilities* 9, no. 2 (2012).

8 For the development of FUB and the normalisation principle, see Olov Andersson, *Några trådar i FUB-väven: om Riksförbundet för utvecklingsstörda barn, ungdomar och vuxna, FUB, från 1950-tal till 1980-tal* (Halmstad: Högskolan Halmstad, Wigforssgruppen för välfärdsforskning, 2002); Thomas Barow, “Sveriges väg till integrering. Bengt Nirje och Karl Grunewald, två ’pionjärer’ i specialpedagogik i norra Europa, om eugenik, mentalitetsförändringar och normalisering,” *Nordisk Tidsskrift för Specialpedagogik* 81, no. 3 (2003); Thomas Barow, “Normaliseringens uppkomst och tidig utveckling i Sverige,” *Handicaphistorisk Tidsskrift* 28 (2012).

9 Comprehensively delineated by Birgit Kirkebæk in *Normaliseringens periode: dansk åndssvageforsorg 1940–1970 med særligt fokus på forsorgschef N.E. Bank-Mikkelsen og udviklingen af Statens Åndssvageforsorg 1959–1970* (Holte: SOCPOL, 2001).

10 United Nations, “Universal Declaration of Human Rights”, § 23, <https://www.un.org/en/about-us/universal-declaration-of-human-rights>.

11 United Nations, “Declaration on the Rights of Mentally Retarded Persons”, <https://www.ohchr.org/EN/ProfessionalInterest/Pages/RightsOfMentallyRetardedPersons.aspx>

12 United Nations, “World Programme of Action Concerning Disabled Persons”, <https://www.un.org/development/desa/disabilities/resources/world-programme-of-action-concerning-disabled-persons.html>.

13 Jordan A. Conrad, “On Intellectual and Developmental Disabilities in the United States: A Historical Perspective,” *Journal of Intellectual Disabilities* 24, no. 1 (2020), 96.

developments in Ireland and England – the establishment of sheltered workshops in the 1960s and the intense criticism that followed. These institutions contributed only to a minimal extent to integration into the open labour market.<sup>14</sup> In other countries, such as Malta, employment opportunities were not available to people with ID, and day services only began to emerge in the 1970s.<sup>15</sup>

Developments in the respective countries must be understood within their specific national contexts. In the case of Sweden, historical research can help foster a deeper understanding of the situation of people with ID in relation to the development of the Nordic welfare state. These people were often marginalised in many respects, not least regarding the labour market.<sup>16</sup> Their employability was a crucial motif behind the 2013 curriculum reform for school pupils with ID.<sup>17</sup> At the same time, presenting and analysing Swedish developments opens up the possibility of international historical comparison and is relevant to a global audience. By doing so, the role played by work and employment for a group of socially marginalised people should become clear, together with what approaches were pursued to mitigate the consequences of this marginalisation, if not to overcome it entirely.

### *Aim of the study and research questions*

This article outlines and analyses the significance of employability and work in Sweden's education and social history concerning young people with ID. The research contributes to a more comprehensive understanding of employment perspectives for a vulnerable group of young people in the Swedish welfare state. In this context, the article addresses the arguments that justify vocational education for pupils with ID. Moreover, it discusses the impact of a changing economy and the significance of follow-up studies and sheltered workshops. To achieve these objectives, two overarching research questions were formulated:

1. What were the central motives concerning work and employment underlying the education of young people with ID and their transition from youth to adulthood?
2. What continuities and changes can be identified in Swedish society during the researched period regarding the creation of work and employment opportunities for people with ID?

14 David Kilgannon, *Intellectual Disability and Ireland, 1947–1996: Towards A Full Life?* (Liverpool: Liverpool University Press, 2023).

15 Anne-Marie Callus, Isabel Bonello, and Brian Micallef, "Advocacy and Self-Advocacy in Malta: Reflections on the Lives of Maltese People with Intellectual Disability from the 1950s to the Present Day," *British Journal of Learning Disabilities* 50, no. 2 (2022).

16 See Jessica Arvidsson, *Sysselsättning och social rättvisa: en nationell registerstudie om 12269 unga vuxna med intellektuell funktionsnedsättning* (Halmstad: Högskolan i Halmstad, 2016); Hege Gjertsen, Stefan Hardonk, and Jens Ineland, "Work Inclusion for People with Intellectual Disabilities in Three Nordic Countries: The Current Policy and Challenges," *Scandinavian Journal of Disability Research* 23, no. 1 (2021); Helena Taubner and Renee Luthra, "Meaningful Occupation for Adults with Intellectual Disability," In *The Palgrave Encyclopedia of Disability*, ed. Gabriel Bennett and Emma Goodall (Cham: Palgrave Macmillan, 2024).

17 See SOU 2011:8. *Den framtida gymnasiesärskolan: en likvärdig utbildning för ungdomar med utvecklingsstörning: betänkande* (Gymnasiesärskoleutredningen. Stockholm: Fritze, 2011).

### *Historical research about the working situation of people with ID in Sweden*

Previous historical research on people with ID mainly focuses on the years before 1945. As a crucial part of the emerging social disability research, the development of institutions for the “feeble-minded,” primarily boarding schools, care homes and work homes, was examined for the first half of the twentieth century. Based on the ambition of the 1960s and 1970s to eliminate large special institutions for people with ID, the historical development of the first half of the twentieth century is outlined from a critical perspective. According to Mårten Söder, “resigned pessimism” took over in the first decades of the twentieth century, and planning focused on “life-long institutional care.”<sup>18</sup> However, recent research on the interwar period has instead emphasised a “new type of optimism characterised by rationalism and a positivistic belief in progress.”<sup>19</sup> From this perspective, employability and the ability to work were common themes in the efforts of educators and social administrators throughout the first half of the twentieth century, based on both the motif of reducing costs *and* benefiting the individual. Some follow-up studies on the post-school development of the “feeble-minded” have been conducted, and it was mainly increased demand for labour that made it easier for this group of people to be employed.<sup>20</sup> However, many worked in the sheltered environment of institutions such as boarding schools or working homes, keeping expenditure low for the public or private operators. In the first half of the twentieth century, attempts were made to establish controlled family care (*kontrollerad familjevård*) by placing school leavers from boarding schools for the “feeble-minded,” for example, as a cheap labour force on farms. Only a small number of people were accommodated in this way.<sup>21</sup>

A study on the southern Swedish province of Malmö highlighted the utilitarian motif in the education and care system and concluded that everybody “had to be productive and socially useful.”<sup>22</sup> This attitude found its expression in the acceptance and approval of sterilisation practices as a robust social policy towards an undesirable group of people.<sup>23</sup> Mainly in the 1940s, sterilisation as a form of social control promoted a “normal” life for people categorised as “feeble-minded.” The connection between education and eugenics has deep roots in Swedish society and has been extensively researched.<sup>24</sup>

18 Mårten Söder, *Anstalter för utvecklingsstörda: en historisk-sociologisk beskrivning av utvecklingen*, 2<sup>nd</sup> ed. (Stockholm: Ala, 1984), 103; all translations by the author.

19 Barow (2011), 114.

20 Söder (1984); Judith Areschoug, *Det sinnesslöa skolbarnet: undervisning, tvång och medborgarskap 1925–1954* (Linköping: Linköpings universitet, 2000); Thomas Barow, *Kein Platz im Volkshaus? Die “Schwachsinnigenfürsorge” in Schweden 1916–1945* (Bad Heilbrunn: Klinkhardt, 2009); Thomas Barow, “Övergång från skola till arbete i ett historiskt perspektiv: den svenska ‘sinnesslövärdan’ under 1900-talets första hälft,” *Vägval i skolans historia* 1 (2015).

21 Barow (2009), 186–90.

22 Barow (2011), 113.

23 Gunnar Broberg and Mattias Tydén, “Eugenics in Sweden: Efficient Care,” In *Eugenics and the Welfare State: Norway, Sweden, Denmark, and Finland*, 2<sup>nd</sup> ed., ed. Gunnar Broberg and Nils Roll-Hansen, 77–149 (East Lansing: Michigan State University Press, 2005).

24 Some examples for this connection: Areschoug (2000), 225–59; Broberg and Tydén (2005); Barow (2009), 203–84; Barow (2011), 111–13; Emma Vikström, *Skapandet av den nya människan: eugenik och pedagogik i Ellen Keys författarskap* (Örebro: Örebro universitet, 2021).

Abuse of power is a research topic in Kristina Engwall's dissertation about Västra Mark, the state-run mental hospital founded in 1931 for "anti-social imbecile" women in Örebro.<sup>25</sup> As in some other places, occupational therapy was used as part of the disciplining care system to minimise operating costs. In the case of the 1960s, Engwall reports on work opportunities for some inmates at hotels and restaurants in the nearest town. These employment opportunities suggest a shift in the care approach.

A contemporary witness published a comprehensive presentation of the history of people with ID in Sweden. Karl Grunewald, who held leading administrative positions in the field from 1961 to 1986, reveals a growing number of places in working homes (*arbetshem*) between 1940 (2,000 places) and 1964 (3,400 places), followed by a rapid decline in the following years (1967: 800 places).<sup>26</sup> According to Grunewald, working homes were viewed as outdated and redundant in the late 1960s, and they were either closed or converted into care homes in 1968. The same author reported a lack of staff training and even some assaults in working homes in the 1940s. For the 1960s and 1970s, Grunewald also points to some cases of exploitation and inhumane treatment in controlled family care.<sup>27</sup>

In summary, historical research on people with ID in Sweden, particularly concerning work and employment, is more comprehensive for the first half of the twentieth century than for the second half. To date, the period between the historical turning points of 1945 and 1989 has been largely overlooked. This research gap demands historical analyses that focus on the reform of the education and care system in general, and on specific aspects of work in particular. This article may contribute to filling this gap, thereby demonstrating the gradual change of the welfare system. This research emphasises educational purposes, the contextual factors of societal development and the institutional responses that emerge from them. Not least for the present and future, this includes an opportunity to reflect on the significance of work and social participation.

### Theoretical orientation

Two theoretical approaches inspire this research. Regarding aspects of education, the study draws on Gert Biesta's three domains of education, providing a framework for the crucial question concerning the purpose of educational efforts. The article further refers to ableism through the theoretical lens of disability studies.

### *Three domains of education*

In recent years, Biesta has raised the crucial question of the purpose of education.<sup>28</sup> He distinguishes between three domains: qualification, socialisation and subjectification. Qualification focuses on providing learners "with the knowledge, skills and

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25 Kristina Engwall, *Asociala och imbecilla: kvinnorna på Västra Mark 1931–1967* (Örebro: Örebro universitet, 2000).

26 Grunewald (2008), 355.

27 Grunewald (2008), 362.

28 Gert Biesta, "Good Education in an Age of Measurement: On the Need to Reconnect with the Question of Purpose in Education," *Educational Assessment, Evaluation and Accountability* 21, no. 33 (2009), 33–46; Gert Biesta, "Risking Ourselves in Education: Qualification, Socialization, and Subjectification Revisited," *Educational Theory* 70, no. 1 (2020), 89–104.

understanding and often also with the dispositions and forms of judgement.”<sup>29</sup> Socialisation describes the “ways in which, through education, we become members of and part of particular social, cultural and political ‘orders.’”<sup>30</sup> Finally, subjectification deals “with the existence of the child or student as a subject of her or his own life.”<sup>31</sup> Against this background, this historical exploration uses Biesta’s systematisation to identify the alignment expressed in contemporary publications, focusing on people with ID. This attempt will help to clarify the educational goals of professionals for this specific group of young people.

### **Ableism**

During recent decades, mainly influenced by the development of disability studies, the term ableism has emerged in the scientific debate on disability. Several meanings exist, varying in their respective societal underpinnings.<sup>32</sup> Kathleen R. Bogart and Dana S. Dunn suggest a comprehensive definition: “*Ableism is stereotyping, prejudice, discrimination, and social oppression toward people with disabilities.*”<sup>33</sup> Fundamentally, the ableism perspective questions the societal dominance of functionality and performance capabilities. Lisa Stafford draws on the economic value that “is predicated on ableist ‘normative’ body-mind requirements declared to be productive in meeting deemed working rates set for profit by economic systems.”<sup>34</sup> People who cannot fulfil these norms are seen as burdens and misfits. However, ableism occurs not only in the form of direct discrimination or other humiliations but also, for example, as hostile and benevolent ableism.<sup>35</sup> In this research, the ableism lens contributes to analysing contemporary standpoints regarding employment and work for people with ID.

### **Methods**

This study seeks to explore various levels of historical development. It is premised on the assumption that such a multi-perspectival approach contributes to a deeper understanding of the complex issues surrounding work and employment for individuals with ID during an innovative phase in the development of the welfare state. To this end, three source types are analysed: green papers, publications by the FUB parents’ association, and scientific studies from the period in question. These sources are publicly available and were accessed through the Swedish national database, Libris, and the University of Gothenburg’s *Supersök* database. Search terms included standard Swedish expressions

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29 Biesta (2009), 39.

30 Biesta (2009), 40.

31 Biesta (2020), 89.

32 For an introduction, see Dan Goodley, *Dis/ability Studies: Theorising Disablism and Ableism* (London and New York: Routledge, 2014); Lisa Stafford, “Disrupting Ableism in Social Work Pedagogy with Maurice Merleau-Ponty and Critical Disability Theory,” In *The Routledge Handbook of Critical Pedagogies for Social Work*, ed. Christine Morley et al. (London and New York: Routledge, 2020).

33 Kathleen R. Bogart and Dana S. Dunn, “Ableism Special Issue Introduction,” *Journal of Social Issues* 75, no. 3 (2019), 651; italics in the original.

34 Stafford (2020), 362.

35 Michelle R. Nario-Redmond, Alexia A. Kemerling, and Arielle Silverman, “Hostile, Benevolent, and Ambivalent Ableism: Contemporary Manifestations,” *Journal of Social Issues* 75, no. 3 (2019), 726–56.

for ID, as well as older terminology, such as “feeble-minded” and “mental retardation” (for example, *sinnesslö, utvecklingsstörd, utvecklingshämmad*, along with their respective nominal forms). An analysis of archival materials, while undoubtedly attractive, would have exceeded the scope of this study.

The green papers, known in Sweden as *statens offentliga utredningar* (SOU), are of particular interest as they occupy the intersection between political and professional discourse. At the same time, they constitute a boundary for more narrowly defined political debates, such as those reflected in parliamentary discussions or white papers, which, due to space constraints, are not included in this study. Many SOUs were produced during the study period, reflecting intensive reform activity.

The publications of the FUB parents’ organisation provide insight into the perspective of an advocacy group. This is relevant because their views were, at the time, only just beginning to gain public visibility. Nevertheless, the available source material from FUB remains limited in this context. A comprehensive historical account of this advocacy organisation, particularly one based on archival records, remains a task for future research.

The third group of sources consists of professional publications from the period under review. In particular, a Nordic professional journal that underwent several name changes was examined: *Nordisk tidsskrift för åndssvageförsorg* (until 1959), *Psykisk utvecklingshämning: Nordisk tidsskrift för åndssvageförsorg* (1960–1961), *Psykisk utvecklingshämning* (1962–1987), and *PU-bladet* (from 1988). Moreover, some research reviews<sup>36</sup> and rare existing dissertations and course literature from the 1960s onwards were examined closely.

The selection criterion for all sources has been the thematic classification of publications in vocational training, employment and work. The results are based on a thematic analysis<sup>37</sup> that leads to five major topics. These topics form the structure of the following section.

## Results

The results of the literature research reveal that the post-school situation of people with ID, their employment and their working life, has been a continuous topic throughout all decades. At the same time, constant marginalisation in the labour market has affected this group of people.

36 These included: Niilo Mäki, “Den pedagogiska-psykologiska forskningen,” *Psykisk utvecklingshämning* 66, no. 1 (1964); Ingrid Liljeroth, “Översikt över sociologisk forskning,” *Psykisk utvecklingshämning* 66, no. 1 (1964); Lars Kebbon and Cecilia Wändell, *Nordisk forskning om mental retardation 1960–1973: en inventering. I. Beteendevetenskaplig forskning* (Stockholm: Socialstyrelsens byrå för omsorger om utvecklingsstörda, 1974); Lars Kebbon and Karin Sonnander, *Nordisk forskning om mental retardation 1974–1979: en bibliografi* (Uppsala: Psykologiska enheten, Forskningskliniken, Ulleråkers sjukhus, 1982); Karin Sonnander and Lars Kebbon, *Nordisk forskning om mental retardation 1980–1985: En bibliografi* (Uppsala: Projekt Mental retardation, Ulleråkers sjukhus, 1987); Anders Gustavsson and Märten Söder, *Social forskning om människor med psykisk utvecklingsstörning: en bibliograferad kommentar* (Stockholm: Rektorsämbetet, Utbildningsförvaltningen, 1990).

37 Virginia Braun and Victoria Clarke, *Thematic Analysis: A Practical Guide* (Los Angeles: SAGE, 2022).

### ***Education and employability between social control and personal development***

In almost every decade (1946, 1957, 1968, 1973 and 1990), the school authorities have implemented curricula for a group of pupils not eligible for regular education. All documents contained some passages on practical training and skills, transition and work. However, until the introduction of the Swedish Care Law (*omsorgslagen*) in 1967/68, a distinction existed between young people categorised as being educable and non-educable. Assumed future employability was crucial in arguing for why education is meaningful, even for pupils with limited knowledge of reading, writing and mathematics. In a keynote speech in 1946, Ragnhild Jungner, the state inspector for the education of the “feeble-minded,” emphasised the need to establish “manual” study programmes for children seen as “developable and receptive for practical education.”<sup>38</sup> She demanded that these children “learn to work with their hands and become practically fit.”<sup>39</sup> An alignment between individual and societal interests characterises her perspective on education:

*We want to make the children viable and socially adapted. Therefore, we aim to bring them back to life. We want to make them fulfil a simple place in society. We strive to teach them such an attitude and decency that they should not deviate too strongly in their encounter with others. However, first and foremost, we want to make them happy, satisfied and happy people.*<sup>40</sup>

At that time, most educational institutions for the “feeble-minded” were organised as boarding schools. However, a state committee on the care of this group saw education as an opportunity to “save many feeble-minded” from living in institutions.<sup>41</sup> The committee report warned that a lack of control could lead to “indolence and asociality.”<sup>42</sup>

After the 1950s, external schools – where pupils lived in their parents’ homes – were seen as an alternative to boarding schools, particularly concerning future employment. Research from the early 1960s highlighted that pupils in external schools were “superior in the question of social maturity.”<sup>43</sup> According to that research, social development is essential to “succeed in society and working life.”<sup>44</sup> This contemporary research critiqued the existing boarding schools and conveyed a pronounced developmental optimism. The era of boarding schools was coming to an end.

The late 1950s and early 1960s were periods characterised by tension between preservation and reform. Education played a crucial role in shaping future employment opportunities. Jungner’s successor as state inspector in the central school administration, Lennart Wessman, promoted external schools. He was convinced that, through

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38 Ragnhild Jungner, “Synpunkter på sinnesslöundervisningen,” *Nordisk tidskrift for Åndssvageforsorg* 50 (1948), 94.

39 Jungner (1948), 94.

40 Jungner (1948) 86; italics in the original.

41 SOU 1949:11. *Betänkande om sinnesslövärdar: 1946 års Sinnesslövärdsutredning*. Stockholm: SOU, 1949, 107.

42 SOU 1949:11, 127.

43 Stig Nordström, “En jämförande undersökning av externat- och internatundervisade särskoleelever,” *Psykisk utvecklingshämning* 64, no. 1–2 (1962), 33.

44 Nordström (1962), 33.

the “right education,” these “mentally retarded” young people could become “fully adapted to the social life of society, self-sustaining and without the need for special support.”<sup>45</sup> At the same time, he admitted that young people with such impairments needed employment in sheltered environments and, “in many cases,” placement in boarding homes. However, Wessman highlighted the significance of jobs: “Our pupils and patients become more harmonious if they do regular work, work that makes them feel useful and receive a wage for their effort.”<sup>46</sup> Similarly, the green paper preparing the Care Law of 1967/68 emphasised the objective that pupils should be “placed in the open market or sheltered occupation”<sup>47</sup> after graduating, and that an increasing focus on that field would be necessary. However, a state report on vocational training imposed strict limitations. A “placement in the normal department of an ordinary vocational school [...] appears unrealistic given the nature of the disability and should not occur.”<sup>48</sup> According to another green paper entitled *Bättre utbildning för handikappade* (“Better education for the handicapped”), courses, training, job measures and adaptations contributed to “eliminating the handicap.”<sup>49</sup> What becomes evident here is the compensatory approach that characterised the welfare measures of that period.

Another decade later, and the focus changed once again. For one thing, the emphasis was placed more clearly on the personal development of people with ID. On the other hand, the relationship between the individual and the restricting environment became a subject of discussion. A publication from the FUB parents’ organisation illustrates this change. This influential advocacy group emphasised the right to work and provided examples of personal development through employment. They suggested better teacher education and fruitful cooperation between regular and special schools. “Work in the regular labour market should always be the goal.”<sup>50</sup> Complex measures were therefore needed: adult education, workplace adaptations, appropriate work tasks, employer responsibility, occupational health services, and trade union commitment. Professionals also concluded that “vocational education increases opportunities for employment for the mentally handicapped.”<sup>51</sup>

In the years to come, FUB continued its lobbying, among other things, by publishing brochures on this issue.<sup>52</sup> In the preface of one of these publications, the FUB vice chair summed things up in easy language:

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45 Lars Wessman, “Rehabilitering: Diskussionsinlägg,” *Psykisk utvecklingshämning* 66, no. 2 (1964), 5.

46 Wessman (1964), 5.

47 SOU 1966:9. *Omsorger om psykiskt utvecklingshämmande: Betänkande av särskilt tillkallad utredningsman* (Stockholm: SOU, 1966), 81.

48 SOU 1966:3. *Yrkesutbildningsberedningen. Yrkesutbildningen. I* (Stockholm: SOU, 1966), 335.

49 SOU 1969:35. *Bättre utbildning för handikappade: Förslag av Handikapputredningen* (Stockholm: SOU, 1969), 90.

50 Riksförbundet FUB. *Utbildning och träning ... för vad? Om rätten till arbete, även för utvecklingsstörda!* (Stockholm: FUB, 1978), 23.

51 Berit Nordfors and Gösta Nordfors, “Vocational Education and Vocational Adjustment,” In *The Mentally Handicapped: Towards Normal Living*, ed. Karl Grunewald (London: Hutchinson of London, 1978), 199.

52 Riksförbundet FUB, ed. *Jobbet: en skrift om 17 arbetsplatser i Sverige* (Stockholm: FUB, 1989); Riksförbundet FUB, ed. *17 jobb: en idéskrift* (Stockholm: FUB, 1989).

Many of those who are handicapped are craving for a job in a workplace. [...] Handicapped people have shown that they can do many things. [...] This writing contains the stories of lucky people who have had the chance and know how it feels to be needed and valuable instead of just being employed.<sup>53</sup>

At the end of the researched period, however, it became clear that the objective of getting jobs in the open labour market had not yet been achieved. Meanwhile, research criticised special schools, not least for normalising the exclusion of young people with ID from the labour market.<sup>54</sup> It also became apparent that goodwill in the form of reform-oriented education and welfare was insufficient to create work opportunities.

### *Work – in the best interests of the individual and of society*

The objective of the Swedish welfare system for the entire period from 1945 to 1989 was to enable people with ID to work. There was an outspoken ambition that they could make their own living. Despite this continuity, some fundamental changes in motivation and social context exist. There was a continual alteration of the role of people with ID, from being objects of care towards self-determination over their lives. These changes were embedded in the reform-oriented social policy of the 1960s and 1970s. The context was the closure of boarding homes. For example, an article on the “Right to appropriate work and employment” suggested “getting as many out of the institutions as possible.”<sup>55</sup> Establishing “a society for all” became the objective, as the emerging disability movement and social administrators expressed it.<sup>56</sup>

At the beginning of the examined period, 2,245 places existed in working homes for the “feeble-minded.” These places were, whenever possible, separated by gender. About half of these homes were in public ownership, and the other half in private ownership. Contemporary social policy assumes that “many feeble-minded need to live in boarding homes throughout their lives.”<sup>57</sup> However, some of those people lived in controlled family care, often on farms. Economic incentives motivated this policy. Fewer places were needed in working homes, and “society gets the direct opportunity to take advantage of the working capability of the feeble-minded.”<sup>58</sup>

Working homes existed until the mid-1960s for other vulnerable groups, for example alcoholics and patients from mental hospitals. A green paper from the late 1940s criticised the lack of differentiation concerning the inmates. According to this report, work and occupation were an essential function in the field of intervention:

53 Gudrun Sandström, “Gå till Arbetsförmedlingen,” In *Jobbet: en skrift om 17 arbetsplatser i Sverige*, ed. Riksförbundet FUB (Stockholm: FUB, 1989), 4.

54 Jerry Rosenqvist, *Undervisning om arbete i särskolan. Analys av lektioner på grundskolans högstadium* (Malmö: Lärarhögskolan, 1989).

55 Gudrun Hädell, “Rätt till adekvat arbete och sysselsättning,” *Psykisk utvecklingshämning* 71, no. 4 (1969), 18.

56 Bengt-Olof Mattsson, “Utvecklingen i Sverige,” *Psykisk utvecklingshämning* 78, no. 2 (1976), 29.

57 SOU 1949:11, 135.

58 SOU 1949:11, 75.

However, occupational therapy is a necessary part of the treatment of all psychopathological clients. It can improve the clientele's mental health and well-being within certain limits and contribute to social adjustment.<sup>59</sup>

A considerable change had already occurred by the first half of the 1960s, with inspiration coming not least from abroad. In 1963, the professional journal *Psykisk utvecklingshämning* published articles from the Netherlands and England on modernised approaches to labour integration for people with ID.<sup>60</sup> A disability activist from the FUB parent organisation described work as a human right. The concept of normalisation – established first in Denmark and then in Sweden – viewed work as a “normal routine of the day.”<sup>61</sup>

The new approach became apparent, for example, in a green paper on coordinated rehabilitation. It emphasised that everybody should have the opportunity to “live in social and cultural community with others and to make productive efforts.”<sup>62</sup> The education of “some mentally retarded” people should be “increasingly directed towards temporal-oriented work of various kinds, in industry and elsewhere.”<sup>63</sup> Similarly, a decade later, psychologists Lars Kebbon and Cecilia Wändell saw opportunities for a “more independent life and productive efforts”<sup>64</sup> in society. The double motivation of personal development and societal advantages also exists in the reasoning of Rikard Palmer in his PhD thesis: “The mentally retarded person who can earn his livelihood gains respect in his own eyes and the eyes of others and also relieves society of considerable expense.”<sup>65</sup>

The reform-oriented social policy of the 1970s led to the establishment of the Employment Committee, which facilitated the implementation of *Arbete åt alla* (“Work for all”), as outlined in the green paper SOU 1975:90. The committee's comprehensive work led to numerous green papers, including SOU 1978:14 on *Arbete åt handikappade* (“Work for the Handicapped”).<sup>66</sup> The committee suggested subsidised wages as a response to the difficulties people with ID face in finding jobs on the open market.

The professional literature of the 1970s considered individual aspects, for example, personal interests and satisfaction. Based on individual assessment, a hierarchy of

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59 SOU 1949:11, 200.

60 For the Netherlands, see A. Meuzelaar, “Arbeidsmuligheter for de psykisk utviklingshemmede,” *Psykisk utvecklingshämning* 65, no. 3 (1963), 3–18; for England see H. C. Gunzburg, “Nye synspunkter på den sociale og arbejdsmessige oplæring og træning av psykisk utviklingshemmede,” *Psykisk utvecklingshämning* 65, no. 3 (1963), 19–40.

61 Bengt Nirje, “The Normalization Principle and Its Human Management Implications,” In *Changing Patterns in Residential Services for the Mentally Retarded*, ed. Robert B. Kugel and Wolf Wolfensberger (Washington, DC: President's committee on mental retardation, 1969), 182.

62 SOU 1964:50. *Samordnad rehabilitering. Del I: Remissyttrandet över och kommentarer till CRB:s PM 1962 med riktlinjer för den allmänna rehabiliteringsorganisationen* (Stockholm: SOU, 1964), 20.

63 SOU 1964:50, 153.

64 Kebbon and Wändell (1974), 9.

65 Rikard Palmer, *Prediction of Work Performance and Work Adjustment in Mentally Retarded Adults* (Uppsala: Scandinavian University Books, 1974), 1.

66 SOU 1975:90, *Arbete åt alla: Delbetänkande från Sysselsättningsutredningen* (Stockholm: SOU, 1975); SOU 1978:14, *Arbete åt handikappade: Betänkande av Sysselsättningsutredningen* (Stockholm: SOU, 1978).

solutions according to individual capabilities was favoured: open market, semi-protected, protected, or daily activity centre.<sup>67</sup> The aim was to pave the way for the “greatest possible social independence in a productive community”<sup>68</sup>, as expressed by educational practitioners Berit Nordfors and Gösta Nordfors. For the very first time, ID was associated with positive stereotypes – something that, in itself, may be understood as an indication of broader societal change:

Most mentally handicapped persons possess valuable qualities such as friendliness, carefulness, loyalty and willingness to work, which in many cases may wholly or partly compensate for their mental handicap.<sup>69</sup>

The authors proposed assistants and vocational advisers, suggesting that many people could work in the open labour market. However, Nordfors and Nordfors did not question the norm of social usefulness. They considered “mental handicap” to be an impairment that requires compensation.

### *The challenge of labour market changes*

Over the twentieth century, Sweden transitioned from an agricultural to an industrial and, ultimately, a service-based society. Developing work opportunities for people with ID reflected these fast and dynamic changes. Until the 1950s, employment opportunities in the agricultural sector were limited to simple manual work and household services. In particular, the working homes and boarding schools for the “feeble-minded” needed cheap labour, often recruited from their alumni. As long as a labour shortage existed, there were good opportunities to “place pupils in work under controlled conditions.”<sup>70</sup> Industrial work was considered too demanding, while agricultural work had a “therapeutic purpose.”<sup>71</sup>

Under the terms of industrialisation, “placement opportunities for the handicapped are nowadays very meagre.”<sup>72</sup> As adaptations in industry were seen as exceptionally appropriate, sheltered workshops and activity centres emerged. However, a crucial issue was the employees’ income. While some considered industrial work as a chance for fair wages, others were more vigilant and demanded a “normalisation of remuneration for the work performed.”<sup>73</sup>

Since the 1960s, the labour market has changed in terms of mechanisation, automation and specialisation. Better transport connections have made occupations away from home easier. In return, everyone should be seen as “distinctive in terms of assets,

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67 Stiftelsen ALA, *Habilitering av psykiskt utvecklingsstörda* (Stockholm: Natur och kultur, 1975), 66.

68 Nordfors and Nordfors (1978), 17.

69 Nordfors and Nordfors (1978), 197.

70 Börje Fridholm, “Redogörelse rörande elever avgångna från statens uppfostringsanstalt Salbohed under åren 1923–1949,” *Nordisk tidskrift för Åndssvageförsorg* 54 (1952), 55.

71 Stig Ekelund, “Sysselsättning vid vårdanstalterna – ett diskussionsinlägg,” *Psykisk utvecklingshämning* 65, no. 4 (1963), 61.

72 Wessman, 1964, 6.

73 Karl Grunewald, “Normaliseringsprincipen och omsorgerna om de utvecklingshämmade,” *Psykisk utvecklingshämning* 74, no. 2 (1972), 45.

wishes, interests and conditions,”<sup>74</sup> as a green paper on the education of people with disability suggested.

Towards the end of the 1970s, however, optimism gave way to a more sober evaluation. The FUB parents’ organisation bemoaned hindrances, for example rejecting societal attitudes, employers’ prejudices, rationalisations, and performance pressure. According to this group, increasing job opportunities in public services did not lead to more jobs for people with ID. Employment opportunities for this specific group could not keep pace with the transformation of the world of work. FUB applied neoliberal reasoning: “Employment protection protects those who have a job but does not increase the propensity to employ.”<sup>75</sup> Moreover, people with ID would avoid contact with employment services. The FUB named workplace adaptations, support measures and job counselling as possible areas for improvement. In their statement, the latter concept of supported employment is already casting its shadow.

### *The tradition of follow-up studies*

For the entire researched period, and with roots in the first half of the twentieth century, professionals have been interested in the outcomes of education, particularly employment status, housing conditions and civil status. Such examinations partly functioned to evaluate educational efforts and partly to justify specific policies. The boundary between these approaches is often challenging to identify. In view of the varying research methods, a comparison over time is scarcely possible. Irrespective of this limitation, these studies reveal the specific objectives of education and care.

At the beginning of the examined period, *Skolöverstyrelsen*, the central school administration, analysed statistical data from almost 1,800 pupil records from all over Sweden.<sup>76</sup> The investigation covered pupils who attended special schools for the “feeble-minded” between 1936 and 1946. About one third of the alumni were autonomous, with their own income; one third were partially self-sustaining; and the remaining third depended on support. It became evident that young men had better employment opportunities than women, resulting in better income. Generally, young people who lived in their parents’ homes performed better than those from boarding schools. Subsequently, the scarce scholarly literature in the field received this study positively.<sup>77</sup> A regional study in a south-eastern Swedish province yielded similar results regarding employment status and the gender gap.<sup>78</sup>

State inspector Lennart Wessman conducted another comprehensive study some years later, focusing on alumni from special schools for the “feeble-minded” born between 1935 and 1939. The empirical material was based on almost 2,000 questionnaires. About half of the young men and a quarter of the young women were self-suf-

74 SOU 1969:35, 88.

75 FUB (1978), 7.

76 Ragnhild Jungner, “Vad blir det av våra barn?” in *Förhandlingar vid femtonde allmänna svenskassistentlövsårsmötet i Göteborg 3–7 augusti 1950* (Uddevalla: Allmänna svenska föreningen för vården om sinnesslöa och fallandesjuka, 1952), 37–59.

77 Hans Forssman and Ingemar Olow, *De psykiskt utvecklingsstörda, deras utbildning och vård*, 2<sup>nd</sup> ed. (Stockholm: Läromedelsförlagen, Svenska bokförlaget, 1961), 80.

78 Lina Ribbing, “Särskolevers arbetsanpassning – en efterundersökning,” *Psykisk utvecklingshämning* 65, no. 1 (1963), 15–22.

ficient. Wessman concluded that the alumni “still have a low standard of living in our country.”<sup>79</sup> The clear ambition was to improve this situation.

Several authors quoted Wessman’s study in the following years or referred to other, often small-scale and locally limited, research.<sup>80</sup> The results were similar: specific percentages of the alumni had a job, either partly on the open market, or partly in a sheltered or semi-sheltered environment. Some others were without any occupation. Even the gender gap, which indicated better job opportunities for men than for women, persisted over time. Another study on three cohorts of “mental retarded” alumni, born between 1944 and 1946 in Stockholm, revealed that one fifth had a job on the open market, almost one fourth were in a sheltered workshop, one fourth were in occupational therapy, and the others were not in employment, had died or been released from the care register.<sup>81</sup>

The last sizeable empirical follow-up study in the researched period focused on one province in central Sweden, examining the situation of 255 alumni who left special schools between 1975 and 1985.<sup>82</sup> According to the author, the data indicated a decreasing number of young people with ID who could get jobs in the open labour market. Moreover, fewer young people were without any occupation.

At the end of the period, in the late 1980s, experts and researchers estimated that only around 10–17 per cent of former pupils from special schools secured jobs on the open market.<sup>83</sup> Employment in the labour market is an exception acknowledged in professional literature.<sup>84</sup> Many alumni remain dependent on occupations in activity centres and on social support. They are marginalised in many ways, not least concerning their status in the labour market. A striking result is the continuity of the disadvantaged position of women with ID, mirroring intersectional marginalisation based on gender and cognitive deviance.

### *Sheltered workshops – the institutional response of industrial society*

When Sweden developed into an industrial society in the mid-twentieth century, work opportunities for people with ID changed significantly. The working homes, which focused on agriculture and handicrafts, closed in the 1960s without any documented resistance. Instead, sheltered workshops emerged. Green papers from the mid-1960s

79 Lars Wessman, “Efterundersökning av särskolelever,” *Psykisk utvecklingshämning* 66, no. 4 (1965), 19.

80 See Lars Kebbon, “Vilka skrivs ut från sjukhus för utvecklingshämmande?” *Psykisk utvecklingshämning* 71, no. 4 (1969), 31–36; Anna-Liss Åkesson, “Uppföljning av elever som genomgått särskolan,” *Psykisk utvecklingshämning* 72, no. 4 (1970), 53–60; Inga Sommarström, “Efterundersökning av elever i folkhögskolekurs,” *Psykisk utvecklingshämning* 72, no. 1 (1970), 16–23; Nordfors and Nordfors (1978); Riksförbundet FUB, *Utbildning och träning ... för vad? Om rätten till arbete, även för utvecklingsstörda!* (Stockholm: FUB, 1978).

81 Gunnar Klackenbergh, “Vart tar de vägen?” *Psykisk utvecklingshämning* 71, no. 3 (1969), 12–21.

82 Karin Sonnander, *Ungdomar med särskolebakgrund: En uppföljning av tio årskullar med avseende på arbete och sysselsättning* (Uppsala: Projekt Mental retardation, Institutionen för psykiatri, Ulleråkers sjukhus, 1990).

83 Karl Grunewald, “Sverige,” *Psykisk utvecklingshämning* 89, no. 3 (1987), 41; Jerry Rosenqvist, *Särskolan i ett arbetsmarknadsperspektiv: om lärares och handledares uppfattningar av arbete och elevernas framtid i arbetslivet* (Stockholm: Almqvist & Wiksell, 1988), 55.

84 Åsa Eriksson-Ahnfelt, “Jobb i stallet,” *Psykisk utvecklingshämning* 89, no. 3 (1987), 24–28.

and early 1970s strongly emphasised the need to create employment opportunities for people with ID.<sup>85</sup> In 1964, the FUB established the foundation *Anpassning till Liv och Arbete* (ALA, Adaptation to Life and Work) and initiated a sheltered workshop in Uppsala in 1967. In the same year, 34 new institutions had popped up all over Sweden.<sup>86</sup> Accompanying research, mainly focusing on work psychology and organisational aspects, aimed to optimise employment conditions.<sup>87</sup> For the first time, issues regarding an adapted work environment and the well-being of workers were raised.

According to Wessman, sheltered workshops were an alternative to employment on the open market, mainly for “mentally retarded” people who “for some reason, often lacking the capacity for social adaptation, cannot be placed within our complicated social machinery.”<sup>88</sup> As professional literature shows, a broad consensus existed on the meaningfulness of sheltered workshops in the 1960s and 1970s.<sup>89</sup>

Conceptually, these new institutions were closely linked to the idea of normalisation. The functional separation between living and working was a crucial aspect. Consequently, industrial areas were the place for sheltered workshops. They were “distinctive institutions that stand between traditional healthcare institutions and general, productive companies.”<sup>90</sup> The aim was to facilitate the transition from sheltered employment to the open labour market.<sup>91</sup> In contrast, as another new institution type, the daily activity centres were conceptualised with a more distinctive therapeutic approach, offering occupations to their clients.<sup>92</sup>

Regardless of the objective of encouraging transfer into the regular labour market, most employees remained in the sheltered workshops. In 1980, the system of sheltered workshops was centralised into a foundation (*Samhällsföretag*) and regional offices in every Swedish province.<sup>93</sup> Later, in 1992, this foundation became a corporate group, but the sheltered workshops have closed in recent decades. The phase of industrial

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85 SOU 1964:51, *Samordnad rehabilitering. Del II: Allmänna principer och vissa organisationsförslag. Betänkande av Centrala Rehabiliteringsberedningen* (Stockholm: SOU, 1964); SOU 1965:9, *Arbetsmarknadspolitik: Betänkande avgivet av 1960 års Arbetsmarknadsutredning* (Stockholm: SOU, 1965); SOU 1972:54, *Skyddat arbete: Betänkande avgivet av Utredningen rörande den skyddade sysselsättningen* (Stockholm: SOU, 1972).

86 Rikard Palmer, “Arbetsprövning av utvecklingshämmede,” *Psykisk utvecklingshämning* 73, no. 2 (1971), 35.

87 Examples of such research are Anders Ch. Gogstad, “Personaluppsättning och personalsamverkan på skyddad verkstad,” *Psykisk utvecklingshämning* 70, no. 4 (1968); Rikard Palmer, “Skyddade verkstäder för psykiskt utvecklingshämmede,” *Psykisk utvecklingshämning. Supplementum* 2 (1968); Palmer (1974).

88 Wessman (1964), 9.

89 This can be exemplified by referring to Nils Håkansson, “Referat II Från Ronneby-symposiet om skyddade verkstäder okt. 1968,” *Psykisk utvecklingshämning* 71, no. 1 (1969); Horst Norrlund, “Arbete åt utvecklingsstörda,” *Psykisk utvecklingshämning* 71, no. 3 (1969); Lars Weckroth, “Referat III Från Ronneby-symposiet om skyddade verkstäder okt. 1968,” *Psykisk utvecklingshämning* 71, no. 1 (1969).

90 Gogstad (1968), 39.

91 Weckroth (1969), 32.

92 Jan Hjärpe, *Normaliseringens kvalitet: förutsättningar och utnyttjandegrad inom tre livsområden för utvecklingsstörda: boende, fritid och daglig verksamhet* (Uppsala: Projekt Mental retardation, Ulleråkers sjukhus, 1984).

93 Socialstyrelsen, *Från dagcenter till arbete: psykiskt utvecklingsstördas möjligheter till arbete och sysselsättning* (Stockholm: Socialstyrelsen, 1984), 13.

work for people with ID within this specific organisational form was very short-lived, yet alternatives were not sufficiently developed. The general labour market was not adequately prepared for a group of individuals unable to meet societal norms. It appears that little has changed to this day.

## Discussion

The historical development of employment opportunities for people with ID followed, until the shift between the 1950s and the early 1960s, a guarding and patronising tradition, as previous research has highlighted for the interwar, war and post-war periods.<sup>94</sup> In the 1960s and 1970s, a solid commitment to social reforms became visible, including employment and work for people with ID. The principal innovation of this period was the establishment of sheltered workshops, which – consistent with international research<sup>95</sup> – reveals clear parallels, particularly with developments in Anglophone countries. The industrialisation of the open labour market was reflected in these new institutions, although this phase ultimately proved relatively short-lived. In line with previous Scandinavian research,<sup>96</sup> the significance of normalisation concepts cannot be underestimated. Finally, the 1980s were characterised by some disenchantment, as awareness grew that the pursued integration into the open labour market had not yet been fulfilled. These problems exist even today.<sup>97</sup>

This research highlights the significance of work based on policy papers, professional publications, and the FUB advocacy group. Therefore, some limitations concerning the scope of this study are inevitable. For future research, an in-depth analysis of curriculum reforms and archival research, such as regional studies based on materials from FUB, could contribute to expanding the historical perspective on work for a vulnerable group. However, based on the results of this study and on theoretical approaches, some tendencies are emerging.

### *Continuity and change in the purpose of education*

As outlined above, Biesta distinguishes between three education functions, or domains: qualification, socialisation, and subjectification.<sup>98</sup> It is striking that qualification was scarcely a topic in the professional debate. Although work integration has been a critical issue, contemporary professionals have neglected to discuss aspects of knowledge, skills and understanding related to education for pupils with ID. Notwithstanding several curricular reforms, these questions have never been at the centre of the debate. This phenomenon highlights the low value placed on qualifications in special schools. It appears that traditional aspects of care have been more highly valued than qualification.

In contrast, the socialisation of pupils was a significant issue. During the entire period from 1945 to 1989, there was an ambition to support the transition to work life, albeit with a shifting focus. The social control and usefulness of people categorised as

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94 For example, Areschoug (2000); Barow (2009); Barow (2011); Broberg and Tydén (2005); Engwall (2000).

95 See Conrad (2020); Kilgannon (2023).

96 Tøssebro et al. (2012).

97 Arvidsson (2016); Taubner and Luthra (2024).

98 Biesta (2009); Biesta (2020).

“feeble-minded” was the focus from the 1940s to the 1960s. However, the desirable adaptation of the individual to societal norms can be traced back to the 1970s. Only slowly did a critical perspective emerge, questioning this compensatory perspective and focusing on the relationship between the individual and the social environment.

The gradual pushback of the socialisation domain paved the way for a more substantial impact from subjectification. Although the education of “happy people”<sup>99</sup> was an objective at the beginning of the period, aspects of personal development, satisfaction and well-being emerged and were enhanced from the 1970s onwards. However, the domain of subjectification did not exist in a pure form. It was often combined with socialisation, underlying existing educational ambivalences.

### *Employability and social usefulness through an ableism lens*

The objective of social integration through work was widely accepted throughout the researched period. This view has been firmly rooted in Swedish society since the emergence of poor relief in the mid-nineteenth century, as highlighted by previous research on work and disability.<sup>100</sup> This study reveals the remarkable resilience of this attitude. Becoming economically advantageous played a crucial role in the education and care system. At the same time, securing and maintaining a job was a sign of adulthood. The ideology that everyone must be useful in society appears to be remarkably robust, lasting for many decades and continuing to this day. From an ableism perspective, this is highly problematic because societal norms can lead to the exclusion of people who cannot or do not want to fulfil these expectations.<sup>101</sup>

However, there have been changes over time. For the first few decades of the researched period, until the early 1960s, paternalism was characterised by the denial of self-determination and disciplinary measures.<sup>102</sup> The objective of adapting to the norms of society was outspoken, even into the 1970s, and sometimes combined to reduce social relief costs and to “eliminate”<sup>103</sup> or to “compensate for their mental handicap.”<sup>104</sup> During that time, more subtle forms of ableism occurred, attributed to people with ID having positive qualities such as “friendliness, carefulness, loyalty and willingness to work.”<sup>105</sup> There are qualitative differences between these forms of ableism; however, even benevolent ableism is problematic because it neglects individual personality and hinders personal development. This article therefore underscores the long road left to travel towards genuine social inclusion; one that is not solely based on equal performance but on the universal equal rights of all individuals.

### *Transformation and stability of Swedish society*

The structural changes in the Swedish economy – from an agrarian to an industrial, and then a service-based society – found their counterpart in the employment oppor-

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99 Jungner (1948), 86.

100 Förhammar (1991); Bengtsson (2023).

101 Goodley (2014); Stafford (2020).

102 Engwall (2000); Grunewald (2008).

103 SOU 1969:35, 90.

104 Nordfors and Nordfors (1978), 197.

105 Nordfors and Nordfors (1978), 197.

tunities for people with ID. The idea of working in the agricultural sector disappeared with progressive industrialisation. The societal response of the 1960s was the emergence of sheltered workshops. The FUB’s early observation that the increase in working opportunities in public services did not result in more jobs for people with ID is highly relevant even today.<sup>106</sup> An adjustment relying solely on labour market mechanisms appears unfeasible. Instead, targeted interventions are required, for example, within the framework of supported employment. In this context, considering national, regional and local labour markets seems crucial for creating jobs.

Several follow-up studies from the researched period and studies conducted today reveal a robust gender gap in work opportunities.<sup>107</sup> With a background in special schools for pupils with ID, research indicates that young men have better chances than young women of entering the labour market. This aspect merits deeper consideration for the future planning of education and employment opportunities for a marginalised group of young people.

To conclude, the development of working opportunities for people with ID between 1945 and 1989 exemplifies the transformation of the Swedish welfare state. Even though society has undergone considerable changes, pursuing social usefulness is a constant goal. People with ID have always been – and are still today – at risk of exclusion from the general labour market. Comprehensive education and social welfare system reforms must be pursued over the long term to ensure equal participation for all, regardless of the individual’s economically measurable work capacity.

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106 Riksförbundet FUB (1978); for today’s situation see Arvidsson (2016) and Taubner and Luthra (2024).

107 Jungner (1952); Ribbing (1963); Wessman (1965); Arvidsson (2016).

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## From Segregation to Inclusion: Special Needs Education and the Transformation of the Swiss Welfare State

Michèle Hofmann & Lukas Boser

**Abstract** • This article examines the evolution of special needs education in Switzerland, focusing on the transition from segregation to inclusion within the context of welfare state formation. The authors hypothesise that both segregated and inclusive education systems are inextricably linked to the logic of the Swiss welfare state, which aims to integrate individuals into society while reducing the financial burden on the state. Historical analysis reveals that, from the end of the nineteenth century, early welfare measures, driven by statistical thinking and medico-educational classifications, led to the establishment of special educational facilities for “abnormal” children. In the twentieth century, it became apparent that educational segregation led to social separation, not integration. However, despite the political commitment to the new paradigm of inclusive education, its practical implementation remains challenging, with significant variations among Swiss cantons and ongoing debates about resource allocation and meritocracy.

**Keywords** • special needs education, social inclusion, welfare state, Switzerland

In recent decades, social inclusion in all life domains – education in particular – has become a prominent political issue.<sup>1</sup> Accordingly, it has received much attention in international educational discourse as well as in educational research.<sup>2</sup> Proponents of inclusive education see the exclusion of children from mainstream education as a social injustice that prevents society from being more just, fair, and equal. Inclusive education is thus meant to right the historical injustice of separating the so-called disabled children from their so-called normal peers. Although the inclusion narrative emphasises equal access to education for every child – regardless of their dis/ability – with the view of allowing each individual to become a useful and productive citizen, the practical implementation of inclusive measures remains challenging. As Tobias Colling Larsen and his co-authors pointed out, “there has been a great discrepancy between inclusion as a political ideal and inclusion as practice.”<sup>3</sup>

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1 Tobias Peter and Anne Waldschmidt called inclusion a “central concept in contemporary discourse” (*Leitbegriff der Gegenwart*). See Tobias Peter and Anne Waldschmidt, “Inklusion: Genealogie und Dispositivanalyse eines Leitbegriffs der Gegenwart,” *Sport und Gesellschaft* 14, no. 1 (2017), 29–52.

2 For a global view on the issue of inclusion in education, see Christopher Boyle et al., eds., *Inclusive Education: Global Issues and Controversies* (Leiden: Brill Sense, 2020).

3 Tobias Colling Larsen, Jessica Holloway, and Bjørn Hamre, “How is an Inclusive Agenda Possible in an Excluding Education System? Revisiting the Danish Dilemma,” *International Journal of Inclusive Education* 23, no. 10 (2019), 1049. For the specific case of Switzerland see for instance Inclusion Handicap, *Schattenbericht: Bericht der Zivilgesellschaft anlässlich des ersten Staatsberichtsverfahren vor dem UN-Ausschuss für die Rechte von Menschen mit Behinderungen* (Bern: n.p., 2017).

In Switzerland, the school system has become more inclusive over the last few decades, albeit slowly and with significant cantonal variations.<sup>4</sup> Like many other countries, Switzerland is a signatory to the Salamanca Statement on Principles, Policies, and Practice in Special Needs Education of 1994, thereby implicitly adhering to the perspective that children “with special education needs must have access to regular schools which should accommodate them within a child-centred pedagogy capable of meeting these needs,” which is best achieved in a fully inclusive school system.<sup>5</sup> Switzerland also ratified the UN Convention on the Rights of Persons with Disabilities of 2006,<sup>6</sup> the aim of which – among many other objectives – is to ensure that persons with disabilities can effectively participate in a free society. To uphold this directive, the ratifying states “shall ensure an inclusive education system at all levels.”<sup>7</sup> Adherence to this philosophy is reflected in the paragraph added to the Swiss Federal Constitution in 2008, stipulating that the Swiss cantons shall provide sufficient special needs education for all children with disabilities.<sup>8</sup> More conducive guidance is given by the Federal Act on the Elimination of Discrimination against People with Disabilities (*Behindertengleichstellungsgesetz*), stating that the cantons should promote the inclusion of children with disabilities into mainstream schools.<sup>9</sup>

Compared to the Nordic countries, Switzerland is a latecomer to inclusive education. Nevertheless, the Swiss school system provides an effective case study for elucidating the dramatic change in the treatment of pupils with special needs in the welfare-state era.<sup>10</sup> During this period, “the management of children with cognitive and physical disabilities underwent radical transformations.” At the turn of the twentieth century, children with disabilities “were tested and assessed and placed in special schools or special classes.” In the second half of the century, “the official policies concerning

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4 Justin Powell and Andreas Hadjar, “Schulische Inklusion in Deutschland, in Luxemburg und der Schweiz: Aktuelle Bedingungen und Herausforderungen,” in *Leistung und Wohlbefinden in der Schule: Herausforderung Inklusion*, ed. Kathrin Rathmann and Klaus Hurrelmann (Weinheim: Beltz Juventa, 2018), 46–64. See also Bundesamt für Statistik, *Statistik der Sonderpädagogik: Schuljahr 2018/2019* (Bern: Bundesamt für Statistik, 2022).

5 UNESCO, *Salamanca Statement on Principles, Policies, and Practice in Special Needs Education* (Salamanca: UNESCO, 1994), viii.

6 Switzerland ratified this convention in 2013.

7 United Nations, *Convention on the Rights of People with Disabilities and Optional Protocol* (New York: United Nations, 2006), 16.

8 [https://www.fedlex.admin.ch/eli/cc/1999/404/en#art\\_62](https://www.fedlex.admin.ch/eli/cc/1999/404/en#art_62). The paragraph does not specify in which schools this education shall be provided.

9 [https://www.fedlex.admin.ch/eli/cc/2003/667/en#sec\\_5](https://www.fedlex.admin.ch/eli/cc/2003/667/en#sec_5). See also Niels Anderegg, “Auf die Schulleitung kommt es an!,” in *Ist inklusive Schule möglich? Nationale und internationale Perspektiven*, ed. Jasmin Donlic, Elisabeth Jaksche-Hoffman, and Hans Karl Peterlini (Bielefeld: transcript, 2019), 111–32; Urs Strasser, “Eine Schule für alle: Integration und Inklusion auch in der Schweiz? Eine Standortbestimmung,” *Schweizerische Zeitschrift für Heilpädagogik* 3, no. 3 (2006), 6.

10 For the organisation and structure of the Swiss school system see Lukas Boser, Michèle Hofmann, and Ingrid Brühwiler, “E Pluribus Unum: One Swiss School System Based on Many Cantonal School Acts,” in *School Acts and the Rise of Mass Schooling: Education Policy in the Long Nineteenth Century*, ed. Johannes Westberg, Lukas Boser, and Ingrid Brühwiler (Cham: Palgrave Macmillan, 2019), 67–92.

disabled children and youth moved towards integration and inclusion,” and “[e]qual access to education became the overall goal.”<sup>11</sup>

The existing research literature on the history of educational exclusion and inclusion in the Nordic countries has traced this transformation from the mid-twentieth century. We learn from these studies that the segregated school system, which had developed extensively by the middle of the century, fell into disrepute as a part of the general social critique in the 1960s. The aim was to replace the exclusionary school system with an inclusive one.<sup>12</sup> We also learn from existing research that inclusive education became associated with the idea of the welfare state and with “notions of equality, equity and democracy.”<sup>13</sup>

It is the link between special needs education and welfare state formation that we find intriguing and want to explore in more historical detail in our article. Taking Switzerland as an example, we hypothesise that, just as inclusive education can be attributed to the modern (i.e. post-World War II) welfare state, the preceding paradigm of segregated education was closely linked to the early (i.e. late nineteenth and early twentieth century) welfare state and its logic. We will argue that segregated education – the system the modern Swiss welfare state (*Sozialstaat*)<sup>14</sup> intended to remedy – was introduced by what we call the early welfare state.

Our analysis begins in the late nineteenth century when children considered to be intellectually “abnormal” were identified and labelled as “idiots” in order to subject them to welfare state measures. The source material on which our case study is based was produced in the context of the statistical recording and categorisation of “idiotic” children for the purpose of allocating them to special education facilities. We use the history of knowledge as a theoretical lens to interpret and analyse these sources to answer the question of how, in the early stages of the Swiss welfare state, knowledge gained by applying mathematics, statistics, and medicine influenced the creation of a segregated school system, where children with disabilities were separated from their “normal” peers.<sup>15</sup>

11 Call for Papers “Exploring the History of Disabled Pupils in the Welfare State” (Special Issue of the *Nordic Journal of the History of Education*).

12 See, e.g., Bjørn F. Hamre, “Inclusion and the Management of Diversity in the Danish Welfare State,” in *Who’s In? Who’s Out? What to Do about Inclusive Education*, ed. Marnie Best, Tim Corcoran, and Roger Slee (Leiden: Brill Sense, 2018), 33–46; Peter Haug, “Words Without Deeds: Between Special Schools and Inclusive Education in Norway,” *Pedagogy, Culture & Society* 8, no. 3 (2000), 291–303; Rune Sarrmaa Hausstätter and Markku Jahnukainen, “From Integration to Inclusion and the Role of Special Education,” in *Inclusive Education Twenty Years After Salamanca*, ed. Florian Kiuppis and Rune Sarrmaa Hausstätter (New York: Peter Lang, 2014), 119–31.

13 Larsen, Holloway, and Hamre (2019), 1049. See also Anne-Lise Arnesen and Lisbeth Lundahl, “Still Social and Democratic? Inclusive Education Policies in the Nordic Welfare States,” *Scandinavian Journal of Educational Research* 50, no. 3 (2006), 285–300.

14 In German-speaking regions, the literal translation of the term “welfare state” (*Wohlfahrtsstaat*) has a pejorative connotation. See Bernhard Degen, “Sozialstaat,” *Historisches Lexikon der Schweiz* 2013, <https://hls-dhs-dss.ch/de/articles/009932/2013-01-08> (accessed April 15, 2025). The idea of a welfare state, as we know it from the Nordic countries, is better captured by the word *Sozialstaat*, which literally translates to “social state.” In this article, the latter translation is adopted.

15 See Martin Lengwiler, “Expertise als Vertrauenstechnologie: Wissenschaft, Politik und die Konstitution der Sozialversicherungen (1880–1914),” in *Von der Barmherzigkeit zur Sozialversicherung: Umbrüche und Kontinuitäten vom Spätmittelalter bis zum 20. Jahrhundert*, ed. Hans-Jörg Gilomen, Sébastien Guex, and Brigitte Studer (Zürich: Chronos, 2002), 260.

We proceed in five steps. First, we provide an overview of the historical context in which the first welfare-state measures emerged in late nineteenth century Switzerland. Second, we focus on the arguments put forward by a late nineteenth century proponent for the establishment of a segregated school system. Third, we elaborate on how “abnormal” children were statistically recorded and categorised in order to assign them to special educational measures in the late nineteenth and early twentieth centuries. Fourth, we leap forward in time and discuss the transformation from a segregated to a more inclusive school system in Switzerland that took place in the late twentieth and early twenty-first centuries. In the fifth and final section, we revisit our hypothesis that inclusive and segregated education are both closely linked to the Swiss welfare state and its logic.

### The dawn and early dusk of the liberal-democratic Swiss welfare state

The Swiss welfare state can be considered a latecomer when compared to Germany, France, or the Nordic countries.<sup>16</sup> According to Swiss historian Bernard Degen, a Swiss welfare state in the true sense of the word did not exist until the second half of the twentieth century.<sup>17</sup> Its relatively late establishment is attributed to the previous absence of the key pillars of a welfare state, such as compulsory health insurance, a tax-funded old-age pension system, or public unemployment insurance.<sup>18</sup> Moreover, while in other welfare-state countries, most or all of these pillars are provided by a single entity (the state), in Switzerland, the federal state, the cantons, and charitable organisations share these tasks. However, Switzerland has not always lagged behind other countries in adopting social-security and welfare-state measures. In fact, at the end of the nineteenth century, Switzerland was a “pioneer” in Europe when it came to the protection of workers (including child workers).<sup>19</sup> Other measures, which a welfare state is supposed to provide – public transport, health insurance, old-age and survivors’ pensions, and public education – were also either introduced or discussed between the 1870s and the 1900s, a time period during which the Liberal Democratic Party ruled almost supreme over the federal state. Although, with regard to voter support, the Social Democratic Party has been a political force to reckon with throughout the twentieth century, it never became the ruling party. Thus, for a long time, the Swiss welfare state was based on a liberal instead of a social democratic framework.<sup>20</sup>

In 1874, the new constitution provided the federal state with the right to pass laws regarding industrial safety.<sup>21</sup> The federal administration acted upon this right by passing federal regulations of industrial factories (the so-called *Fabrikgesetz*) in 1877, which, among other provisions, restricted child labour in industrial production.<sup>22</sup> The *Fabrik-*

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16 Herbert Obinger et al., *Transformations of the Welfare State: Small States, Big Lessons* (Oxford: Oxford University Press, 2010), 193–94.

17 Degen (2013).

18 Ibid.

19 Obinger et al. (2010), 193.

20 Ibid., 191.

21 Brigitte Studer, “Arbeiterschutz,” *Historisches Lexikon der Schweiz* 2016, <https://hls-dhs-dss.ch/de/articles/016583/2016-03-31> (accessed April 15, 2025).

22 Brigitte Studer, “Fabrikgesetze,” *Historisches Lexikon der Schweiz* 2021, <https://hls-dhs-dss.ch/de/articles/013804/2021-08-06> (accessed April 15, 2025).

*gesetz* and other legislation restricting children's work in factories in the nineteenth century are considered the first child-protection measures.<sup>23</sup>

The new federal constitution also stipulated that elementary schools should be state-run and provide "sufficient" education.<sup>24</sup> It is noteworthy that "state-run" did not refer to the Swiss federal state, but to its member states, the cantons, meaning that elementary education in Switzerland was the sole responsibility of the cantons. Although the regulations set by the 1874 constitution were by no means revolutionary, most Swiss cantons had state-run, compulsory school systems in place well before 1874.<sup>25</sup> The authority of the federal constitution underscored the importance of the principle that the state – not the church or private institutions – had to provide sufficient education. The other important principle conveyed by the 1874 constitution was the compulsory provision of elementary schooling for all children, meaning that no one could or should be excluded from public education. Accordingly, while an obligation to provide elementary education for all was assumed by the cantons, it became a fundamental right for children throughout Switzerland.

In 1890, the federal government amended the constitution with a new section mandating that the federal state introduce insurance covering both illness and injury (the so-called *Kranken- und Unfallversicherungsgesetz*).<sup>26</sup> In the same year, the federal administration hired an actuary named Christian Moser (1861–1935), a specialist in insurance mathematics.<sup>27</sup> Moser was a member of a committee tasked with drafting a law that would establish national health and accident insurance.<sup>28</sup> The commission consisted of forty-two men, including another mathematician by the name of Hermann Kinkelin (1832–1913), who had made his academic career at the University of Basel, where he taught various subfields of mathematics, including statistics and actuarial mathematics.<sup>29</sup> Kinkelin, however, was not just an insurance mathematics and statistics expert, he also pursued a career in politics. He was a member of the Education Council (*Erziehungsrat*) in Basel, and in 1890 he began what would become a ten-year Swiss National Council membership. The committee was chaired by another National Council member, Ludwig Forrer (1854–1921). Forrer was not a trained scientist or mathematician, but rather a lawyer. Still, he had a keen interest in these matters and took private lessons in mathematics, trigonometry, and algebra from Kinkelin. The committee proposed a draft law, the so-called *Lex Forrer*,<sup>30</sup> which for various reasons

23 Meike Sophia Baader, "Die Kindheit der sozialen Bewegungen," in *Kindheiten in der Moderne: Eine Geschichte der Sorge*, ed. Meike S. Baader, Florian Eßer, and Wolfgang Schröer (Frankfurt am Main: Campus, 2014), 162.

24 See Lucien Criblez and Christina Huber, "Der Bildungsartikel in der Bundesverfassung von 1874 und die Diskussion über den eidgenössischen 'Schulvogt,'" in *Bildungsraum Schweiz: Historische Entwicklung und aktuelle Herausforderung*, ed. Lucien Criblez (Bern: Haupt, 2008), 87–129; Boser, Hofmann, and Brühwiler (2019), 67–92.

25 Boser, Hofmann, and Brühwiler (2019), 79.

26 Bernard Degen, "Entstehung und Entwicklung des schweizerischen Sozialstaates," in *Geschichte der Sozialversicherungen*, ed. Schweizerisches Bundesarchiv (Zürich: Chronos, 2006), 25.

27 Josef Kupper, "Versicherungsmathematik und schweizerische Hochschulen," *Mitteilungen der Schweizerischen Aktuarvereinigung* 98, no. 1 (1998), 41–42.

28 See Lengwiler (2002), 263–66.

29 Kupper (1998), 39.

30 Lengwiler (2002), 263–66.

failed to garner the approval of the Swiss people. Following an unsuccessful public vote on its adoption in 1900, the implementation of further social-security measures in Switzerland stalled. It would take a full century before the welfare-state measures discussed during this period were finally introduced.<sup>31</sup>

Although the *avant-garde* days of the Swiss welfare state were over at the turn of the twentieth century, those in philanthropic and political circles remained ardent advocates for state support when it came to education. The belief in scientific, statistical, and actuarial knowledge as the grounds for rational decision-making and better governing persisted, as we will show in the following sections of this article. This perspective traced its roots to the Enlightenment period and became known as “political arithmetic.” In the *Encyclopédie* by Diderot and D’Alembert, Denis Diderot provided support for this concept, positing that “the political world, just like the physical world, in many respects may be regulated by weights, number and measure.”<sup>32</sup> But Diderot also recognised that the mathematical tools required to meet these objectives had not yet been developed. This changed in the following decades. By the end of the nineteenth century, the idea of data-driven government became a reality, not least thanks to men like Moser and Kinkelin, as we will show in the next section when discussing how the state was called to action regarding children with special educational needs.

### The call for special education for the “imbecile” and the “feeble-minded”

In 1889, Pastor Adolf Ritter (1850–1906), a man with a keen interest in the religio-moral wellbeing as well as the social welfare of his parishioners,<sup>33</sup> gave the opening address to the first Swiss Conference on Idiocy in Zurich.<sup>34</sup> In his speech, Ritter argued that statistical data would show a severe lack of care for “idiotic” children in Switzerland. At the time, there were only six small institutions in the entire country providing education and care for roughly 180 “imbecile” children. In addition, a few special school classes catered to “feeble-minded” children. Ritter explained that this was inadequate, given “that on average for every 200 normally gifted children there is at least one stupid or imbecile or 2–4 feeble-minded children.”<sup>35</sup> By extrapolating those

31 Obinger et al. (2010), 232. Unemployment insurance became compulsory in 1982, health insurance in 1994, and federal guidelines for family allowances were introduced in 2006. Matthieu Leimgruber, *Solidarity without the State? Business and the Shaping of the Swiss Welfare State, 1890–2000* (Cambridge: University of Cambridge Press, 2008), 5. Thus, we can say that the Swiss welfare state entered a second phase about a century after introducing welfare-state measures as a part of phase one. This second phase, however, did not radically transform Switzerland into a full-fledged welfare state. The current Swiss welfare scheme still has important gaps and omissions as Obinger et al. explain in *Transformations of the Welfare State*: “[f]or example with regard to childcare facilities, paternal leave schemes, sick pay insurance, long-term care insurance, and coverage of dental treatments,” 232.

32 Denis Diderot, “Political Arithmetic (1751),” in *The Encyclopedia of Diderot and d’Alembert Collaborative Translation Project*, trans. Matthew D’Auria (Ann Arbor: University of Michigan Library, 2008), 678.

33 D.V., “† Kirchenrat Adolf Ritter,” *Zürcher Wochen-Chronik* 43 (1906), s.p.

34 Michèle Hofmann, “Ein schwacher Geist in einem schwachen Körper? Popularisierung medizinischen Wissens über geistige Schwäche im ausgehenden 19. und beginnenden 20. Jahrhundert in der Schweiz,” *Spurensuche: Zeitschrift für Geschichte der Erwachsenenbildung und Wissenschaftspopularisierung* 27 (2018), 4–13.

35 Adolf Ritter, “Eröffnungsworte des Präsidenten,” in *Verhandlungen der I. Schweizerischen Konferenz für das Idiotenwesen in Zürich am 3. und 4. Juni 1889*, ed. Adolf Ritter (Zürich: S. Höhr, 1889), 7.

estimates to the entire Swiss population, he came to “the truly sad result that there are about 30,000 idiots in Switzerland, of course taking the term in the broader sense, which includes the imbecile and the feeble-minded.”<sup>36</sup> In other words, according to Ritter, there were thousands of children in need of special education and other forms of care who were not receiving the support they needed. Although Ritter presented those numbers to prove a point, he knew that they were mere estimates based on regional surveys, a census conducted under the rule of Napoleon almost a century earlier, and a knowledge test administered to conscripts entering Swiss military service.<sup>37</sup> Nonetheless, the existing statistical knowledge still served to demonstrate that the number of children in need of help was too large to leave their wellbeing and care to chance or private charity. According to Ritter, the vast number of “imbeciles” and “feeble-minded” made it imperative for the state to take appropriate measures. He closed his address by expressing the hope that the state would come to the same conclusion and would thus feel compelled to establish special school classes for “feeble-minded” and educational institutions for “imbecile” children.

Based on their stance regarding the care and education for Swiss children with special needs, Ritter and other attendees at the first Swiss Conference on Idiocy can be called pioneers. Therefore, it is worthwhile to dissect and contextualise Ritter’s opening address. First, it is noteworthy that Ritter was a Protestant minister from Zurich who also presided over a charitable organisation, the Swiss Institution for Epileptics, which had run a home for epileptic children since 1886. Thus, Ritter was a representative of the traditional, well-established providers of charity in Switzerland – the church and private organisations. Why then did this man call for the state to provide more extensive and better care for “imbecile” and “feeble-minded” children? Why didn’t he call for the church to step up or appeal to the public to contribute more to private initiatives? Moreover, why did he advocate for specialised (i.e. segregative) educational measures such as special schools and institutions instead of proposing that those children should be cared for within the existing educational system?

A first answer to those questions lies in the organisation of public schooling in Switzerland during this period. As already mentioned, the federal constitution of 1874 stated that elementary schools should be state-run and provide “sufficient” education for all. Furthermore, the constitution declared elementary education compulsory for all children. The relevant paragraph of the constitution made no mention of “imbecile” or “feeble-minded” children; indeed, it did not specify who was required to attend elementary school. Proponents of special education, however, interpreted the constitutional paragraph to mean that compulsory schooling also applied to “abnormal” children, as long as they were educable.<sup>38</sup> Coincidentally, after the mid-nineteenth century, medical experts had come up with a classification that differentiated educable from non-educable children. Under the umbrella term of “idiocy,” three different degrees of intellectual “abnormality” were identified: intellectually disabled to a lesser extent (*schwachbegabt*,

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36 Ibid.

37 The Swiss military ran and marked those tests between 1875 and 1914. The test results were then sent to the Federal Statistical Office where the data were edited and eventually published. See Boser, Hofmann, and Brühwiler (2019), 81–84.

38 Michèle Hofmann, “Schwachsinnige’ Schulkinder als zukünftige BürgerInnen,” *Traverse: Zeitschrift für Geschichte* 24, no. 1 (2017b), 42–51.

“feeble-minded”), intellectually disabled to a greater extent (*schwachsinnig*, “imbecile”), and profoundly intellectually disabled (*blödsinnig*, “stupid”). This classification drew a line between “stupid” children who were not educable and “imbecile” and “feeble-minded” children who needed help and special care but were nonetheless educable.<sup>39</sup> According to this medico-educational understanding of who is educable and who is not, “imbecile” and “feeble-minded” were also afforded the right to be educated within the state school system. This constitutional obligation was exactly Ritter’s line of argumentation.<sup>40</sup>

However, although Ritter could tell roughly how many “imbecile” and “feeble-minded” children lived in Switzerland based on his statistical estimates, he did not know if they went to school or not, because he lacked the relevant statistical data. Some scattered numbers from individual Swiss cantons did exist,<sup>41</sup> but a holistic statistical overview of the situation was still to come, as we will show later in this article. In the absence of comprehensive evidence, Ritter could only assume that many of the intellectually “abnormal” children were not enrolled in school. He was also likely of view that, even if they were to go to school, they would fail to catch up with their “normal” peers, as they would struggle with comprehending what they were taught. Consequently, they would have to repeat years and would eventually fail to attain the primary educational goal of becoming moral, self-sufficient, and responsible citizens of the Swiss democracy.<sup>42</sup> If the state were to remedy this situation and follow through with the idea of providing a “decent existence” for every citizen,<sup>43</sup> the state would have to take special measures for those who needed special attention and specialised care. According to Ritter, the state could do this either by “financially and morally” supporting private initiatives or by establishing state-run special schools and institutions.<sup>44</sup>

Accordingly, in his opening address, Ritter drew upon the political will for a comprehensive, compulsory educational system serving the Swiss nation, as stated in the constitution. He also based his arguments on a medico-educational system of knowledge and reasoning that explains to which children the obligations mandated by the constitution do or do not apply. Since the state called for the establishment of this comprehensive, compulsory school system, its realisation was the state’s responsibility.

A second answer to the above questions can be found by looking more closely at Ritter’s speech. If we do so, we can find traces of what we might call actuarial thinking. At its core, this line of reasoning revolves around the notion that if we do not invest now, we will have to pay a much higher price in the future. In the context of educa-

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39 Hofmann (2018); Michèle Hofmann, “A Weak Mind in a Weak Body? Categorising Intellectually Disabled Children in the Nineteenth and Early Twentieth Centuries in Switzerland,” *History of Education* 48, no. 4 (2019), 452–65.

40 Ritter (1889), 5.

41 In the canton of Bern, for instance, a superintendent by the name of Antenen estimated that approximately 480 children would not go to school in 1863 because they were not educable. See “Zur Schulstatistik,” *Neue Berner Schul-Zeitung* 6, no. 38 (1863), 149.

42 See Nathalie Dahn and Lukas Boser, “Learning to See the Nation-State: Geography, History and Public Schooling in Late 19<sup>th</sup>-Century Switzerland,” *Bildungsgeschichte: International Journal for the Historiography of Education* 5, no. 1 (2015), 41–56.

43 Ritter (1889), 12.

44 Ibid.

tion, this means that if a society or a state does not ensure that all children receive an adequate education, that society or state will have to pay a high price for this omission in the future, as they will lack the means to support themselves once they reach adulthood. While this perspective might have been novel in Switzerland, in the 1880s, this was neither a new nor a revolutionary idea. In Scotland, for example, in 1833 the Education Committee of the General Assembly of the Church of Scotland published a report on the state of public education in the Scottish Highlands and Islands of Scotland.<sup>45</sup> In this report, the Education Committee stated that there were approximately 28,000 people in the Highlands and Islands who could not read. It further proposed that the problem could be solved by investing £7,680 into the building of new schools.<sup>46</sup> Investment in public education was intended to prevent future disasters. In this case, the anticipated future catastrophe was the moral decay that would result from an uneducated populace. To understand this line of thinking, it is important to remember that Scotland was a Protestant country and that, in Protestantism, reading the Bible is the only way to access the divine revelation. “Reading,” wrote the Scottish Society for the Education of the Poor in the Highlands in 1826, is “the most effective instrument of moral improvement.”<sup>47</sup>

Ritter could have made a similar argument in his speech. After all, he was a pastor in Zurich, one of the cradles of Swiss Protestantism. Denying thousands of “imbeciles” and “feeble-minded” the opportunity to learn how to read would also mean limiting their access to God’s Word and thus hindering their moral improvement. In the long run, this could be problematic for the Swiss society as a whole, so it would be wise to invest in the education of these children. However, since Ritter did not explicitly link education to moral improvement in his address, we do not know if he really thought this way. He stated that education is a way to improve “personal happiness”<sup>48</sup> but did not elaborate on what that entails. What we do know is that he was no stranger to actuarial thinking, for he also said the following: “Switzerland would gain two to three million [Swiss francs] a year if the idiots were rationally educated.”<sup>49</sup> What he meant was that educated people – even the “imbeciles” and “feeble-minded” – have a better chance of providing for themselves and are therefore less likely to become dependent on charity and welfare. Investing in education can thus be understood as a kind of insurance premium that reduces the risk of having to spend much more money in the future. For the present analysis, it is less important whether Ritter’s numbers are correct than the fact that he used this line of reasoning to support his case for state intervention in the education of children with disabilities. He relied on the power of knowledge grounded

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45 See Rebekka Horlacher, Sébastien A. Alix, and Lukas Boser Hofmann, “Nation-building by Education Statistics and Data: A Comparative Perspective on School Surveys in Switzerland, France, and Scotland,” in *Education, Curriculum and Nation-Building: Contributions of Comparative Education to the Understanding of Nations and Nationalism*, ed. Daniel Tröhler (New York: Routledge, 2023), 66–71.

46 Education Committee of the General Assembly of the Church of Scotland, *Educational Statistics of the Highlands and Islands of Scotland* (Edinburgh: J. and D. Collie, 1833), 22–23.

47 Society for the Education of the Poor in the Highlands, *Moral Statistics of the Highlands and Islands of Scotland* (Inverness: Education Society, 1826), 32.

48 Ritter (1889), 9.

49 Ibid.

in numbers and rational data – what Theodore Porter calls a “technology of trust” – to make a political demand.<sup>50</sup>

### Statistical surveys and the categorisation of “abnormal” children

As already mentioned, based on existing surveys, Ritter roughly calculated the number of intellectually “abnormal” children in Switzerland and used this statistical evidence to call for urgent action. On behalf of the Conference on Idiocy, Ritter demanded that the state establish more school classes for “feeble-minded” children, support existing institutions, and create new ones. According to Ritter, the basis for these state welfare measures was statistical data unequivocally demonstrating the need for state intervention. However, as discussed above, the existing data was both narrow in scope and partly outdated, only allowing for rough estimations. To remedy these shortcomings, Ritter called for an accurate, nationwide statistical survey.<sup>51</sup> Such a survey was initiated in 1897. But before we turn to that survey, let us look at the initiatives that preceded it.

Censuses have been conducted in Switzerland since the seventeenth century, initially at the cantonal level. The first census covering the entire territory of what was then Switzerland took place during the Helvetic period in 1798.<sup>52</sup> Over time, these surveys became increasingly sophisticated, capturing additional characteristics such as gender, age group, position in the household, citizenship, occupation, religion, and sometimes information on health status.<sup>53</sup>

Statistics focusing exclusively on health issues or disabilities were first introduced in the nineteenth century. Among the best-known are the so-called insanity statistics (*Irrenstatistiken*). These statistics were derived from comprehensive surveys aimed at ascertaining the number of people with a mental disorder in a particular canton or at the national level. The findings yielded by these initiatives served as a tool to shape society’s perception of mental disorders as a serious social challenge and to promote the development of psychiatry as a science. In the second half of the nineteenth century, these statistics also accelerated the emergence of many “lunatic asylums.”<sup>54</sup>

From the late 1860s, school statistics in Switzerland became a project of national importance.<sup>55</sup> For the World Exhibition in Vienna in 1873, the Federal Department of Home Affairs commissioned the already mentioned statistician and mathematician

50 Theodore M. Porter, *Trust in Numbers* (Princeton: Princeton University Press, 1995). See also Lengwiler (2002), 266.

51 Ritter (1889), 12.

52 See Thomas Busset, *Zur Geschichte der eidgenössischen Volkszählung* (Bern: Bundesamt für Statistik, 1993); Martin Schuler, *Volkszählungen in der Schweiz vor 1850: Die Bevölkerungszahlen auf lokaler Ebene* (Bern: Bundesamt für Statistik, 2023).

53 Schuler (2023), 47.

54 See Hans Rudolf Wilhelm, “Irrenzählung und Gründung psychiatrischer Kliniken im 19. Jahrhundert: Bern als Wegbereiter für andere Schweizer Kantone,” *Gesnerus: Swiss Journal of the History of Medicine and Sciences* 48, no. 2 (1991), 185–99; Hans Jakob Ritter, “Von den Irrenstatistiken zur ‘erblichen Belastung’ der Bevölkerung: Die Entwicklung der schweizerischen Irrenstatistiken zwischen 1850 und 1914,” *Traverse: Zeitschrift für Geschichte* 10, no. 1 (2003), 59–70; Silas Gusset, Loretta Seglias, and Martin Lengwiler, *Versorgen, behandeln, pflegen: Geschichte der Psychiatrie in Graubünden* (Basel: Schwabe, 2021), 45–55.

55 See Thomas Ruoss, *Zahlen, Zählen und Erzählen in der Bildungspolitik: Lokale Statistik, politische Praxis und die Entwicklung städtischer Schulen zwischen 1890 und 1930* (Zürich: Chronos, 2018), 32–34.

Hermann Kinkelin to compile comprehensive school statistics based on the dataset he had collected. Comprehensive school statistics for the whole of Switzerland were published regularly from the late nineteenth century onwards, from 1889 in the *Yearbook of Education in Switzerland (Jahrbuch des Unterrichtswesens in der Schweiz)* and from 1891 as a part of the *Statistical Yearbook of Switzerland (Statistisches Jahrbuch der Schweiz)*. Whereas the life stage of childhood or age played at most a marginal role as a survey category in censuses and health statistics, children were the primary focus of school statistics. During this time, schools and schoolchildren became the objects of scientific (i.e. statistical) analysis as well and were thus inevitably entangled in what Theodore Porter calls “the rise of statistical thinking.”<sup>56</sup>

In the late 1880s, at the time when Ritter delivered his opening address at the first Swiss Conference on Idiocy, cantonal-level surveys were being conducted with the aim of identifying intellectually “abnormal” children. Such a survey was conducted in the canton of Bern in 1888.<sup>57</sup> The Department of Education was interested in the number of pupils who were “not in the school year they should be in according to their age,” as it informed school inspectors and teachers in a circular letter. The letter went on to say that it was apparent that a striking number of pupils never progressed beyond the middle school years (six through nine) or even to the upper elementary school years (three through five). To find out the reasons “contributing to this dire phenomenon” so that it could “remedy the situation,”<sup>58</sup> the Department of Education issued pre-printed forms to teachers requesting that they record the number of children who were falling behind. Seven possible answers were listed on the form as reasons for underperformance. First on the list was “feeble-mindedness.” The other choices were “insufficient school attendance,” “neglected education,” “frequent change of residence,” “overcrowded school class,” “lack of language skills,” “inadequate nutrition,” and “other reasons.” For each choice, teachers were asked to indicate the number of children in their class to which it applied. They were also instructed to report the total number of their pupils. The school inspectors compiled the teachers’ responses for their school district and created charts showing the number of children who were falling behind, sorted by reason.

In 1892, the Bernese Department of Education carried out another survey.<sup>59</sup> This time, as the focus extended beyond the mere number of children falling behind, the forms teachers received were in two parts. The first part concerned those children who were completely exempt from attending school. Teachers were required to record the children’s names, dates of birth, length of exemption, reason for exemption, and whether a transfer to a special education facility would be advisable. The reasons for the exemption were not predetermined, but the explanation in a footnote makes it clear that the Department of Education assumed “idiocy” to be the main factor. This also made it clear that the term “special education facilities” meant those for intellectually

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56 Theodore M. Porter, *The Rise of Statistical Thinking, 1820–1900* (Princeton: Princeton University Press, 1986).

57 See State Archives of the Canton of Bern, BB IIIb 3378.

58 State Archives of the Canton of Bern, BB IIIb 3378, n.p.: December 11, 1888 – *Kreisschreiben der Direktion des Unterrichtswesens an die Primarlehrerschaft*.

59 See State Archives of the Canton of Bern, BB IIIb 3381.

“abnormal” children. The second part of the form concerned children who attended school but were falling behind. Teachers had to provide the children’s names, dates of birth, the school year they were supposed to attend, the school year they actually attended, the reason for falling behind, and whether attending a special education facility for intellectually “abnormal” children would be helpful.

In 1897, the first nationwide survey aiming to establish the number of intellectually “abnormal” children in Switzerland was conducted.<sup>60</sup> Between 1899 and 1911, the survey was administered annually. Pastor Ritter and the Swiss Idiocy Conference attendees were not alone in calling for such a survey. In particular, the Swiss Teachers Association had advocated for its establishment.<sup>61</sup> As the survey was conducted by the federal state, the Swiss Federal Statistical Office was responsible for its organisation as well as for processing and publishing the data.<sup>62</sup>

The Bernese statistics for 1888 and 1892 dealt mainly, but not exclusively, with intellectually “abnormal” children. In these two surveys, the various degrees of “idiocy” were treated rather implicitly. In contrast, in the national survey, the different levels of intellectual “disability” – distinguished according to the medical classification of “idiocy” – were explicitly mentioned in the pre-printed forms.<sup>63</sup> To ensure that the required information was obtained, those who were supposed to fill out the forms (mostly teachers) were given written instructions. A multi-page leaflet was distributed to thousands of Swiss elementary school teachers each year for this purpose.<sup>64</sup> The leaflet was written by Karl Kölle (1859–1959), director of the Institution for Imbecile Children in Regensberg (Zurich) and member of the Swiss Conference on Idiocy’s permanent committee. Despite lacking medical training, Kölle was considered an “expert on idiocy” due to his long-term teaching experience at institutions for “imbecile” children.<sup>65</sup> In his instructions, Kölle drew on medical knowledge to describe the three different forms of “idiocy,” which shows that by the turn of the twentieth century the medical classification of “idiocy” was so widely accepted that there seemed to be no alternative. At the same time, special school classes for “feeble-minded” pupils and educational institutions for “imbecile” pupils had been established (albeit in small numbers), which corresponded to this classification.

Owing to the national survey, the medical classification of “idiocy” started to permeate everyday school life. However, statistics did not simply reproduce medical categories of intellectual “abnormality” as they became instrumental in creating specific

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60 See also Hofmann (2019).

61 “Der Lehrertag von Luzern,” *Schweizerische Lehrerzeitung* 41, no. 24 (1896), 195.

62 In 1897, the results of the first survey were published in an extensive report. See *Die Zählung der schwachsinnigen Kinder im schulpflichtigen Alter mit Einschluss der körperlich gebrechlichen und sittlich verwahrlosten, durchgeführt im Monat Mai 1897*. I. Teil (Bern: Schmid & Francke, 1897). In the subsequent years, the surveys were conducted regularly, and the key findings were published in the *Journal for Swiss Statistics*.

63 *Die Zählung der schwachsinnigen Kinder* (1897), VIII–IX.

64 The leaflet was available in all Swiss national languages and was sent to the cantons each year along with the forms.

65 *Anleitungen für das Lehrpersonal, um die in das Alter der Schulpflichtigkeit getretenen Kinder auf das Vorhandensein geistiger und körperlicher Gebrechen zu untersuchen* (Bern: Neukomm & Zimmermann, 1899), 16.

notions of “abnormal” children.<sup>66</sup> Although “feeble-mindedness” and “imbecility” were medical terms, there existed no precise medical criteria for determining whether a child belonged in one of these categories. It was therefore up to the elementary school teachers to decide, or rather to define, who was “normal” and who was not. Each year, teachers had to fill out a form for their class, noting the children they identified as “feeble-minded” or “imbecile.” As a part of their professional activities, teachers observed many children of the same age over a long time. As a result, they grasped a notion of “normal” child development, which in turn provided the basis for assessing an individual child’s intellectual ability.<sup>67</sup> In other words, the teachers’ professional experience served as a background against which the characteristics of an intellectually “abnormal” child were outlined. In filling out the form, teachers aligned the medical knowledge provided in the leaflet with their professional knowledge.

Although the forms were not filled out for all Swiss elementary school classes,<sup>68</sup> teachers identified thousands of “feeble-minded” and “imbecile” pupils each year. As a result, in the context of the annual statistical surveys, the medical categories of “idiocy” were linked to thousands of flesh-and-blood children. For Pastor Ritter and his comrades-in-arms, the large-scale nationwide surveys provided definitive proof that their initial calculations were correct and that there were many neglected “abnormal” children in mainstream schools. They used this statistical evidence to bolster their demand for the creation of special classes and institutions to separate these “poor souls” from their “normal” peers while keeping them within the state school system and thereby adhering to the prevailing educational goals.<sup>69</sup> At the regular meetings of the Swiss Conference on Idiocy and its successor associations,<sup>70</sup> members not only presented and discussed the most recent national statistics but also reported on the

66 See also Michèle Hofmann, “Schwachbegabt, schwachsinnig, blödsinnig – Kategorisierung geistig beeinträchtigter Kinder um 1900,” *Bildungsgeschichte: International Journal for the Historiography of Education* 7, no. 2 (2017a), 142–56.

67 Florian Eßer, “Die verwissenschaftliche Kindheit,” in *Kindheiten in der Moderne: Eine Geschichte der Sorge*, ed. Meike S. Baader, Florian Eßer, and Wolfgang Schröer (Frankfurt: Campus, 2014), 126.

68 The cantons were responsible for compiling the data and submitting it to the Federal Statistical Office. As the example of the canton of Bern shows, the Department of Education repeatedly complained in the *Official School Gazette (Amtliches Schulblatt)* that teachers were not sending the forms to the school inspectors on time or not at all. See, e.g., “Bekanntmachung betreffend die Untersuchung der ins schulpflichtige Alter tretenden Kinder,” *Amtliches Schulblatt des Kantons Bern* 4, no. 7 (1900), 1. As some cantons did not send any data to the Federal Statistical Office, those that did (which were in the majority) are listed in the periodic overviews published in the *Journal for Swiss Statistics (Zeitschrift für Schweizerische Statistik)*.

69 Michèle Hofmann, “Same but Different: Notions of ‘Feeble-minded’ and ‘Imbecile’ Future Citizens in German-Speaking Countries at the Turn of the 20<sup>th</sup> Century,” in *National Literacies in Education: Historical Reflections on the Nexus of Nations, National Identity, and Education*, ed. Stephanie Fox and Lukas Boser (New York: Palgrave Macmillan, 2023), 81–94.

70 The association changed its name several times over the years, not least because the terminology used to describe intellectually “abnormal” children also changed.

development of special educational measures for intellectually “abnormal” children.<sup>71</sup> Members of the Swiss Conference on Idiocy thus hailed the expansion of the state-funded separate school system as progress.

### From integration through separation to inclusion

Well into the twentieth century, the Swiss cantonal school systems followed the principle of integration through separation.<sup>72</sup> Due to this, children with disabilities or learning difficulties, as well as children from immigrant backgrounds, were either temporarily or permanently separated from their peers and were schooled in special settings with the goal of reintegrating them into the society once their (special) education was completed.<sup>73</sup> The idea was that, by identifying the children with special needs and giving them education tailored to their specific dis/abilities, those children – and the society as a whole – would be best served.

However, at the same time, Switzerland “was a pioneering nation in the implementation and development of eugenic thinking.”<sup>74</sup> While the scientific data gathered and analysed by doctors and teachers could be used to identify and then help those in need, the very same data could also be used to pinpoint and then remove those who were considered to be a threat to society. For eugenicists, the separation and segregation of the “abnormal” was about safeguarding the “quality” of the Swiss people and protecting them from “degeneration,”<sup>75</sup> not about helping the “poor idiotic souls.” Without going further into details of the history of eugenics in Switzerland, it is important to note that, in this context, labels such as “idiotic” or “abnormal” were associated with “inferiority,” “degeneration,” and “deficiency” and therewith changed their qualities from medical

71 See, e.g., Conrad Auer, “Gegenwärtiger Stand der Sorge für geistesschwache Kinder in der Schweiz, mit besonderer Berücksichtigung der in den letzten beiden Jahren erzielten Fortschritte,” in *Verhandlungen der V. Schweizerischen Konferenz für das Idiotenwesen in St. Gallen am 5. und 6. Juni 1905*, ed. Conrad Auer, Karl Kölle, and Hermann Graf (Glarus: Buchdruck Glarner Nachrichten, 1905), 27–49; Conrad Auer, “Gegenwärtiger Stand der Fürsorge für Geistesschwache in der Schweiz, mit besonderer Berücksichtigung der in den letzten zwei Jahren erzielten Fortschritte,” in *Verhandlungen der VIII. Schweiz. Konferenz für Erziehung und Pflege Geistesschwacher am 26. und 27. Mai 1911 in Bern*, ed. Conrad Auer (Glarus: Buchdruck Glarner Nachrichten, 1911), 25–64; Heinrich Plüer, “Bemerkungen zu den statistischen Tabellen,” in *Verhandlungen der XII. Schweizerischen Konferenz für Erziehung und Pflege Geistesschwacher am 8. und 9. Oktober 1921 in Genf*, ed. Karl Jauch (Zürich: Gesellschaft für Erziehung und Pflege Geistesschwacher, 1921), 68–74.

72 See Martin Lengwiler, “Der strafende Sozialstaat: Konzeptuelle Überlegungen zur Geschichte fürsorglicher Zwangsmassnahmen,” *Traverse: Zeitschrift für Geschichte* 25, no. 1 (2018), 183.

73 See Cristina Allemann-Ghionda, *Schule, Bildung und Pluralität: Sechs Fallstudien im europäischen Vergleich* (Bern: Lang, 1999), 262–479; Carlo Wolfisberg, “Der institutionelle Umgang mit der Heterogenität der Schulkinder,” in *Zukunft bilden: Die Geschichte der modernen Zürcher Volksschule*, ed. Daniel Tröhler and Urs Hardegger (Zürich: Verlag Neue Zürcher Zeitung, 2008), 189–99; Philipp Eigenmann and Tamara Deluigi, “Bildungsgerechtigkeit und Chancengleichheit: Ideen, Aushandlungen und Reformen in der Schweiz nach 1950,” in *Bildungsgeschichte: Systementwicklung im 19. und 20. Jahrhundert in der deutschsprachigen Schweiz*, ed. Ingrid Brühwiler et al. (Zürich: Chronos, forthcoming).

74 Natalia Gerodetti, “From Science to Social Technology: Eugenics and Politics in Twentieth-Century Switzerland,” *Social Politics* 13, no. 1 (2006), 60; Véronique Mottier, “Eugenics, Politics and the State: Social Democracy and the Swiss ‘Gardening State,’” *Studies in History and Philosophy of Biological and Biomedical Sciences* 39, no. 2 (2008), 263–69.

75 Regina Wecker, “Eugenics in Switzerland Before and After 1945 – a Continuum?” *Journal of Modern European History* 10, no. 2 (2012), 522.

(and pedagogical) diagnoses to social stigmata. Welfare-state measures and eugenics also shared the goal of cost-saving by reducing the number of individuals who needed financial support from the state.<sup>76</sup> Social insurance and special needs education could provide the desired cost reduction, as could sterilisation and other eugenic measures.

As the decades passed, it was slowly but surely becoming clear that some of the segregative welfare-state measures, even when taken with the best of intentions, were not working as planned. In many cases, children who were taken from their homes (often against their parents' will) and placed in special institutions were mistreated, exploited, and abused, leaving them with physical and mental scars and long-lasting trauma. This dark chapter of Swiss social history has been the subject of academic research in recent years.<sup>77</sup> In retrospect, historian Martin Lengwiler writes that the Swiss welfare state had developed in part into a "punitive welfare state" (*strafender Sozialstaat*).<sup>78</sup>

Although not all children who were labelled "abnormal" and were educated separately from their "normal" peers had to endure mistreatment and abuse, they nonetheless often suffered due to the negative connotations that such a label entailed.<sup>79</sup> The stigma of being placed in a special school class or a special institution lasted beyond the school years, shaping their entire life trajectory. For these children, educational segregation led to social separation, not integration. Most cantonal school systems were semi-permeable, allowing mobility from mainstream schools to special classes or special institutions but not the other way around. In the end, many children who ended up in special classes or special institutions struggled to achieve independence later in life, not least because it was difficult for them to find jobs or apprenticeships. Moreover, in the Swiss understanding of meritocracy, a school diploma is generally accepted as a measure of merit and thus of social status.<sup>80</sup> In this context, graduating

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76 Mottier (2008), 265.

77 See, e.g., Markus Furrer et al., eds., *Fürsorge und Zwang: Fremdplatzierung von Kindern und Jugendlichen in der Schweiz 1850–1980* (Basel: Schwabe, 2014); Sara Galle, *Kindswegnahmen: Das "Hilfswerk für die Kinder der Landstrasse" der Stiftung Pro Juventute im Kontext der schweizerischen Jugendfürsorge* (Zürich: Chronos, 2016); Christoph Häfeli, Martin Lengwiler, and Margot Vogel Campanello, eds., *Zwischen Schutz und Zwang: Normen und Praktiken im Wandel der Zeit* (Basel: Schwabe, 2024); Urs Hafner, *Heimkinder: Eine Geschichte des Aufwachsens in der Anstalt* (Baden: hier + jetzt, 2011); Gisela Hauss, Thomas Gabriel, and Martin Lengwiler, eds., *Fremdplatziert: Heimerziehung in der Schweiz, 1940–1990* (Zürich: Chronos, 2018); Marco Leuenberger and Loretta Seglias, *Geprägt fürs Leben: Lebenswelten fremdplatzierter Kinder in der Schweiz im 20. Jahrhundert* (Zürich: Chronos, 2015); Nadja Ramsauer, "Verwahrlost:" *Kindswegnahmen und die Entstehung der Jugendfürsorge im schweizerischen Sozialstaat, 1900–1945* (Zürich: Chronos, 2000); Mirjam Janett, *Verwaltete Familien: Vormundschaft und Fremdplatzierung in der Deutschschweiz, 1945–1980* (Zürich: Chronos, 2022).

78 Lengwiler (2018).

79 See Clara Bombach, Thomas Gabriel, and Samuel Keller, "Die wussten einfach, woher ich komme:' Staatliche Eingriffe und ihre Auswirkungen auf das Leben ehemaliger Heimkinder," in *Fürsorge und Zwang: Fremdplatzierung von Kindern und Jugendlichen in der Schweiz 1850–1980*, ed. Markus Furrer et al. (Basel: Schwabe, 2014), 117–37; René Knüsel, Alexander Grob, and Véronique Mottier, eds., *Schicksale der Fremdplatzierung: Behördenentscheidungen und Auswirkungen auf den Lebenslauf* (Basel: Schwabe, 2024).

80 For a discussion on the topic of inclusion and meritocracy, see Anja Gibson et al., "Mehr als Meritokratie? Über die Prozessierung von Inklusivität und Exklusivität in Schulkulturen," in *Inklusion und Grenzen: Soziale, politische und pädagogische Verhältnisse*, ed. Kathrin Blaha et al. (Bielefeld: transcript, 2024), 297–327.

from a special class or a special institution meant that one had only climbed the first and lowest rung of the social ladder.

The late twentieth century saw the rise of various social movements, such as the women's rights movement (remember that Switzerland did not have universal suffrage until 1971!), the gay and lesbian rights movement, and the disability rights movement.<sup>81</sup> As children's rights were also discussed in this context, it is fitting that Switzerland ratified the UN Convention on the Rights of the Child in 1997.<sup>82</sup> Although, as shown earlier in this article, children's right to education was part of the argument for the introduction of special classes and special institutions for "abnormal" children at the end of the nineteenth century, by the late 1990s, this practice of segregation was recognised as ineffective, for it was restricting these children's right to an equal education. History had shown that a segregated school system would not give children with special needs equal opportunities in life. To remedy this issue, the Swiss federal state committed to transforming its school system from a segregated one to an inclusive one, as discussed in the introduction to this article. However, as the Swiss public schools are still run by the cantons, this process is proving to be slow and has also been criticised, especially in the recent past. Political initiatives in several Swiss cantons are currently calling for the introduction of more special classes and thus a return to a more segregated school system.<sup>83</sup>

## Conclusion

In conclusion, we would like to revisit the hypothesis we put forward at the beginning of this article. We suggest that not only inclusive education but also the previous paradigm – segregated education – are closely linked to the Swiss welfare state and its logic. This hypothesis forms the background to the following reflections on the process of transformation from a segregated to a more inclusive Swiss school system. In the first phase of this transformation (i.e. the late nineteenth and early twentieth centuries) as well as in its second phase (i.e. the late twentieth and early twentyfirst centuries), politicians and other actors interested in children's wellbeing have advocated for welfare-state measures aimed at the education of children with disabilities. In the late nineteenth and early twentieth centuries, these welfare-state policies focused on identifying, segregating, and then educating "abnormal" children in special classes and special schools. The production of knowledge about children was crucial to these processes. Statistical knowledge gathered through cantonal and national surveys on intellectually "abnormal" children, together with medical knowledge and the professional knowledge of teachers, shaped the notions of "idiotic" children and their educability. Educability

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81 See, e.g., Ute Gerhard, *Frauenbewegung und Feminismus: Eine Geschichte seit 1789* (München: Beck, 2020); Vern L. Bullough, ed., *Before Stonewall: Activists for Gay and Lesbian Rights in Historical Context* (Binghamton: Harrington Park Press, 2002); Doris Fleischer Zames and Frieda Zames, *The Disability Rights Movement: From Charity to Confrontation* (Philadelphia: Temple University Press, 2001).

82 See Louissette Hurni-Caille, *Kinderrechte in der Schweiz: Das Schweizer Recht und die Konvention der Vereinten Nationen über die Rechte des Kindes im Vergleich* (Grand-Lancy: Die Rechte des Kindes-International, 2001).

83 Such an initiative has, for example, been approved by the parliament of the most populous canton (Zurich). See, e.g., Giorgio Scherrer, "Zürich führt wieder Förderklassen ein," *Neue Zürcher Zeitung*, March 25, 2025, 13.

was the keyword in this context. “Idiotic” children were separated from their “normal” peers with the intent to provide them with an adequate education.

As the processes of identification, segregation, and special education proved to be highly stigmatising for the children concerned, in the late twentieth and early twenty-first centuries, inclusion became the policy of choice. However, at least in Switzerland, this transformation is complicated, not least by the fact that the school system is still supposed to uphold the principle of meritocracy.<sup>84</sup> This principle states that social inequalities are acceptable as long as they can be explained by merit, i.e. the efforts made to achieve a certain social status. Since the early 1800s, the main measure of merit in Switzerland has been educational attainment.<sup>85</sup> While the segregated school system, with its distinct tracks and trajectories, is seemingly well suited to marking differences based on merit, the inclusive school system, where all children attend the same class, is less so.

The issue at hand can be examined from yet another angle. Welfare-state measures were not only taken for the benefit of the individual but also for the good of the state. As discussed above, the early Swiss welfare state was concerned with cost reduction, which led its proponents to think in terms of insurance policies, but this reduction also could be achieved by implementing eugenic measures.<sup>86</sup> Gathering large corpora of scientific data was meant to provide policymakers with the knowledge that could be used to implement social measures, which would be more cost-effective in the long run. When Pastor Ritter promised yearly savings of two to three million Swiss francs, this was a strong incentive for realising his proposed welfare-state measures. As Ritter and his colleagues were well aware that an integration-through-separation scheme required considerable resources, they asked for financial support from the state. However, they also understood that the investment in special schools and special classes would pay dividends by eliminating the need for charity in the future.

The same hope for cost reductions is also inherent in the current welfare-state policies with regard to inclusion. In fact, the fourth bullet point in paragraph 2 of the Salamanca Statement reads as follows:

[R]egular schools within this inclusive orientation are the most effective means of combating discriminatory attitudes, creating welcoming communities, building an inclusive society and achieving education for all; moreover, they provide an effective education to the majority of children and improve the efficacy and ultimately the cost-effectiveness of the entire education system.<sup>87</sup>

84 See Andreas Hadjar and Rolf Becker, “Education Systems and Meritocracy: Social Origin, Educational and Status Attainment,” in *Education Systems and Inequalities: International Comparisons*, ed. Andreas Hadjar and Christiane Gross (Bristol: Policy Press, 2016), 231–58; Barbara Zimmermann and Rolf Becker, “Die Sozialstruktur der Bildungsvorstellungen in der Schweiz,” *Swiss Journal of Sociology* 49, no. 1 (2023), 153–77.

85 See Anna Bütikofer, “Der Preis der Gleichheit: Die Aristokratie der Besten,” in *Lehrbuch Pädagogik. Eine Einführung in grundlegende Themenfelder*, ed. Michèle Hofmann et al. (Bern: hep, 2015), 177–90.

86 See Mottier (2008), 256.

87 UNESCO (1994), viii.

This last assumption resonated well with the views held by the Swiss policymakers. As the Swiss education system has been under pressure to cut costs in recent decades, the promise of cost-effectiveness sounded too good to miss. In reality, however, inclusion comes at a price. Inclusive education requires specific resources, such as adequate classrooms, a maximum number of children with special needs per school class, and additional special education teachers, whose training also comes at a cost.<sup>88</sup> Inclusive education will remain controversial as long as neither the cantons nor the Confederation are fully committed to paying this price.

Comparing welfare-state policies for children with special needs in the late nineteenth and early twentieth centuries with those in the late twentieth and early twenty-first centuries, it seems that they are not so dissimilar after all. The differences in methods are evident, but the goals remain the same: to help individuals find their place in society while lessening the financial burden on the state.

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88 See, e.g., Jürg Rüedi, “Editorial,” *Zeitschrift für Individualpsychologie* 39, no. 4 (2014), 278.

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## Special Tools: Educational Technologies for Children and Adults with Disabilities in Switzerland, 1970s to 1990s

*Michael Geiss*

**Abstract** • This article examines the history of computer-based technologies for children and adults with disabilities. Using Switzerland as an example, it demonstrates how special hardware and software for people with disabilities became a national policy issue in the last decades of the twentieth century. The focus is on private and public actors, and the historical sources are publications, newspapers, magazines and archival documents. Starting with early regional efforts to develop specialised electronic devices in the French-speaking part of Switzerland, the article first shows the enthusiasm that accompanied the development of new tools for people with disabilities in the 1980s. From the late 1980s, experts in special education and technology development began to network with national stakeholders in computer education. However, this did not generate significant momentum, highlighting the limits of ambitious educational policies in the so-called post-liberal welfare state.

**Keywords** • history of education, disability history, computers, educational technology, Switzerland

### Introduction

Children, young people and adults with disabilities have not featured prominently in research into the history of educational computing. Given the debates about computers and other electronic devices in special education since the 1970s, this is more than surprising.<sup>1</sup> To date, historical research has focused mainly on computer literacy campaigns and the computer as an educational tool.<sup>2</sup> Specific target groups are only rarely addressed.<sup>3</sup> Computer-based technologies adapted for people with physical or

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1 The historical research documented in this article was supported by a grant from the Swiss National Science Foundation (SNSF) (project number 182217). See, for example, J. D. Fletcher and Patrick Suppes, “The Stanford Project on Computer-Assisted Instruction for Hearing-Impaired Students,” *Journal of Computer-Based Instruction* 3, no. 1 (1976), 1–12; Arthur Boothroyd and Harry Levitt, “Computers and the Education of Hearing-Impaired Children: Possibilities and Limitations,” in *Uses of Computers in Aiding the Disabled: Proceedings of the IFIP-IMIA Working Conference on Uses of Computers in Aiding the Disabled, Haifa, Israel, 3–5 November, 1981* (Amsterdam: Elsevier Science Pub. Co., 1981), 285–93.

2 Carmen Flury and Michael Geiss, eds., *How Computers Entered the Classroom, 1960–2000: Historical Perspectives* (Berlin, Boston: De Gruyter Oldenbourg, 2023).

3 At most, programs for girls and women have been analysed or the privileged situation of early users of educational computing. See Joy Lisi Rankin, *A People's History of Computing in the United States* (Cambridge, MA: Harvard University Press, 2018); Rosalía Guerrero Cantarell, “Technology as a Woman's Call: The Efforts of the Fredrika Bremer Association to Promote Women's Education in Technology 1978–1999,” *Nordic Journal of Educational History* 9, no. 2 (2022), 125–47.

intellectual disabilities, or the educational consequences of computers for them, have barely been considered.<sup>4</sup>

This article explores how individuals, private associations, foundations and public authorities in Switzerland have made educational technology for people with disabilities a policy issue, with a particular focus on computer hardware and educational software. Historically, this has happened in two ways: firstly, in understanding micro-computers as an “assistive” technology or as a complement to already existing “assistive” hardware. Secondly, with regard to the development of specialised learning software that should also be suitable for children and adults with disabilities. In so doing, the article adds a European perspective to the few existing studies on the history of “assistive” educational technologies, and it offers a view of the history of educational computing that does not further ignore technologies for people with disabilities.

From a methodological perspective, the article is informed by historical institutionalism. In other words, it examines the interventions of organised groups over time and the resulting institutional consequences. The focus is on both state actors and private organisations. Special attention is given to the institutional context in which private and public actors operated, particularly within what Christine Trampusch has termed a “post-liberal welfare regime.”<sup>5</sup> To give a voice to those who are not part of the established Swiss institutional setting, the statements of the Swiss disability rights movement on computer technology are also taken into account.

The article is based on publications (journals, brochures, edited volumes, studies, conference reports) of the main Swiss organisations in the field of disabilities, special needs education and computer education, the Swiss daily press and the archival holdings (correspondence, minutes, memos, newsletters) of the Swiss Centre for Information Technologies in Education. It analyses how the issue of educational technologies for people with disabilities was put on the political agenda in Switzerland and which actors collaborated to achieve this.

First, the historical study will be situated in the current state of research. Secondly, the methodological approach and the historical sources will be described. Thirdly, the article presents the educational computing movement in Switzerland, and beyond, as an important historical background against which the discussions and experiments on the use of computers by people with disabilities took place. It then shows how the roots of the development of tools for people with disabilities lie elsewhere, in so-called “assistive” electronic devices. It was, however, only with the expanding educational software market that the computer education advocates in the public authorities came into contact with special education experts. The final section focuses on the coordination of activities between private and state actors in the 1990s. The article concludes with a brief summary of the main results.

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4 The exception to this rule is Elizabeth Petrick’s important historical study of how closely private computer companies, educators and disability activists in the United States worked together to make computers accessible to young learners with disabilities in the last decades of the twentieth century. See Elizabeth Petrick, *Making Computers Accessible: Disability Rights and Digital Technology* (Baltimore: Johns Hopkins University Press, 2015).

5 Christine Trampusch, “The Welfare State and Trade Unions in Switzerland: An Historical Reconstruction of the Shift from a Liberal to a Post-Liberal Welfare Regime,” *Journal of European Social Policy* 20, no. 1 (2010), 58–73. <https://doi.org/10.1177/0958928709352539>.

### *State of research*

The history of computers has been written from the perspective of the able-bodied and able-minded. The perspective of children and adults with disabilities is only marginally represented in the main works on computer history.<sup>6</sup> The same is true of historical research on educational computing. While race, class, and gender are – at least sometimes – addressed, people who do not physically or intellectually conform to the norm are largely absent in research on the role of computers in education.<sup>7</sup>

There are, however, exceptions to this rule: a few historical studies focus explicitly on computer applications for people with disabilities. The benchmarking historical study here is Elisabeth Petrick's *Making computers accessible: disability rights and digital technology*.<sup>8</sup> Petrick shows how the history of computers can only be understood by considering the practical attempts of disability rights activists and technology developers to ensure greater accessibility. For Petrick, placing people with disabilities at the centre of computer history highlights how optimising computers for diverse needs enabled their evolution into the powerful, all-purpose devices integral to everyday life today.<sup>9</sup>

Petrick's central findings also serve as a foundation for interpreting historical developments in Switzerland in this article. In her historical study, she first illustrates how the question of computer-based assistive technologies and the general role of computers for people with disabilities spurred numerous developments and initiatives even before the advent of the microcomputer in the late 1970s. She emphasises that, unlike the broader discussion around a computerised future, this movement was not primarily driven by visions and utopias but rather by the search for practical solutions in everyday life. In the early 1980s, small US-American companies then developed highly specialised applications for a relatively limited number of potential users with a variety of disabilities. Many of these innovations, which enhanced accessibility but had little scaling potential, were later integrated as standard features in microcomputer architecture. Petrick also examines the role of major tech companies (especially IBM and Apple Computer) in accessibility efforts since the mid-1980s, highlighting their collaboration with disability advocates. This intersection of big tech philanthropy and the disability rights movement is the central focus of her book.<sup>10</sup>

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6 Martin Campbell-Kelly et al., *Computer: A History of the Information Machine*, 3<sup>rd</sup> ed. (New York: Routledge, 2019); Thomas Haigh and Paul E. Ceruzzi, *A New History of Modern Computing* (Cambridge, MA: The MIT Press, 2021). This ignorance is even though, for example, blind people were one of the target groups and early users of important general innovations in computer technology, such as optical character recognition (OCR), which was later scaled up. See Ray Hazan and Anita Hunt, "For Once the Blind Came First: The History of the Kurzweil 1970–1990," *British Journal of Visual Impairment* 8, no. 2 (1990), 45–47.

7 Rankin (2018); Flury and Geiss (2023); Victoria Cain, *Schools and Screens: A Watchful History* (Cambridge: MIT Press, 2021).

8 Petrick (2015).

9 Elisabeth Petrick, "The Computer as Prosthesis? Embodiment, Augmentation, and Disability," in *Abstractions and Embodiments: New Histories of Computing and Society*, ed. Janet Abbate and Stephanie Dick (Baltimore: Johns Hopkins University Press, 2022), 399–415.

10 Petrick (2015).

Petrick's historical study has since inspired others and is the starting point for my case study on Switzerland.<sup>11</sup> However, mainstream history of educational computing also provides lessons for this article. The general computer euphoria since the late 1970s mobilised policymakers, civil society groups, and corporations on a large scale.<sup>12</sup> In her book on the Apple II, however, Laine Nooney argued that the computer could only become widely accepted once a differentiated and specialised software landscape was in place. Only when people knew what to do with the computer could the vision of a computerised society become a reality.<sup>13</sup> As will be shown in the following, this has been the case not only for office software and other applications, but also for hardware and software specifically tailored to people with physical or intellectual disabilities.

This article advances the state of research in two ways: firstly, it adds a European case study to the small body of already existing research on the history of educational technologies for people with disabilities. Previous findings have been heavily based on contexts and experiences in the USA, with its dynamic technology industry and huge computer firms like IBM or Apple. Secondly, the article refines the research focus on technologies for people with disabilities within the history of computerisation and educational computing.

### *Theory, methodology and sources*

Methodologically, the article draws on historical institutionalism. This means that it focuses on the relationship between state and non-state actors and examines the extent to which state authorities, private associations or foundations, and other organisations, have been able to bring their interests to bear. The focus is on the interventions of different stakeholders, the coordination of interests between them and the resulting institutional effects.<sup>14</sup>

How the relationship between the various state and non-state political actors in Switzerland can be theoretically defined depends first and foremost on the analysed policy field. In public education, the pronounced federalism with a strong fiscal and administrative role of the municipalities and cantons must be emphasised. To date, there is no overarching Swiss public-school law and, despite trends toward harmonisation, the governance of public education still varies considerably between cantons, language regions or even individual municipalities.<sup>15</sup> Only in the field of vocational

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11 Di Wu, "Crippling the History of Computing," *IEEE Annals of the History of Computing* 43, no. 3 (2021), 68–72; Philipp Macele and Jan Muggenburger, "Playing with the Eyes. A Media History of Eye Tracking," in *Disability and Video Games: Practices of En-/Disabling Modes of Digital Gaming*, ed. Markus Spöhrer and Beate Ochsner (Cham: Springer International Publishing, 2024), 117–43.

12 Flury and Geiss (2023).

13 Laine Nooney, *The Apple II Age: How the Computer Became Personal* (Chicago: The University of Chicago Press, 2023).

14 Kathleen Thelen, *How Institutions Evolve: The Political Economy of Skills in Germany, Britain, the United States, and Japan* (Cambridge: Cambridge University Press, 2004); Lukas Graf, "Historical Institutionalism in Education and Globalization," in *Oxford Handbook on Education and Globalization*, edited by Paolo Mattei, Xavier Dumay, Eric Mangez, and Jacques Behrend (Oxford: Oxford University Press, 2023), 74–94.

15 Gunther M. Hega, "Federalism, Subsidiarity and Education Policy in Switzerland," *Regional & Federal Studies* 10 (2000), 1–35. <https://doi.org/10.1080/13597560008421107>; Anja Giudici and Patrick Emmenegger, "Education policy," in *The Oxford Handbook of Swiss Politics* (Oxford: Oxford University Press, 2023), 604–22.

education and training does a national education act exist. However, in this context professional and employer associations and other private organisations are heavily involved in what has been labelled a “collective skill formation system.”<sup>16</sup>

When it comes to children and young adults with disabilities, it is not only the governance of education that determines how state and non-state actors in Switzerland can intervene or participate in policymaking. Welfare state measures and social policies have also to be considered.<sup>17</sup> In Esping-Andersen’s classic typology, Switzerland has been labelled a “liberal welfare state;” others have emphasised that the Swiss welfare regime is “notoriously difficult to classify.”<sup>18</sup>

Although there has been a shift towards the continental model of the welfare state since the 1970s, the Swiss system retains a distinctly liberal character. Historically, Switzerland is considered a latecomer in the development of the welfare state. A national disability insurance scheme was not introduced in Switzerland until 1960. It was used to fund, among other things, labour market integration and technical aids, and to subsidise special schools for people with disabilities.<sup>19</sup> Like in public education, federalism continues to structure the Swiss welfare state to this day. Like in vocational education and training, the role that private organisations play in providing services is noteworthy. The result is a “fragmented welfare state with several coordination problems.”<sup>20</sup>

Historical institutionalism tends to reproduce the power relations in the historical field analysed. Less powerful and marginalised social groups and individuals are not, or rarely, represented here – this includes people with disabilities. In the historical field at the centre of this article, people with disabilities are often spoken for rather than speak for themselves, particularly when policies or coordinated actions are being negotiated. The article attempts to mitigate this by including the position of members of the Swiss disability rights movement.<sup>21</sup>

When this article talks about “physical,” “intellectual” or “learning” disabilities, these are the classifications that were made in the professional, scientific and political fields in Switzerland between the 1970s and 1990s. The same applies to electronic and digital technologies, which were framed during these decades as “aids” or “assistive”

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16 Philipp Gonon and Markus Maurer, “Education Policy Actors as Stakeholders in the Development of the Collective Skill System: The Case of Switzerland,” in *The Political Economy of Collective Skill Formation* (Oxford: Oxford University Press, 2012), 126–49.

17 Trampusch (2010).

18 Hanspeter Kriesi and Alexander H. Trechsel, *The Politics of Switzerland: Continuity and Change in a Consensus Democracy* (Cambridge: Cambridge University Press, 2008), p. 155.

19 “Behinderungen,” in *Geschichte der Sozialen Sicherheit in der Schweiz* (Bern: Bundesamt für Sozialversicherungen, 2013). <https://www.geschichtedersozialensicherheit.ch/risikogeschichte/behinderung>.

20 Giuliano Bonoli and Flavia Fossati, “Social Policy,” in *The Oxford Handbook of Swiss Politics* (Oxford: Oxford University Press, 2023), p. 705.

21 On the role of power and the problem of institutional perspectives in disability history see Elizabeth Bredberg, “Writing Disability History: Problems, Perspectives and Sources,” *Disability & Society* 14, no. 2 (1999), 189–201; Catherine J. Kudlick, “Disability History: Why We Need Another ‘Other,’” *The American Historical Review* 108, no. 3 (2003), 763–93; Alfredo J. Artilles, Sherman Dorn and Aydin Bal, “Objects of Protection, Enduring Nodes of Difference: Disability Intersections With ‘Other’ Differences, 1916 to 2016,” *Review of Research in Education* 40 (2016), 777–820.

tools for people with disabilities.<sup>22</sup> The sources analysed for this article very rarely reveal where computers were experienced and understood as “assistive” by users with certain disabilities. Where explicit statements could be found in the historical material, these are mentioned in the article.

The historical analysis documented in this article is based on published and archival sources. Firstly, publications by government agencies, disability organisations, special education experts, the Swiss disability rights movement, and academic scholars will be considered. Secondly, the Swiss daily press will be analysed. Thirdly, the historical holdings of the Swiss Centre for Information Technologies in Education (SFIB) in the State Archives of Lucerne (StALU) will be examined. The correspondence, minutes, memos and newsletters available here provide an insight into the main negotiations, particularly in the 1990s.

### **Background: the advent of the microcomputer and early educational computing initiatives in Switzerland**

Switzerland never developed a significant computer industry, but it was an important place in Europe for research and development into new technologies during the entire twentieth century. It became a hotspot for the engineering industry during the period of high industrialisation, and Swiss companies and business associations became closely intertwined with technical universities and colleges. Since the 1950s, the technical universities and colleges remained vital to the country’s industrial innovation and supply of skilled workers to compete with other highly industrialised countries (and the Cold War enemy behind the iron curtain).<sup>23</sup>

Although Switzerland was not able to develop its own competitive computer industry, groundbreaking inventions in the field of computer technology were made at Swiss universities. One of the first electronic computers in Switzerland, the ERMETH (*Elektronische Rechenmaschine der ETH*), was developed at the Federal Institute of Technology Zurich (ETH) in the late 1940s and then used for many years. “Lilith,” a microcomputer with graphics and a computer mouse, was also developed at ETH and was in use at the end of the 1970s. ETH Zurich also played a central role in the development of programming languages. The global company Logitech, founded in Switzerland in 1981 and known worldwide for its computer mice, had very close links with the *École polytechnique fédérale de Lausanne* (EPFL).<sup>24</sup>

22 Mara Mills, “Technology,” in *Keywords for Disability Studies*, ed. Rachel Adams, Benjamin Reiss, and David Serlin (New York: New York University Press, 2015), 176–79.

23 Fritz Hummler, “Bemerkungen zum Problem des wissenschaftlichen und technischen Nachwuchses,” *Mitteilungsblatt des Delegierten für Arbeitsbeschaffung* 11, no. 3 (1955), 55–61; David Gugerli, Patrick Kupper, and Daniel Speich, *Transforming the Future: ETH Zurich and the Construction of Modern Switzerland 1855-2005* (Zurich: Chronos, 2010), 191–217.

24 Juri Jaquemé, “ERMETH – Computer Made in Switzerland,” *Swiss National Museum – Swiss History Blog* (blog), February 20, 2018, <https://blog.nationalmuseum.ch/en/2018/02/ermeth-computer-made-in-switzerland/>; Tobias Wildi and Andreas Nef, “Informatik an der ETH Zürich 1948–1981. Zwischen Wissenschaft und Dienstleistung,” in *Computergeschichte Schweiz – Eine Bestandesaufnahme*, ed. Peter Haber (Zurich: Chronos), 9–58; Adrian Knoepfli, “Logitech,” in *Historisches Lexikon der Schweiz* (HLS), version of October 21, 2018. Online: <https://hls-dhs-dss.ch/de/articles/055500/2018-10-21/>.

In the 1980s, the computer was suddenly everywhere, in homes, in small offices, and on the educational agenda. General availability called for a certain level of computer literacy to operate, and to work or play with the computer. This also applied to Switzerland. People now needed (and wanted) to know about the computer, what it was and how it could be used for gaming, working or daily administration. Computer education was on the political agenda and was also a major concern of teachers' associations and other educational stakeholders in Switzerland and beyond.<sup>25</sup> In this context, even a Swiss educational computer called "Smaky" was developed, which in the French-speaking part of Switzerland for a time rivalled the popular Apple products.<sup>26</sup>

### Special hardware

Long before the advent of the microcomputer, Swiss disability organisations realised that electronic computers could open up new opportunities for their clientele. In 1970, the "*Office romande d'integration pour handicapés*" reported on, already, seven years of training of clients with physical disabilities. After the organisation had decided to implement electronic data processing, an IBM minicomputer was used here, which took up less space than earlier mainframes and cost considerably less.<sup>27</sup> Minicomputers were smaller and cheaper than mainframes, but unlike the later microcomputers (home computers, personal computers, etc.), they were not yet suitable and affordable for home use.<sup>28</sup>

Swiss media published detailed reports on single cases and general developments in computerised work for people with disabilities.<sup>29</sup> With the advent of the microcomputer, the discussion about computers and disabilities then gained momentum. While members of the state authorities and teachers' associations were still puzzling over why and to what end computers in public schools should be used, it seemed easy to spot promising applications for children and adults with physical disabilities.<sup>30</sup>

Starting with very rudimentary devices in the late 1970s, different organisations helped to develop scalable products for different contexts or uses and different disabilities over time. As with computer literacy, the impetus for innovation came from the French-speaking part of Switzerland. At the end of the 1970s, the *Castalie Centre Médico-Éducatif* in Monthey, near Lake Geneva, was experimenting with electronic aids that could be used to control lights and motors via switches. The design of this equipment was also suitable for use by children. In 1982, a member of staff at the centre acquired a computer for himself and started developing software for people with disabilities. In

25 Michael Geiss, "Computer Education in Switzerland: Politics and Markets in a Highly Decentralized Country," in *How Computers Entered the Classroom, 1960–2000*, edited by Carmen Flury and Michael Geiss (Berlin: De Gruyter Oldenbourg, 2023), 147–70.

26 Fabian Grütter, "The Smaky School Computer. Technology and Education in the Ruins of Switzerland's Watch Industry, 1973–1997," *Learning, Media and Technology* 49, no. 1 (2024), 49–62; Geiss (2023).

27 "Der Computer im Dienst körperlich Behinderter," *Neue Zürcher Nachrichten*, October 10, 1970.

28 Haigh and Ceruzzi (2021), 90–96.

29 "Blinde als Programmierer," *SVEA-Nachrichten*, May 7, 1975; see also the reports in "MIXTURA," *Die Tat*, March 18, 1966; "MIXTURA," *Die Tat* May 8, 1971; "Computer-Fernkurse für Blinde," *Bieler Tagblatt*, November 11, 1971; "Berufsausbildung," *Wir Brückenbauer*, February 25, 1972.

30 Riccardo Bonfranchi, "Informatik in der Heil-, Sonder- und Sozialpädagogik: Was bringt der Computer Behinderten?" *Schweizer Heimwesen: Fachblatt VSA* 63, no. 4 (1992), 231–37.

1984, the centre acquired its first computer, and the following year established an expert group of teachers to study and train in the use of computers for children with disabilities. Parents of children with disabilities in the region also began to take an interest.<sup>31</sup>

However, the opportunities that the use of computers could open up for people with disabilities were not only seen by disability organisations and educational institutions for children with disabilities and their parents. Members of the Swiss disability rights movement, which in other cases were highly critical of recent technological developments, also carefully weighed up the pros and cons of electronics and computer-based technologies. They saw advantages, for example, when wheelchairs now could be better controlled and other everyday devices could be made easier to use by people with physical disabilities. In addition, input and output speech devices seemed to provide completely new communication opportunities for people with severe disabilities. However, members of the Swiss disability rights movement, like many others in the 1980s, were also deeply concerned about being rationalised away by automation.<sup>32</sup>

In 1982, a new historical actor appeared on the Swiss scene who was particularly committed to providing technological aids for children and adults with disabilities. At the end of 1982, the *Fondation suisse pour les Téléthèses* was established by the Swiss Paraplegics Foundation in Basel and the Swiss Foundation for Children with Cerebral Palsy (Cerebral Foundation) in Berne. The *Téléthèses* foundation was based in Neuchâtel and specialised in the development and testing of electronic tools for people with physical disabilities.<sup>33</sup> Jean-Claude Gabus served as the Foundation's Executive Director.<sup>34</sup> Gabus was born in 1950 and grew up in Le Locle. He then studied at the *Technicum in La Chaux-de-Fonds*. In the 1970s, Gabus helped to develop "CARBA-LINGUADUC," an assistive tool which could be operated using the tongue, for example to call a nurse. Gabus remained active as Executive Director at the *Téléthèses* Foundation until his death in 2003, helping to develop and disseminate various applications for people with disabilities and building strong networks in Switzerland and beyond.<sup>35</sup>

At the time, electronic aids for children and adults with disabilities were not suitable for mass production as the solutions had to be tailor-made and could not be commercialised. The newly established *Téléthèses* Foundation was therefore funded by grants and donations, and received input directly from users and special education institutions. The devices developed by the foundation ranged from conventional electronic aids to computer-based tools. From the outset, the *Téléthèses* Foundation also developed aids especially for (or adapted to) children to enable them to participate more fully in social and educational life.<sup>36</sup>

31 "Informatique et handicapés," *Le nouvelliste*, October 9, 1986; see on home computers like the Commodore Gleb J. Albert, "Der vergessene 'Brotkasten': neue Forschungen zur Sozial- und Kulturgeschichte des Heimcomputers," *Archiv für Sozialgeschichte* 59 (2019), 495–530.

32 Linus Flüeler, "Behinderte und Computer," *Puls: Drucksache aus der Behindertenbewegung* 28, no. 3 (1986), 45–48.

33 ["Fondation suisse pour les Téléthèses,"] *FAN – L'express*, May 31, 1983.

34 *Schweizerisches Handelsamtsblatt* 101, no. 105 (1983), 1566.

35 "B.A.Bar orphelin," *L'impartial*, March 20, 2003, 3; Élisabeth Cataix-Nègre, *Communiquer autrement: accompagner les personnes avec des troubles de la parole ou du langage: les communications alternatives*, 2<sup>nd</sup> ed. (Louvain-la-Neuve: De Boeck, 2017), 29.

36 "Fondation suisse pour les téléthèses," *La liberté*, September 19, 1984, 113.

The term “*Téléthèses*” was a made-up word used to describe an extended form of prosthesis that was not worn on the body but was intended to replace or support a human function. The microcomputer became a particularly interesting device in this context, but it had to be augmented with a number of additional instruments so that it could be operated by people with severe physical disabilities. For many of those, a keyboard was not suitable as an input device and alternative input aids were needed. However, the *Téléthèses* Foundation also developed its own microprocessor-controlled tools like the “Hector” speech computer. “Hector” was designed to give children and adults a voice who could not articulate or could only articulate with great difficulty. It was connected to an output device that was able to produce a synthesised voice. Output on a screen or via a printer was also possible.<sup>37</sup>

The “Hector” speech computer attracted a lot of public attention and was even featured on Swiss television in a report showing its use in the classroom by children.<sup>38</sup> It was designed for adults and children with severe motor disabilities. A special keyboard was available for “Hector,” which could also be equipped with pictograms if someone was unable to read and write. The first four “Hector” prototypes were used in 1984 in Zurich, Lucerne, Lausanne and La Chaux-de-Fonds. The aim of this early phase was to demonstrate the benefits of “Hector” so that the costs would be covered by Swiss disability insurance in the future.<sup>39</sup>

“Hector” was also the big attraction at a congress in Interlaken in 1986, which focused on the role of new technologies in special education. The congress had been organised by the Swiss Society for Special Education (*Schweizerische Heilpädagogische Gesellschaft*) and supported by the European Association for Special Education. According to press reports, over 300 people from Switzerland and abroad took part. In the view of one of the organisers, the reluctance to use computers for instructional purposes in special education was due to the fact that although the hardware was available, the necessary software was still lacking.<sup>40</sup>

The euphoria reported by congress participants was not shared by everyone. At the 1986 congress, Gabus had presented his tool for the first time to a larger public including academic experts. His practice-oriented talk was followed by a practical presentation by a person with severe speaking disabilities as well as the head of a school for children with cerebral palsy in the city of Zurich, who also reported on his experience with “Hector.” Criticism came particularly from academic special education. The critique neither targeted the technical shortcomings of “Hector” and other voice output tools nor the unavailability of the software, but centred on the lack of a sound educational concept for the implementation of new computer-based technologies. From a professional and institutional perspective, however, the *Téléthèses* Foundation

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37 Heinz Moser, “Sprechen mit ‘Hector,’” *Schweizer Schule* 73, no. 9 (1986), 27–29.

38 Karussell, “Sprach-Computer” aired 11 March 1985, SRF, <https://www.srf.ch/play/tv/karussell/video/sprach-computer?urn=urn:srf:video:76bab1f3-a42c-4e84-af88-719f3c5cc575>.

39 “Sprechender Computer für Behinderte,” *Neue Zürcher Zeitung*, March 1, 1985.

40 “Computer helfen den behinderten Menschen,” *Freiburger Nachrichten*, October 1, 1986.

did seem to fulfil a need: 30 educational institutions in Switzerland already reported that they were planning to implement “Hector.”<sup>41</sup>

Research on “Hector” was generally welcomed by Gabus and the *Téléthèses* Foundation. Andreas Bächtold, a professor at the Institute for Special Education at the University of Zurich, took general excitement around “Hector” as an opportunity to set up a pilot study group to evaluate the tool from a scientific perspective. In collaboration with a team of researchers from Neuchâtel, the Zurich pilot project was to focus on two aspects in particular: the linguistic challenges of using “Hector” and the language development of children with a speech disability.<sup>42</sup>

Both the feedback from the field and the initial scientific findings were implemented into the revised version of “Hector.” The developers had programmed the first version of “Hector” in BASIC, the rather simple and not very powerful “Beginner’s All-purpose Symbolic Instruction Code” programming language developed at Dartmouth College in the USA. The second version of “Hector” was programmed in machine language and was therefore able to process signals much faster. Instead of 900 words or speech acts, 2,100 separate outputs could now be stored, of which 700 had already been defined in advance by the developers. Applied linguistics experts from Neuchâtel had analysed the types of common usage and identified the most important words or speech acts that should be available to all users. It was also possible to adapt the tool to children and adults who needed a simpler device. Finally, the main controls were adapted for the second version: the device no longer had 25 main commands, but only five.<sup>43</sup>

In the public debates around “Hector,” people with disabilities had appeared in three roles: as users of the new tools, as participants in scientific studies, or in public demonstrations of the potential of the devices. In 1987, the editors of the magazine *Puls*, the main Swiss publication of the disability rights movement, now asked their readers to comment on computer-based technologies and report their experiences. In particular, the readers were asked to what extent everything that now seemed possible was also desirable, and what this meant for the role of conventional analogue aids.<sup>44</sup>

It was, however, a different debate on new technologies that dominated in publications of the Swiss disability rights movement at the time: the controversies around prenatal diagnostics and eugenics. With scientific progress in this area, members of the disability rights movement feared that the distinction between a life worth living and a life not worth living would become much more pronounced in the future. This debate even intensified and became more heated in the second half of the 1980s with the controversy surrounding the positions of the Australian philosopher Peter Sing-

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41 Margrit Balbi and Andreas Bächtold, “HECTOR – ein neuer Fall für die Sonderpädagogik?” *Travaux neuchâtelois de linguistique*, no. 12 (1987), 99–114.

42 Ibid.; René Jeanneret, “HECTOR, problèmes lexicaux,” *Travaux neuchâtelois de linguistique*, no. 12 (1987a), 41–62; René Jeanneret, “La téléthèse de communication HECTOR,” *Travaux neuchâtelois de linguistique*, no. 12 (1987b), 9–12. Bächtold’s pilot study was followed by an extensive project funded by the Swiss National Science Foundation (SNSF). See Evi Graf and Stefan Weber, *Lautsprachbehinderte Zerebralparetiker: Kognition, Sprache und technische Kommunikationshilfsmittel* (Bern: Lang, 1992).

43 Véronique Züllli, “HECTOR II,” *Travaux neuchâtelois de linguistique*, no. 12 (1987), 121–22.

44 Jiri Gajdorus, “Vorschau: Hilfsmittel,” *Puls: Drucksache aus der Behindertenbewegung* 29, no. 6 (1987), 31.

er.<sup>45</sup> A sceptical attitude also accompanied some of the publications from the disability rights movement on computers and other technologies. Experience, human interaction, understanding and optimism seemed to be in danger of being lost in favour of the benefits of rationalisation. The criticism was directed at a highly formalised social life in which people, with their needs, challenges and aspirations, were no longer at the centre – the computer, when used for anything other than accounting or administrative routines, seemed a harbinger of this dystopia.<sup>46</sup>

The more specific statements from members of the disability rights movement on specialised computer-based technologies for people with a physical disability were, however, less dismissive. In one of the responses to *Puls* magazine's call for comments on new technical aids, Heidi Huber described the new possibilities "Hector" had opened up for her. Suddenly she had been able to communicate in a way not imaginable before. She no longer had to cope with the projections of those around her but could express her thoughts herself. Huber described how she first had to learn how to use the new technology and build a relationship with it. Despite the human name, she did not consider "Hector" to have a personality of its own but simply saw it as an intermediary for her wishes, thoughts and feelings. Huber even turned one of its technical disadvantages into an advantage: unlike people without a speech disability, users of "Hector" always had to think first about what they wanted to say before starting to talk. Susanne Schriber, a member of *Puls*' editorial team, was less enthusiastic about the new electronic aids, but also stressed that they were a great step forward in the lives of people with physical disabilities.<sup>47</sup>

"Hector" was expensive. In 1988 it cost between 14,000 and 19,000 Swiss francs, which would be between 21,000 and 29,000 Swiss francs today (2025). Disability insurance (social welfare) now supported the purchase of "Hector" if it could be shown that the device was necessary to communicate with other people. Customers, however, were also found in France, Italy and West Germany. In addition to "Hector," the *Téléthèses* Foundation developed a second much cheaper device, which was widely used. This tool was called "James" and was an infrared remote control that could store 234 command functions. For people who were not able to use their fingers to operate the remote control, additional devices were available to give commands using the tongue or breath pressure.<sup>48</sup>

### Educational software as a policy issue

"Hector" and "James" were hardware solutions for people with physical disabilities. They aimed to make everyday life easier for children, young people and adults, and to increase their social, professional or educational participation. Without advances

45 Brian McGowan, "Die Zeitschrift PULS – Stimme aus der Behindertenbewegung," in *PULS – Druck-Sache aus der Behindertenbewegung. Materialien für die Wiederaneignung einer Geschichte*, edited by Erich Otto Graf, Cornelia Renggli, and Jan Weisser (Zurich: Chronos, 2011), 13–73.

46 P. Klöckler, "Achtung: Sozialtechnologien im Anmarsch!" *Puls: Drucksache aus der Behindertenbewegung* 29, no. 1 (1987), 20; Ruth Buchmann, "Professionelle Sozialarbeit total im Jahre 2000," *Puls: Drucksache aus der Behindertenbewegung* 29, no. 6 (1987), 20.

47 Susanne Schriber, "Telethesen: Prothesen für alte Hoffnungen," *Puls: Drucksache aus der Behindertenbewegung* 30, no. 1 (1988), 26–28.

48 "Im Dienste der Behinderten," *Neue Zürcher Nachrichten*, March 21, 1988.

in microprocessors, neither of these devices would have been possible. From the very beginning the educational use of “Hector” in schools and the target group of learners with disabilities played an important role in the *Téléthèses* Foundation’s mission. However, the tools were first designed without accompanying educational research and comprehensive instructional concepts.

In 1986, the *Téléthèses* Foundation embarked on another project for children, where it was even more difficult to find solid and sustainable solutions. This new project had again a catchy and easy to remember name: It was called “LOGIBABA.” Whereas the focus of “James” and “Hector” had been on hardware for people with physical disabilities, the new project was dedicated to learning software for people with intellectual disabilities and learning difficulties. According to a member of the project team, the acronym “LOGIBABA” stood for “*logiciels pour le B-A-BA des acquisitions*,” which can be translated as “software as the ABC for learning.”<sup>49</sup>

At the same time as “Hector” was attracting a lot of public attention, Gabus began to look for political support and to organise funding for a pilot project on learning software. The launch of a project dedicated to software for learners with intellectual disabilities was then made possible by a parent association, the *Fédération suisse des associations de parents d’handicapés mentaux* (FSAPHM). The pilot project was intended to help Gabus and his team at the *Téléthèses* Foundation to decide whether it was worth tackling the main software project at all.<sup>50</sup>

In order to realise the pilot project, the *Téléthèses* Foundation hired André Baechler, an employee of the *Castalie Centre Médico-Éducatif* in Monthey, in a part time capacity. At the time, members of the Castalie Centre had already written rudimentary software to be used by children or adults with intellectual disabilities, but Baechler thought the self-written software was too “amateurish” to be implemented on a broader scale. The aim of the pilot study was, however, not to perfect the software, but rather to prepare testing in other Swiss educational centres. A total of four educational institutions participated in the project, all based in French-speaking Switzerland. As part of the pilot study, five software programs were to be evaluated for their benefits and challenges. In addition, Baechler had already contacted a number of different researchers at universities in French-speaking Switzerland who would be available for advice and support.<sup>51</sup>

The participating educational institutions were sent a comprehensive questionnaire by the project manager to document their experiences with the software.<sup>52</sup> Both adults and children were part of the sample, which raised the question of whether it would be appropriate to work with the same software for both target groups. The project leader emphasised that such a project would only be worthwhile if it met actual

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49 Sylvie Grandguillot and Armin Murmann, “The Use of Computers in Special Education: The Example of French-Speaking Switzerland,” *International Journal of Sociology and Social Policy* 10, no. 4/5/6 (1990), 165–75; André Baechler, “Forum über die neuen Technologien im Dienste der geistig und mehrfach Behinderten,” *Schweizer Heimwesen: Fachblatt VSA* 62, no. 3 (1991), 187–88.

50 André Baechler, “Avant-projet FST et FSAPHM,” in *L’informatique, outil d’application pour handicapés physiques et mentaux: un inventaire des expériences en Suisse Romande* (Geneva: [éditeur non identifié], 1989), Annexe 1.1.

51 Ibid.

52 André Baechler, “Questionnaire expérimentation de logiciels, August 1987,” in *L’informatique, outil d’application pour handicapés physiques et mentaux: un inventaire des expériences en Suisse Romande* (Geneva: [éditeur non identifié], 1989), Annexe 1.2.

practical needs. Finally, he reported that all the participating institutions wanted the project to continue.<sup>53</sup>

For the larger follow-up project, decided on in 1988, the aim was to involve the other Swiss language regions as well and to find available software that already met the needs of the field and only needed to be adapted or translated. Only when the existing software was not sufficient did the project team want to develop new applications. All age groups should be considered, and a wide range of institutional settings should be taken into account. A minimum of three years was planned for the follow-up project, if only because of the rapid progress in technological development. For the *Téléthèses* Foundation, this meant a significant expansion of its portfolio. The software project was considered to be much more complex than the earlier endeavours. Until now, the Foundation's expertise had been in the field of hardware for people with physical disabilities. This is why the *Téléthèses* Foundation wanted to collaborate with partners in Switzerland who already had extensive experience in this field or who could bring new networks and expertise to the table. The project manager of the main project, again André Baechler, also saw the need to collaborate with national and cantonal universities, to use the services of private software developers if necessary, or to employ its own software developers. Regarding international expertise, the contacts that the *Téléthèses* Foundation had already established abroad should also be used for the "LOGIBABA" project. In terms of hardware, the appropriate devices were considered to be the Commodore 64, the Amiga 500 or the Amiga 2000. These machines were widely used and well known, they were relatively cheap, and a lot of useful software was already available.<sup>54</sup>

In 1984, when the Swiss Conference of Cantonal Ministers of Education (EDK) began to coordinate activities in the field of computer education in compulsory schools, special education or software and hardware for learners with disabilities did not yet play a role. In 1985, the EDK set up a working group on "Informatics in primary schools" and began to survey the current situation in the cantons, to inform cantonal actors and to develop guidelines. While significant progress had been made in the cantons in terms of hardware, there was a lack of the necessary software to enable effective computer-based teaching in the classrooms. In 1989, EDK decided to support and help establish a coordination centre dedicated to educational computing in Switzerland, the *Schweizerische Fachstelle für Informationstechnologien im Bildungswesen* (SFIB) at the *Film Institut*. The *Film Institut* had been one of the most important players in Switzerland in the twentieth century when it came to media literacy. Founded already in 1921, it was particularly involved in film education. The affiliated SFIB centre was now tasked with documenting the many initiatives in Switzerland dedicated to educational computing

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53 "Synthese de la réunion du 5 octobre 87 et des quatre questionnaires remplis par les institutions à l'issue de l'expérience de l'avant-projet: FST expérimentation de logiciels," in *L'informatique, outil d'application pour handicapés physiques et mentaux: un inventaire des expériences en Suisse Romande* (Geneva: [éditeur non identifié], 1989), Annexe 1.3.

54 "Projet F.S.T. – Développement et application de l'informatique comme soutien pédagogique auprès des handicapés mentaux;" "Projet FST LOGIBABA – L'informatique au service des handicapés et des jeunes enfants," in *L'informatique, outil d'application pour handicapés physiques et mentaux: un inventaire des expériences en Suisse Romande* (Geneva: [éditeur non identifié], 1989), Annexe 2.1, Annexe 2.2; André Baechler, "Développement et application de l'informatique comme soutien pédagogique auprès des déficients mentaux," *appel*, no. 2 (1988), 34–35.

and networking the key actors, documenting the existing software, dealing with legal issues and with the further development of educational media. The EDK also launched a multi-year plan with the aim of introducing a longer-term perspective for the use of information technology in schools. However, it saw itself primarily as a platform for coordination, documentation and networking. In a highly decentralised country like Switzerland, it could not guarantee the actual financial resources to implement new technologies on a larger scale. This money had to be provided by the cantons and municipalities, which were (and still are) responsible for compulsory education in Switzerland, both in terms of finance and control.<sup>55</sup>

In the first years of its coordination efforts in the field of computer-based education, EDK did not explicitly address computers in special needs education. Nor was there any dialogue between the EDK experts with those at the *Téléthèses* Foundation responsible for “Hector,” “James” and “LOGIBABA.” This changed at the end of the 1980s. While the “LOGIBABA” project was already running, several political actors finally started coordinating efforts in the area of computer use for children and adults with disabilities in Switzerland at the national level. EDK now helped establish a new working group that also included representatives of the *Schweizerische Heilpädagogische Gesellschaft* (SHG), a professional association established in 1889 and dedicated to special education. In 1989, the SHG provided opportunities for a more intensive exchange on computer use in special education in which both the regional and international developments in the field were discussed. At the end of the year, a symposium organised by the EDK brought the cantonal experts for the use of new information technologies in education up to date with developments in special needs education. The aim was now to set up a national cooperation to network the various experts. In the medium term, this network was to extend even beyond national borders.<sup>56</sup>

In the spring of 1990, representatives of the SHG, the *Schweizerische Zentralstelle für Heilpädagogik* (SZH) and the *Téléthèses* Foundation initiated a study group on “Informatics in Special Education,” in which other educational institutions and experts were also to participate. The aim of this study group was – again – to coordinate, network, document and inform, but also to initiate joint projects. The SZH, founded in 1972 as the Swiss coordination centre for special educational training institutions, was to become one of the important actors in the national establishment of the policy field of computer use by people with disabilities.<sup>57</sup>

The funds for the extension of the SFIB portfolio came from the *Schweizerische Stiftung für das cerebrale gelähmte Kind* (Foundation for the Cerebral Palsy Child). “LOGIBABA” became part of the SFIB’s activities portfolio in January 1991 and was fully integrated there on 1 September 1991. The Cerebral Foundation contractually

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55 Dominik Jost, “Informatikunterricht und Sonderpädagogik,” in *Congrès ‘Technologie et Handicap’: Publication des Actes*, edited by Schweizerische Stiftung Elektronischer Hilfsmittel für Behinderte (Neuchâtel: [éditeur non identifié], 1990), 124–134.

56 Jost (1990). Regarding the SHG, see the few historical details in Hans Brunner, “100 Jahre Schweizerische Heilpädagogische Gesellschaft: auf dem Wege von der Integration zum Mitmenschen- und Mitseelen-Sein,” *Schweizer Heimwesen: Fachblatt VSA* 60, no. 12 (1989), 805–806.

57 Jost (1990). Regarding the ‘Schweizerische Zentralstelle für Heilpädagogik’ (SZH) see Barbara Egloff, Alois Bürli and Romain Lanners, *50 Jahre SZH: von einer Vereinigung der Ausbildungsinstitute hin zum nationalen Kompetenzzentrum für inklusive Bildung* (Bern: Edition SZH/CSPS, 2023).

guaranteed its financial support until 1994. The *Téléthèses* Foundation was now to focus primarily on hardware development, adaptation and implementation. The SFIB was responsible for all matters relating to educational software. In order to make the transition as smooth as possible, the staff previously responsible for “LOGIBABA” were retained for a limited period. The SFIB was to act as a point of contact and advice for schools and parents of children with disabilities. The aim was to use the expertise and knowledge already built up within “LOGIBABA” for this purpose. In addition, the activities, which were still largely limited to French-speaking Switzerland, were to be extended to German-speaking Switzerland and Italian-speaking Ticino. SFIB guaranteed that the employee responsible for the special educational needs’ portfolio was at least bilingual.<sup>58</sup>

The transfer of the “LOGIBABA” project to the SFIB centre meant that activities would now be national in scope. However, this did not mean that there would be a significant increase in staff. The SFIB had to operate on a shoestring budget and only one person was responsible for all matters relating to special education.<sup>59</sup>

The following year, the SFIB took part in a special education congress in Davos, where it organised four seminars and more than 10 workshops. The centre now began issuing licences for educational software that could be used both in primary schools with young children and in special education settings.<sup>60</sup> It also ran two demonstration rooms for software, one in Zurich and one in Neuchâtel. French and German programs could be tested here. The SFIB repeatedly pointed out that the software installed was not only suitable for people with disabilities but could be used in all primary schools. Various hardware was available in the demonstration rooms, including a Macintosh and an IBM PC as well as an Amiga computer. The SFIB also published a bulletin dedicated to special education and organised training for teachers in the use of educational software in schools for people with disabilities.<sup>61</sup>

The complicated structure of public and private funding, and the involvement of several authorities at the national and inter-cantonal levels, made it difficult to develop a sustainable model for the SFIB coordination centre. From 1995, a new solution had to be found as the SFIB was evaluated and put on a new footing and the Cerebral Foundation had only agreed to provide initial funding.<sup>62</sup> However, the structure of the SFIB agency remained complicated. This reflected the challenges of educational governance in a system with almost no centralised control. The joint sponsorship of the SFIB by a federal authority, the *Bundesamt für Industrie, Gewerbe und Arbeit* (BIGA), and the EDK was extended. The Study Group on New Information Technologies in Special

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58 Jahresbericht SFIB 1990/1991 (StALU/A1572/578); SFIB Info 1/1991 (StALU/A1427/1661); Protokoll der Vorstandssitzung SFIB vom 20. Juni 1991 (StALU/A1427/1180).

59 Guido Buser, “Interview mit dem Leiter der SFIB,” *Interface*, no. 2, 8–9.

60 Protokoll der Vorstandssitzung SFIB vom Freitag, 2 Oktober 1992; Protokoll der Vorstandssitzung SFIB vom Dienstag, 16 Juni 1992, 9.00–12.00 Uhr; SFIB Info 3/1991 (StALU/A1427/1661).

61 Jahresbericht SFIB 1993 (StALU/A1453/135); Jahresbericht SFIB 1994 (StALU/A1453/556).

62 Protokoll der Vorstandssitzung SFIB vom Freitag, 22 April 1994 (StALU/A1453/135); Jahresbericht SFIB 1994 (StALU/A1453/556). The distinction between national and intercantonal initiatives highlights the complexity of educational governance in Switzerland. The three political levels – communal, cantonal, and national – are complemented by institutionalised intercantonal coordination efforts.

Needs Education of the EDK was dissolved at the end of 1995 and its tasks transferred to the SFIB. The special education portfolio was now financed by the SZH which had already been a member of the now dissolved study group. The SZH concluded a contract with the Film Institut, with which the SFIB continued to be part of.<sup>63</sup>

The transfer of the software portfolio from the *Téléthèses* Foundation to the SFIB Centre did not create any particular momentum in the 1990s. The nature and scope of the SFIB Centre's involvement in special education issues remained rather similar until the end of the millennium. Indeed, starting from the autumn of 1998, there was even a six-month gap in the special education dossier. The main task of the SFIB specialist in special education was to provide telephone and written advice to interested people who contacted the centre. The SFIB was also responsible for in-service training and events at educational institutions. The centre's own public events included inputs on developments related to special education. Conversely, the SFIB Centre also tried to be present at special education congresses and helped publishing books dedicated to computer use by people with disabilities. Finally, at the end of the millennium, it launched a special needs section on its website. The SZH remained on board as sponsor and contact for special education issues.<sup>64</sup>

In the 1990s, members of the disability rights movement were still ambivalent about the latest technological boon. In a published discussion between a group of people with disabilities and some experts for electronic aids in 1992, they saw the implementation of new devices and software as a "balancing act" between the pros and cons of technology use. The gains in autonomy for people with disabilities brought about by new technologies, particularly computer-based technologies, were welcomed, and even a glossary of the most important terms in the field of "assistive" technology was published in the main magazine of the Swiss disabilities' rights movement. At the same time, the panellists emphasised that there was no one-size-fits-all solution and sought to ensure that advanced technologies did not become a barrier, but that the wishes, needs, and life plans of people with disabilities were at the centre of all future developments.<sup>65</sup>

## Concluding Remarks

Computers held both promise and threat for people with disabilities. On the one hand, computer-based technologies seemed to offer many opportunities to improve social, economic and educational participation. Depending on the nature of the disability, computerised workstations seemed to facilitate access to the labour market. Speech computers offered new ways for people with severe speech disabilities to interact with their environment and reduce dependency on others. Early forms of online communication promised to enable people with motor disabilities to travel long distances in a

63 EDK Jahresbericht 1995, 50–51; Jahresbericht SFIB 1995 (StALU/A1453/556).

64 Jahresbericht SZH 1999, p. 15; Riccardo Bonfranchi, ed., *Wir können mehr als nur Schrauben verpacken. Der Einsatz des Computers bei Menschen mit geistiger Behinderung*. Medien und Bildung 1 (Bern: Film Institut, 1995); Elisabeth Schweizer and René Albertin 'Jetzt bin ich dran...'. *Handreichung für den Computereinsatz in der Schule*. Medien und Bildung 2 (Bern: Film Institut, SFIB, CBT Schweiz, 1995).

65 "Gratwanderung ins Hightech-Paradies: Gespräch mit Bernhard Rüdüsili Hofmann, Röbi Kohli, Heinz Bossert und Daniel Brönnimann," *Puls: Drucksache aus der Behindertenbewegung* 34, no. 3 (1992), 21–27; "Lexikon aus Cyberland," *Puls: Drucksache aus der Behindertenbewegung* 34, no. 3 (1992), 37–38.

short time, at least virtually, and educational software seemed to optimise learning for children and adults with intellectual disabilities. On the other hand, computers threatened to destroy jobs, increase individual productivity and thus worsen the economic participation of people with disabilities. From the perspective of social responsibility, it was seen as crucial to ensure that the use of computer technology did not finally become a constraint for children and adults with disabilities.

Which developments and outcomes were considered possible depended, however, not least on the economic and political contexts in which the various stakeholders operated. Like the United States, Switzerland has been characterised as a “liberal welfare state” in the now-classic Esping-Andersen terminology. Although clear trends toward the continental model have emerged in Switzerland since the 1970s, the welfare state retained many of its liberal features.<sup>66</sup> The same persistence (but also a slow adaptation to international standards) shows in the highly decentralised public education system with strong fiscal federalism, which significantly limits the possibilities for central control.<sup>67</sup> Accordingly, the development of assistive technologies for young learners and educational software for children and adults with disabilities in Switzerland was driven by bottom-up initiatives and soft inter-cantonal coordination.

As in the US, the initiatives in Switzerland were shaped less by utopian ideas and grand visions than by practical projects aimed at directly enhancing participation. Unlike the United States, however, Switzerland did not have large computer companies with dedicated internal disability departments or close ties to the disability rights movement. On this key point, developments in Switzerland differed significantly from those described by Petrick regarding the United States. The first endeavours were mainly driven by private disability organisations, foundations, educators and dedicated technical experts in French-speaking Switzerland. They, initially solely focused on hardware for people with physical disabilities, particularly voice computers and other “assistive” technologies. These seemed to offer great opportunities, especially for the education of people with disabilities.

While rapid successes and public attention were achieved in this area, the issue of educational software for people with intellectual disabilities proved to be much more complex. The dynamic field of software development did not seem to be able to be organised on a purely regional basis. Established actors and institutions in special education, along with Swiss disability organisations, therefore joined forces with inter-cantonal and national stakeholders who already had years of experience advocating for educational computing and computer-assisted instruction. However, this did not generate any particular momentum. The coordination efforts failed to sustain the dynamism that had characterised former regional and local initiatives. This is where the limitations of a weakly subsidised inter-cantonal coordination became evident, particularly in a complex field like the development and provision of educational software.

This article focused almost exclusively on the interventions and negotiations of established organisations in Switzerland. The role of people with disabilities in the development of new computer-based technologies or their experiences in using beta versions of new tools was not considered. This would require other historical sources

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<sup>66</sup> Trampusch (2010); Bonoli and Fossati (2023).

<sup>67</sup> Giudici and Emmenegger (2023).

and methodological approaches that would reveal the educational, social and economic role of computers in the lives of people with disabilities. The historical analysis presented here provides some starting points for such a follow-up study.

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## In the Shadows of the Iron Curtain: The Forgotten Legacy of Vygotsky's Defectology

Radu Harald Dinu & Laura-Elena Runceanu

*Abstract* • Vygotsky's ideas on disability, termed “defectology,” influenced special education in state-socialist countries but were marginalised in the West due to negative connotations and links to outdated welfare systems. This study reconstructs the conceptual history of Vygotsky's defectology and explores its neglect compared to his other work. It examines how his defectology shaped post-war educational approaches to disability and why his methods faced barriers in various countries. Using a mixed-methods approach, it combines a literature review with semi-structured interviews from 2024 with scholars in Germany, Romania, and Russia. Findings indicate that Soviet defectology diverged from Vygotsky's ideas after his death in 1934, contributing to their marginalisation. The study highlights ideological and practical challenges shaping the reception of Vygotsky's defectology in Eastern and Western contexts.

*Keywords* • Vygotsky, defectology, disability studies, special education

### Introduction and aims

Lev Semyonovich Vygotsky (1896–1934), renowned as one of the most influential psychologists of the twentieth century, experienced posthumous obscurity until the post-war period. Western scholars began translating and popularising Vygotsky's works in the 1960s; however, his significant contributions to disability studies and special education, gathered under the term defectology, remain obscured.<sup>1</sup> While the field of defectology and the profession of defectologists gained prominence in state socialist countries, in the West, the term faced discrediting due to negative connotations and perceived misalignment with allegedly progressive approaches to disability. As William McCagg put in 1989, the legacy of defectology is “puzzling” for many as it seemingly “incorporates negative attitudes toward the disabled that would not survive for three minutes in a discussion of the handicapped in the Western world today.”<sup>2</sup> Alex Kozulin

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1 Robert W. Rieber and Aaron S. Carton, eds., *The Collected Works of L.S. Vygotsky: Volume 2: Fundamentals of Defectology (Abnormal Psychology and Learning Disabilities)* (New York: Plenum Press, 1993).

2 William O. McCagg, “The Origins of Defectology,” in *The Disabled in the Soviet Union: Past and Present, Theory and Practice*, ed. William O. McCagg and Lewis H. Siegelbaum (Pittsburgh: University of Pittsburgh Press, 1989), 40.

and Boris Gindis have similarly argued that “a foreign observer would not be able to understand the nature of Russian ‘defectology’ out of the context of Vygotsky’s ideas.”<sup>3</sup>

This article aims to reconstruct the intricate conceptual history of Vygotsky’s defectology and explores why this legacy remained relatively neglected compared to his other prominent studies. Through a literature review and semi-structured interviews, we illuminate this overlooked legacy without aiming for definitive conclusions or generalisability. Instead, we seek to enhance understanding of Vygotsky’s defectology, its reception, and to inspire further discussion. To reconstruct Vygotsky’s legacy as described above, our study will be guided by the following research questions:

- How has the dissemination of Lev Vygotsky’s works on defectology influenced scholarly approaches to disability since the post-war period?
- In what ways did the reception and integration of Vygotsky’s defectology differ among state-socialist and liberal-democratic countries during the post-war period, particularly in Germany, Romania, and Russia?
- What were the main barriers and facilitators to the adoption of Vygotsky’s approach to disability in special education and disability studies from the post-war period onwards?

### The conceptual roots of Vygotsky’s defectology

Vygotsky’s biography and intellectual evolution have been extensively documented elsewhere and cannot be fully addressed here, but a few remarks on his defectological writings are essential.<sup>4</sup> The term defectology was already employed in pre-revolutionary Russia, having been introduced by the Russian child psychologist Vsevolod Kashchenko (1870–1943), who was strongly influenced by German curative pedagogy (*Heilpädagogik*).<sup>5</sup> However, Vygotsky’s sociocultural outlook on education in general, and on disability in particular, diverged significantly from that of the “old guard” of Russian psychologists, who overemphasised biological or hereditary factors. Vygotsky distanced himself from paradigms that focused on “correcting” children inspired by orthopaedic metaphors such as “corrective pedagogy” (*korrektsionnaia pedagogika*). Instead, he emphasised the pivotal role of social relations over the notion of “curing” disabilities.<sup>6</sup> In contrast to the contentious terminology he employed, such as “diffi-

3 Alex Kozulin and Boris Gindis, “Sociocultural Theory and Education of Children with Special Needs: From Defectology to Remedial Pedagogy,” in *The Cambridge Companion to Vygotsky*, ed. Harry Daniels, Michael Cole and James V. Wertsch (Cambridge: Cambridge University Press, 2007), 334.

4 Anton Yasnitsky, *Vygotsky. An Intellectual Biography* (Abingdon: Routledge, 2018); René van der Veer, *Lev Vygotsky* (London: Continuum, 2007); Alex Kozulin, *Vygotsky’s Psychology: A Biography of Ideas* (Cambridge, MA: Harvard Univ. Press, 1999).

5 McCagg (1989), 48.

6 Andy Byford, *Science of the Child in Late Imperial and Early Soviet Russia* (Oxford: Oxford University Press, 2020), 164.

cult children" (*trudnye deti*),<sup>7</sup> or child "primitivism,"<sup>8</sup> which are products of their time, Vygotsky's ideas principally departed from the above-mentioned deficit-oriented perspective. Envisioning the idea of disability as diversity, and challenging notions of normality and abnormality, Vygotsky emphasised, for instance that "a child whose development is impeded by a defect is not simply a child less developed than his peers but is a child who has developed differently."<sup>9</sup> Embracing a perspective on disability that was deeply intertwined with the cultural-historical framework he developed alongside his associates such as Alexandr Luria, Vygotsky asserted that "in psychology and in pedagogy the problem of a child's handicap must be posed and comprehended as a social problem, because the social aspect formerly diagnosed as secondary and derivative, in fact, turns out to be primary and major,"<sup>10</sup> thus anticipating the social model of disability.<sup>11</sup>

Moreover, Vygotsky criticised the medical gaze, opposing the use of mental tests to measure children's disabilities and advocating for a qualitative, holistic approach.<sup>12</sup> Although influenced by broader Western scholarship, he also critiqued pre-revolutionary "bourgeois" approaches to disability, which he called the "philanthropic, invalid-oriented point of view."<sup>13</sup> Instead, he promoted a future-oriented, utopian perspective where disabled individuals would develop to the point that their impairments would no longer be distinguishable: "If we create such a country... where blindness will not mean abnormality, then blindness will not be seen as a handicap there."<sup>14</sup> As van der Veer and Valsiner have emphasised, these notions of social progress "could be easily combined with the prevailing Soviet ideology of the plasticity of human beings and the idea of the 'new man.'"<sup>15</sup> But despite affinities with the Soviet project, Vygotsky's work fell into obscurity after his death in 1934, remaining so until the end of Stalin's

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7 Lev S. Vygotsky, "Difficult Children," in *Vygotsky's Notebooks: A Selection*, ed. Ekaterina Zavershneva and René van der Veer (Singapore: Springer), 437–58.

8 Lev S. Vygotsky, "Introduction. Fundamental Problems of Defectology," in *The Collected Works of L.S. Vygotsky: Volume 2: Fundamentals of Defectology (Abnormal Psychology and Learning Disabilities)*, ed. Robert W. Rieber and Aaron S. Carton (New York: Plenum Press, 1993a), 43–45.

9 Vygotsky (1993a), 30.

10 Lev S. Vygotsky, "Principles of Education for the Deaf-Mute Child," in *The Collected Works of L.S. Vygotsky: Volume 2: Fundamentals of Defectology (Abnormal Psychology and Learning Disabilities)*, ed. Robert W. Rieber and Aaron S. Carton (New York: Plenum Press, 1993d), 112.

11 Peter Hick, "Reframing Psychology for Inclusive Learning within Social Justice Agendas," in *Psychology for Inclusive Education New Directions in Theory and Practice*, ed. Peter Hick, Ruth Kershner, and Peter Farrell (London: Routledge, 2009), 169.

12 René van der Veer and Jaan Valsiner, *Understanding Vygotsky. A Quest for Synthesis* (Oxford: Blackwell, 1994), 58.

13 Lev S. Vygotsky, "The Psychology and Pedagogy of Children's Handicaps," in *The Collected Works of L.S. Vygotsky: Volume 2: Fundamentals of Defectology (Abnormal Psychology and Learning Disabilities)*, ed. Robert W. Rieber and Aaron S. Carton (New York: Plenum Press, 1993b), 75.

14 Lev S. Vygotsky, "The Blind Child," in *The Collected Works of L.S. Vygotsky: Volume 2: Fundamentals of Defectology (Abnormal Psychology and Learning Disabilities)*, ed. Robert W. Rieber and Aaron S. Carton (New York: Plenum Press, 1993c), 93.

15 van der Veer and Valsiner (1994), 77.

regime. Some scholars challenge the narrative of a “Vygotsky ban,”<sup>16</sup> arguing instead that this decline was primarily due to Vygotsky’s early death and publication constraints within the field of pedology,<sup>17</sup> pointing to the so-called “Pedology Decree” a decision from 1936, in which the Central Committee enunciated “pedological distortions.”<sup>18</sup> Irrespective of these historical intricacies, Vygotsky’s works remained obscure until the post-war period, when his legacy gradually resurfaced in both East and West.<sup>19</sup> Vygotsky’s defectological writings from the 1920s and 1930s were first comprehensively translated into English in 1993, alongside posthumous, undated, and previously unpublished manuscripts.<sup>20</sup> Van der Veer and Valsiner conclude that “Vygotsky’s defectological writings formed an important and integral part of his whole theoretical approach.”<sup>21</sup>

### Data collection process and terminology

In this study, we employed a mixed-method approach, integrating a literature review with semi-structured interviews. The literature review followed PRISMA guidelines for systematically screening studies and it draws upon the most utilised databases in the fields of education, psychology, history and disability studies.<sup>22</sup> The search terms were “Vygotsky” and “Defectology” with the equivalent translation in Swedish, German, French and Romanian. Accordingly, various truncations, such as “defectolo\*” were employed to ensure a comprehensive search. Studies published in scholarly journals between 1974 and 2024 were reviewed, with 1974 selected as the start date because it marks the earliest relevant article found based on our criteria.

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16 Jennifer Fraser and Anton Yasnitsky, “Deconstructing Vygotsky’s Victimization Narrative: A Re-Examination of the ‘Stalinist Suppression’ of Vygotskian Theory,” *History of the Human Sciences*, no. 2 (2015), 128–53.

17 In the early Soviet Union, “pedology” was a multidisciplinary field that combined elements of psychology, education, and child development to scientifically study children. The field emerged as part of a broader attempt to apply scientific principles to various aspects of social life, including education. See: Byford (2020).

18 Irina Sirotkina and Roger Smith, “Russian Federation,” in *Oxford Handbook of the History of Psychology*, ed. David B. Baker (Oxford: Oxford University Press, 2012), 413; Jane E. Knox and Carol Stevens, “Vygotsky and Russian Defectology. An Introduction,” in *The Collected Works of L.S. Vygotsky: Volume 2: Fundamentals of Defectology (Abnormal Psychology and Learning Disabilities)*, ed. Robert W. Rieber and Aaron S. Carton (New York: Plenum Press, 1993), 7; Kozulin (1999), 243.

19 For a comprehensive and critical discussion of the “Pedology decree,” see: Byford (2020), 248–54.

20 A translation of Volume 5 from the six-volume series published in Russian between 1982 and 1984.

21 van der Veer and Valsiner (1994), 76–77.

22 APA PsycInfo, Cinahl with Full Text, Education Collection, MEDLINE, SCOPUS, Sociological Abstracts, Web of Science Core Collection, SwePub, SHBd - *Svensk historisk bibliografi* (Swedish historical bibliography).

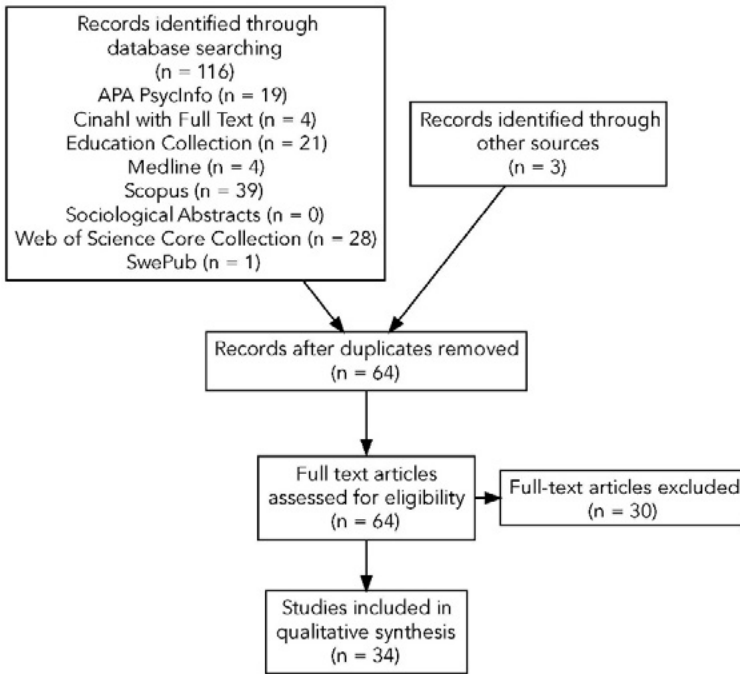


Figure 1. PRISMA flow diagram

The initial search resulted in 116 records. After the initial review, 71 records were transferred to Rayyan for title and abstract (TIAB) screening and for conducting a double-blind evaluation. After possible duplicates were resolved the remaining 64 records were evaluated for inclusion and exclusion criteria. The inclusion criteria were: 1. Studies must involve Vygotsky and his work in defectology; 2. Studies must be in English, Swedish, French, and Romanian. The exclusion criterion was studies on topics other than Vygotsky and his work in defectology. After having conducted a double-blind evaluation, 31 records were included in the literature review. Given the limitations of these databases – such as their temporal constraints and the exclusion of other types of publications from their indexes – we manually added three records identified from other sources to our literature review, bringing the total to 34 records (See Fig. 1).<sup>23</sup>

<sup>23</sup> We extend our sincere gratitude to Paola Violasdotter Nilsson for her invaluable assistance in conducting searches and systematically selecting the relevant articles with professional expertise.

Table 1. List of selected papers.

Author(s), year	Title
Ajdinski, Ljupco, and Lani Florian (1997)	Special Education in Macedonia
Bøttcher, Louise, and Jesper Dammeyer (2012)	Disability as a Dialectical Concept: Building on Vygotsky Defectology
Bøttcher, Louise, and Jesper Dammeyer (2013)	Disability as a Risk Factor? Development of Psychopathology in Children with Disabilities
Bøttcher, Louise (2021)	Supporting Unusual Development through Moral Imagination
Cook, Leslie S., and Peter Smagorinsky (2014)	Constructing Positive Social Updrafts for Extranormative Personalities
De Rezende Mendonça, Fabiana Luiza et.al (2020)	Mediation in the Classroom in the Construction of Knowledge in Inclusive Schools
De Souza, Flávia Faissal, and Débora Dainez (2022)	Defectology and School Education: Implications for the Human Rights Field
Ferreira, Marcello, et al. (2023)	Time and Cognitive Development: From Vygotsky's Thinking to Different Notions of Disability in the School Environment
Gindis, Boris (1995)	The Social/Cultural Implication of Disability: Vygotsky's Paradigm for Special Education
Gindis, Boris (1995)	Viewing the Disabled Child in the Sociocultural Milieu: Vygotsky's Quest
Gindis, Boris (1999)	Vygotsky's Vision: Reshaping the Practice of Special Education for the Twenty-First Century
Günther, Klaus B. (2011)	Zur Bedeutung Lev Semjonovic Vygotskijs für die 'Defektologie' im Allgemeinen und die 'Surdopädagogik' im Besonderen
Hausstätter, Rune, and Stine Vik (2021)	Inclusion and Special Needs Education: A Theoretical Framework of an Overall Perspective of Inclusive Special Education
Holowinsky, Ivan Z. (1988)	Vygotsky and the History of Pedology
Joubert, Roelien, and Ingrid Harrington (2020)	Inclusive Education: Origins, 'Defectology', and Kosovo's Experiences of Inclusive Education
Knox, Jane, and Alex Kozulin (1987)	Vygotskian Tradition in the Psychological Study of Handicapped, Particularly Deaf Children
Kozulin, Alex, and Boris Gindis (2007)	Sociocultural Theory and Education of Children with Special Needs: From Defectology to Remedial Pedagogy

- Kravtsova, Elena E. (2010) In Memoriam: Gita L'vovna Vygodskaya
- Lubovsky, Vladimir I. (1974) Defectology: The Science of Handicapped Children
- Mecacci, Luciano (2021) Vygotsky and Psychology as Normative Science
- Paul, Peter V. (2023) Perhaps This Is Everything You Wanted to Know About Vygotsky, but Were Afraid to Ask
- Pedagogika Editorial Staff (1983) L. S. Vygotsky and Contemporary Defectology
- Potier, Katie R., and Heidi Givens (2023) Synthesizing Vygotsky's Sociocultural Theory and Deaf Pedagogy Framework toward Deaf Education Reform: Perspectives from Teachers of the Deaf
- Sandomirskaja, Irina (2019) Das blinde Kind: Lew Vygotskijs Defektologie als poetische und politische Allegorie
- Skyer, Michael E. (2020) Invited Article: The Bright Triad and Five Propositions: Toward a Vygotskian Framework for Deaf Pedagogy and Research
- Skyer, Michael E. (2023) Vygotskian Perspectives in Deaf Education: An Introduction in Two Movements
- Smagorinsky, Peter (2012a) Every Individual Has His Own Insanity: Applying Vygotsky's Work on Defectology to the Question of Mental Health as an Issue of Inclusion
- Smagorinsky, Peter (2012b) Vygotsky, 'Defectology,' and the Inclusion of People of Difference in the Broader Cultural Stream
- Smagorinsky, Peter, and Merida Lang (2023) Learning to Create Environments for Deafness among Hearing Preservice Teachers: A Defectological Approach
- van der Veer, René, and Ekaterina Zavershneva (2011) To Moscow with Love: Partial Reconstruction of Vygotsky's Trip to London
- Willicheva, Kristina, and Wyatt C. Hall (2023) From Vicious Circles to Virtuous Cycles: Vygotskian-Inspired Conclusions for Biomedicine and Deaf Education
- Yasnitsky, Anton (2011) Lev Vygotsky: Philologist and Defectologist, a Sociointellectual Biography
- Zaitseva, Galina, Michael Pursglove, and Susan Gregory (1999) Vygotsky, Sign Language, and the Education of Deaf Pupils
- Zaretskii, Viktor K. (2016) Vygotsky's Principle 'One Step in Learning - One Hundred Steps in Development': From Idea to Practice

The semi-structured interviews aimed to uncover nuances in the reception of Vygotsky's work that might not emerge from a literature review alone. Conducted in 2024, these interviews involved six senior scholars in special education or psychology – two from Germany, one from Romania, and three from Russia – all with expertise in Vygotsky's defectology. All respondents are or have been university researchers, with expertise ranging from extensive publications on defectology to substantial teaching experience and collaboration with practitioners in special education or psychology. Our selection combined convenience and purposive sampling: while Vygotsky specialists are numerous, few have deep knowledge of his defectological writings. Thus, all respondents were chosen based on their extensive engagement with this aspect. Additionally, we included scholars from both Eastern and Western Europe to highlight Vygotsky's influence beyond the former state socialist countries. The aim was not to achieve representativeness or generalisability – unfeasible with a small sample or respondents – but rather to deepen our analysis and add an additional layer of complexity to the literature review. Including scholars from three countries enriched, rather than fragmented, our study by capturing diverse academic traditions. Russia's inclusion was essential for engaging with Vygotsky's work in its original linguistic and cultural context, while Germany and Romania were selected partly for practical reasons, as our fluency in these languages facilitated both literature integration and interviews. Our initial aim was to include Swedish scholars, but as Roger Säljö observed, the lesser-known status of Vygotsky's defectological writings in Sweden compared to concepts such as the zone of proximal development led to the absence of identified Swedish scholars in this area: "Vygotsky devoted much time to defectology, and this term has likely deterred many from connecting with this particular aspect...many [Swedish scholars] have been alienated by the term defectology."<sup>24</sup>

Most interviews were conducted online, each lasting about an hour, while two respondents preferred to provide written answers. All participants were fully informed about the study's scope and gave their consent beforehand. To maintain confidentiality, all interviewees were assigned pseudonyms, and the recordings and transcripts were securely stored on the university's server in accordance with GDPR and the Swedish Research Council's ethical guidelines. The authors handled all translations into English. We conducted a thematic analysis of both the literature review and the interview transcripts, adhering to Braun and Clarke's framework, which encompassed familiarisation, coding, and the identification, definition, and naming of themes.<sup>25</sup> While the themes, derived inductively from the literature review and interview transcripts and subsequently informing the article's headings, differ due to the distinct nature of their empirical material, they are cohesively integrated through Koselleck's overarching theoretical framework. Koselleck's four dimensions (see below) serve as a lens for both the analysis and the concluding discussion, enabling a more nuanced interpretation of the findings.

A few caveats regarding terminology are necessary: We use "defectology" as a comprehensive label for Vygotsky's diverse writings on disability. This choice is made

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<sup>24</sup> Personal communication with Roger Säljö, 26 October 2023.

<sup>25</sup> Virginia Braun and Victoria Clarke, *Thematic Analysis: A Practical Guide* (Los Angeles: SAGE, 2022).

despite many scholars preferring more mainstream concepts like “cultural-historical psychology” or “sociocultural theory” when discussing Vygotsky’s legacy. Others place defectology within the developing discipline of Soviet pedology in the 1920s, or within the Soviet “science of the child.”<sup>26</sup> As the literature review will demonstrate, Vygotsky’s views on disability are often reframed using contemporary terminology, such as the “dialectical cultural-historical approach”<sup>27</sup> or the “strengths-based approach” to disability.<sup>28</sup> We retain the term defectology for two main reasons: Vygotsky himself used it, though with a meaning different from today’s, and we aim to thoroughly explore the term’s conceptual origins and restore its original Vygotskian meaning.

### Conceptual history: a theoretical perspective

Conceptual history, as articulated by Reinhart Koselleck (1923–2006), explores the historical use of political and social concepts, emphasising the relationship between history and language.<sup>29</sup> At the core of Koselleck’s framework is the idea that historical experience and change is condensed in concepts, and that conceptual shifts signify moments of historical novelty. As Koselleck stated, conceptual history “seeks to comprehend the process by which experiences came to be registered in concepts and – as far as possible – to identify the theories included in such concepts.”<sup>30</sup> As all concepts contain an “internal temporal structure,”<sup>31</sup> conceptual history also holds present-day relevance, as scrutinizing “the historical background and meanings of words will illuminate today’s expressions and slogans. Definitions need no longer remain ahistorical or excessively abstract because of ignorance of what they may have meant in the past.”<sup>32</sup>

Koselleck distinguishes four aspects that characterise historical concepts, which simultaneously serve as a methodological tool for scrutinizing their meaning and change over time. The first characteristic of modern concepts pertains to their **democratisation** (*Demokratisierung*), positing that the modern era introduced a broader distribution of concepts that were no longer confined to those in power but circulated among a wider population. The second characteristic is the introduction of a **temporalisation** (*Verzeitlichung*) of concepts, meaning that social order was no longer perceived as something closed, stable, and unchangeable.<sup>33</sup> Instead, modern concepts began to

26 Byford (2020), 185–217.

27 Louise Böttcher and Jesper Dammeyer, “Beyond a Biomedical and Social Model of Disability: A Cultural-Historical Approach,” in *Development and Learning of Young Children with Disabilities. A Vygotskian Perspective* (Springer International Publishing, 2016), 3–23.

28 Wil H.E. Buntinx, “Understanding Disability: A Strengths-Based Approach,” in *The Oxford Handbook of Positive Psychology and Disability*, ed. Michael L. Wehmeyer (Oxford: Oxford University Press, 2013), 7–18.

29 Although conceptual history initially focused on the German context, the lexicon includes studies of broader semantic changes in other European countries. In addition to *Geschichtliche Grundbegriffe*, Koselleck further refined this theoretical approach in subsequent studies, ultimately culminating in his last book: Reinhart Koselleck, *Begriffsgeschichten: Studien zur Semantik und Pragmatik der politischen und sozialen Sprache* (Frankfurt am Main: Suhrkamp, 2006).

30 Reinhart Koselleck, “Introduction,” in *Global Conceptual History. A Reader*, ed. Margrit Pernau and Dominic Sachsenmaier (London: Bloomsbury, 2016), 41.

31 Koselleck (2006), 100.

32 Koselleck (2016), 41.

33 Koselleck (2006), 77–85.

revolve around the idea of progress and future orientation, becoming “infused with a sense of expectation that they had not had before.”<sup>34</sup> The third characteristic pertains to the **ideologisation** (*Ideologisierung*) of concepts. Koselleck argues that pre-modern particularity was replaced by a more abstract and universal outlook, which he coined “collective singulars,” becoming more general, but also more ambiguous, thus easily integrated into ideologies. “In this sense,” Koselleck wrote, “a structural transformation becomes evident: a growing trend away from life in settings of manageable size and relative stability, and towards new horizons of possible experiences.”<sup>35</sup> The fourth characteristic, which is interconnected with the previous ones, is the **politicisation** (*Politisierung*) of concepts. As the masses began appropriating concepts and became politically mobilised, this led to an increase in the use of oppositions (*Gegenbegriffe*), such as “revolutionary” versus “reactionary.” These four dimensions allow us to apply conceptual history as a theoretical and methodological lens, making it particularly relevant for studying the evolution and reception of Vygotsky’s defectology.

### Literature review

The following literature review on the reception of Vygotsky’s defectology underscores its impact on contemporary research across special education, and disability studies. In analysing core ideas from the selected 34 key articles, we emphasise, clarify, or illustrate core ideas with references to Vygotsky’s original texts on defectology.

To revive the overlooked legacy of Vygotsky’s defectology, scholars have explored his archives,<sup>36</sup> revisited translations, and offered new historical and theoretical insights. As Yasnitsky notes, “among the pioneers of psychology, Lev Vygotsky (1896–1934) may be the best known of those who are least understood”<sup>37</sup> – a view we find equally true of his defectology. Knox and Kozulin underscore concepts they describe as “the trademark of Vygotskian tradition” and illustrate “the links between Vygotsky the theorist, Vygotsky the clinician and Vygotsky the pedagogue.”<sup>38</sup> Lubovsky credits him with laying “the foundation for serious theoretical work in the area of defectology.”<sup>39</sup> while Kozulin and Gindis highlight that “not many theories formulated more than seventy years ago continue to attract attention and provoke controversy.”<sup>40</sup>

34 Koselleck (2016), 36.

35 Koselleck (2016), 39.

36 Elena E. Kravtsova, “In Memoriam Gita Lvovna Vygodskaya (1925–2010),” *Journal of Russian & East European Psychology*, no. 4 (2010).

37 Anton Yasnitsky, “Lev Vygotsky: Philologist and Defectologist, A Sociointellectual Biography,” in *Portraits of Pioneers in Developmental Psychology*, ed. Wade Pickren, Donald A. Dewsbury, and Michael Wertheimer (Psychology Press, 2011), 109.

38 Jane E. Knox and Alex Kozulin, “Vygotskian Tradition in the Psychological Study of Handicapped, Particularly Deaf Children,” (paper presented at the Biennial Meeting of the Society for Research and Development in Children, Baltimore, MD, April 23–26, 1987).

39 Vladimir I. Lubovsky, “Defectology: The Science of Handicapped Children,” *International Review of Education* 20 (1974), 298–305.

40 Kozulin and Gindis (2007), 361.

### **Vygotsky's defectology in contemporary special education and inclusive education**

While the influence of Vygotsky's defectological work is acknowledged, there remains significant potential for its broader application in special education, especially when compared to the widespread use of his developmental psychology.<sup>41</sup> Vygotsky's contribution to defectology is unquestionably important as he "elevated 'defectology' to the status of a science, with a coherent theory, body of scientific data, relevant methods, organisational institutions, and a cohort of enthusiastic researchers and practitioners"<sup>42</sup> and, for example, scholars highlight the role of his ideas in contemporary deaf education<sup>43</sup> and ground their interventions in his theories.<sup>44</sup> Concepts and theories outlined in Vygotsky's defectological writings are relevant to contemporary special education<sup>45</sup> and disability studies; for example, Vygotsky's Cultural-Historical Theory, the Theory of Dysontogenesis and the positive differential approach are discussed in theoretical papers, book chapters or used as a point of departure in research articles.

Gindis acknowledges the relevance of Vygotsky's defectology to special education because it offers "a theoretical framework that might integrate all branches of contemporary special education;"<sup>46</sup> however, Vygotsky's concepts differ from those of special education, covering fewer categories like intellectual disability, visual and auditory impairments, and autism, while contemporary special education includes more (e.g., learning difficulties). Although his work with disabled children shaped his theories, Vygotsky did not extensively detail the methodology, teaching methods, or their effects on learning.<sup>47</sup>

While most articles focus on special education and psychology,<sup>48</sup> Sandomirskaja departs from this pattern and scrutinises the ideological and political implications of Vygotsky's defectology, portraying it as deeply intertwined with Marxist utopian ideals. Vygotsky's concepts of "defect," "childhood," and "blindness" go beyond technical terms, serving as metaphors for broader political and historical narratives. Sandomirskaja argues that Vygotsky's defectology symbolises the revolutionary transformation of society, where true equality under socialism abolishes the distinction between the

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41 Louise Bøttcher and Jesper Dammeyer, "Disability as a dialectical concept: building on Vygotsky's defectology," *European Journal of Special Needs Education* 27, no. 4 (2012), 433–46; Boris Gindis, "Vygotsky's Vision: Reshaping the Practice of Special Education for the 21st Century," *Remedial and Special Education* 20, no. 6 (1999), 333–40.

42 Boris Gindis, "Viewing the Disabled Child in the Sociocultural Milieu: Vygotsky's Quest," *School Psychology International* 16, no. 2 (1995), 156.

43 Galina Zaitseva, Michael Pursglove, and Susan Gregory, "Vygotsky, Sign Language, and the Education of Deaf Pupils," *Journal of Deaf Studies and Deaf Education* 4, no. 1 (1999), 9–15.

44 Viktor K. Zaretskii, "Vygotsky's Principle 'One Step in Learning - One Hundred Steps in Development': From Idea to Practice," *Kul'turno-istoricheskaya psikhologiya = Cultural-Historical Psychology* 12, no. 3 (2016), 149–88.

45 Ljupco Ajdinski and Lani Florian, "Special Education in Macedonia," *European Journal of Special Needs Education* 12, no. 2 (1997), 116–26; Boris Gindis, "The Social/Cultural Implication of Disability: Vygotsky's Paradigm for Special Education," *Educational Psychologist* 30, no. 2 (1995), 77–81.

46 Gindis (1999), 339.

47 Michael E. Skyer, "Vygotskian Perspectives in Deaf Education: An Introduction in Two Movements," *American Annals of the Deaf*, 168, no. 1 (2023), 12–36.

48 Luciano Mecacci, "Vygotsky and Psychology as Normative Science," *Integrative Psychological & Behavioral Science* 55, no. 4 (2021), 728–34.

”normal” and “defective,” enabling all citizens to fully contribute to the collective.<sup>49</sup> This interpretation highlights how Vygotsky’s defectology reflects Koselleck’s temporalisation, linking it to social progress, and ideologisation, as it sought broader societal impact beyond the ivory tower of academic psychology.

The extent to which Vygotsky’s defectology transcended the narrow boundaries of academic research, aligning with Koselleck’s conceptual categories, is further corroborated by evidence from other studies that illustrate its broader societal and ideological implications. Hausstätter and Vik highlight key Vygotskian concepts in defectology that resonate with Biesta’s *Pädagogik*, offering valuable insights for inclusive education. These perspectives connect knowledge with culture, primary and secondary disabilities, and compensation, framing education as a social process that transforms attitudes toward children with disabilities.<sup>50</sup> In a similar vein, Smagorinsky emphasises Vygotsky’s “interest in creating a more inclusive society for people of difference as among the most compelling aspects of his theory of human development”<sup>51</sup> and points out the relevance of Vygotsky’s conceptualisation of secondary disability to contemporary education and for the inclusion<sup>52</sup> and support of people with mental health issues.<sup>53</sup> Joubert and Harrington critically examine inclusive education in Kosovo and Russia through the lens of Vygotsky’s defectology.<sup>54</sup> In a qualitative study of collaborative work sequences that include a student with Down syndrome, a nondisabled student and the teacher, the researchers refer to Vygotsky’s theory of compensation, the role of the class collective and the role of the teacher as a mediator and facilitator in knowledge production and use these ideas in their analyses.<sup>55</sup>

### *Vygotsky’s influence on deaf education*

Several contemporary studies explore the relevant, yet not fully known legacy of Vygotsky’s defectology in deaf studies and education. Zaitseva, Pursglove, and Gregory discuss Vygotsky’s impact on the education of deaf children in the Soviet Union,

49 Irina Sandomirskaja, “Das blinde Kind: Lew Vygotskijs Defektologie als poetische und politische Allegorie,” in *Sehstörungen. Grenzwerte des Visuellen in Künsten und Wissenschaften*, ed. Anne-Kathrin Reulecke and Margarete Vöhringer (Berlin: Kulturverlag Kadmos, 2019), 85–105.

50 Rune Hausstätter and Stine Vik, “Inclusion and special needs education. A theoretical framework of an overall perspective of inclusive special education,” in *Dialogues between Northern and Eastern Europe on the Development of Inclusion: Theoretical and Practical Perspectives*, ed. Natallia Bahdanovitch Hanssen, Sven-Erik Hansén, and Kristina Ström (Routledge, 2021), 18–32.

51 Peter Smagorinsky, “Vygotsky, ‘Defectology,’ and the Inclusion of People of Difference in the Broader Cultural Stream,” *Journal of Language and Literacy Education [Online]* 8, no. 1 (2012), 1–25. Available at <http://jolle.coe.uga.edu/wp-content/uploads/2012/05/Vygotsky-and-Defectology.pdf>

52 Peter Smagorinsky, “‘Every Individual Has His Own Insanity’: Applying Vygotsky’s Work on Defectology to the Question of Mental Health as an Issue of Inclusion,” *Learning, Culture and Social Interaction* 1, no. 2 (2012), 67–77.

53 Leslie Susan Cook and Peter Smagorinsky, “Constructing Positive Social Updrafts for Extranormative Personalities,” *Learning, Culture and Social Interaction* 3, no. 4 (2014), 296–308.

54 Roelien Joubert and Ingrid Harrington, “Inclusive Education: Origins, ‘Defectology,’ and Kosovo’s Experiences of Inclusive Education,” *International Journal of Higher Education* 9, no. 1 (2020), 52–59.

55 Fabiana Luiza de Rezende Mendonça et al., “Mediation in the Classroom in the Construction of Knowledge in Inclusive Schools,” *Psicologia Escolar e Educacional (Online)* 24, (2020).

among other things in the creation of a Soviet model of bilingual education.<sup>56</sup> Vygotsky increasingly recognised the importance of sign language in deaf children's cognitive and social development, a view further explored by Günther.<sup>57</sup> Skyer synthesises the contributions and limitations of Vygotsky's work on deaf education, contextualising it with contemporary research to make his writings more accessible to those interested in this field,<sup>58</sup> since "yet for all of Vygotsky's fame, his role in research and theory in deaf pedagogy is virtually unknown."<sup>59</sup> In 2023, *The American Annals of the Deaf* dedicated a special issue to Vygotsky and his influence in deaf studies. In the editorial,<sup>60</sup> Paul recognises that "there is little doubt that Vygotsky's ideas have influenced the thinking and research of a number of scholars in our field and in other areas of special education."<sup>61</sup> while Skyer reviews Vygotsky's contributions to deaf studies and discusses current developments inspired by his theories framed as "a neo-Vygotskian, postmodern defectological revival."<sup>62</sup> In their concluding article of this special issue, Willicheva and Hall synthesises Vygotsky's contribution to the field and argue in favour of a "biosocial accountability in deaf education" with a focus on professional accountability.<sup>63</sup> From a teacher training perspective, Smagorinsky and Lang use a Vygotskian lens when they analyse and discuss the results of a study with teacher candidates.<sup>64</sup>

### ***Strengths-Based approaches, disability studies, and Vygotsky's dialectical theory of development***

Vygotsky's "positive differential approach" to intellectually disabled children,<sup>65</sup> is reflected by Gindis who recognises the focus on the identification of strengths as a 'trademark of Vygotsky's approach.'<sup>66</sup> Other authors consider that his "insistence on

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56 Zaitseva et al. (1999), 9–15.

57 Klaus B. Günther, "Zur Bedeutung Lev Semjonovic Vygotskijs für die'Defektologie' im Allgemeinen und die 'Surdopädagogik' im Besonderen," *Das Zeichen*, no. 25 (2011), 218–33.

58 Michael E. Skyer, "Invited Article: The Bright Triad and Five Propositions: Toward a Vygotskian Framework for Deaf Pedagogy and Research," *American Annals of the Deaf* 164, no. 5 (2020), 577–91.

59 Skyer (2020), 578.

60 Peter V. Paul, "Perhaps This Is Everything You Wanted to Know About Vygotsky, but Were Afraid to Ask," *American Annals of the Deaf* 168, no. 1 (2023), 7–11.

61 Paul (2023), 7.

62 Skyer (2023), 27.

63 Kristina Willicheva and Wyatt C. Hall, "From vicious circles to virtuous cycles: Vygotskian-inspired conclusions for biomedicine and deaf education," *American Annals of the Deaf* 168, no. 1 (2023), 162–76.

64 Peter Smagorinsky and Merida Lang, "Learning to Create Environments for Deafness Among Hearing Preservice Teachers: A Defectological Approach," *Learning, Culture and Social Interaction* 38 (2023).

65 Lev S. Vygotsky, "Compensatory Processes in the Development of the Retarded Child," in *The Collected Works of L.S. Vygotsky: Volume 2: Fundamentals of Defectology (Abnormal Psychology and Learning Disabilities)*, ed. Robert W. Rieber and Aaron S. Carton (New York: Plenum Press, 1993e), 123.

66 Gindis (1995b), 164.

the search for positive abilities and a qualitative uniqueness in the development of the abnormal child dominates his works.<sup>67</sup> Knox and Kozulin contend that:

only a truly differentiated learning environment can fully develop a deaf child's cognitive skills and overall personality because only in the specially manipulated setting proposed by Vygotsky and his followers will the entire staff be able to exclusively serve the individual needs of a handicapped child, building on strengths and uniqueness, not on handicaps.<sup>68</sup>

The influence of Vygotsky's defectology on disability studies is particularly evident in Bøttcher and Dammeyer's cultural-historical dialectical model of disability. This model emphasises that, while disability may stem from one or more biological factors, it must always be studied as a phenomenon that emerges within specific physical, social, and cultural-historical contexts.<sup>69</sup> By using as a point of departure the theory of dialectical nature of child development and the theory of incongruence, Bøttcher and Dammeyer open up new avenues in disability research as illustrated in their qualitative study with a child who has cerebral palsy and cortical visual impairment,<sup>70</sup> in a review of the associations between childhood disability and psychopathology,<sup>71</sup> and in a qualitative study with a girl without verbal speech.<sup>72</sup> The authors situate Vygotsky's defectology outside the medical model of disability when they conclude that:

usual institutional settings and activities might be unsuitable for the majority of children with disabilities. [...] The dialectical cultural-historical approach to understanding disability highlights that even though the disability arises from one or more biological defects, it is at all times necessary to study disability as a phenomenon that has emerged within specific physical, social and cultural-historical contexts.<sup>73</sup>

Vygotsky's theory of dialectical development is discussed by Souza and Dainez, who focus on what they term "social education" while analysing the right to education for disabled people in Brazil, particularly in relation to inclusive education and the social

67 Pedagogika Editorial Staff, "L. S. Vygotsky and Contemporary Defectology," *Journal of Soviet Psychology* 21, no. 4 (1983), 89. (Original work published in 1982).

68 Knox and Kozulin (1987), 28.

69 Bøttcher and Dammeyer (2016) 9; A key element in Vygotsky's theory on the dialectic nature of development is the incongruence between the biological or natural development and the cultural development of the disabled child. Whereas in the case of nondisabled children "[b]oth lines of development-natural and cultural-coincide and merge one into the other," in the case of a disabled child "...the two lines of development will diverge substantially from one another. The degree and character of the divergence will be determined and measured in each case by the different qualitative and quantitative effects of the defect on each of the two lines." Vygotsky (1993a), 42-43.

70 Louise Bøttcher and Jesper Dammeyer, "Disability as a Dialectical Concept: Building on Vygotsky's Defectology," *European Journal of Special Needs Education* 27, no. 4 (2012), 433-46.

71 Louise Bøttcher and Jesper Dammeyer, "Disability as a Risk Factor? Development of Psychopathology in Children with Disabilities," *Research in Developmental Disabilities* 34, no. 10 (2013), 3607-17.

72 Louise Bøttcher, "Supporting Unusual Development Through Moral Imagination," *Learning, Culture and Social Interaction*, 30 (2021).

73 Bøttcher and Dammeyer (2012), 436.

model of disability.<sup>74</sup> In other studies, Vygotsky's sociocultural theory is used as a lens to critically analyse deaf education in the United States, and some authors recommend actionable solutions that align with the principles of a strengths-based education<sup>75</sup> or call for more professional accountability and justice in deaf education.<sup>76</sup> Other authors review Vygotsky's dialectic development and the dynamic nature of disability through the concept of time and in so doing they rightly mention the timeliness of his defectology.<sup>77</sup>

Following Koselleck's framework, these interpretations echo temporalisation and ideologisation, positioning defectology within a wider cultural-historical continuum that challenges deterministic scientific models, and advocates for a more inclusive and socially engaged conception of human development. The claimed timelessness of Vygotsky's defectology thus operates as a broad, universalised category, aligning with what Koselleck termed "collective singulars"—concepts that shape historical understanding and discourse.

### **Tracing the legacy and reception of Vygotsky's defectology**

In this section, we will explore the legacy and reception of Vygotsky's defectology in both Eastern and Western contexts, drawing insights from semi-structured interviews with six scholars. To ensure confidentiality, we have assigned a pseudonym to each respondent, identified as Tamara, Marina and Valery (RU), Victor (RO), and Gerhard and Wilhelm (GER).

#### ***Trajectories of Vygotsky's defectology after Stalin***

Following Vygotsky's death and the decline of his works after 1934, there was a gradual revival of interest in his writings after the collapse of Stalinism. In this context, Vygotsky's close collaborators, Luria and Leontiev, played a pivotal role in republishing and disseminating his defectological works during the post-war period.

Tamara became familiar with Vygotsky's works as a university student in the late 1960s. After graduating from Moscow State University, Tamara joined the Institute of Defectology, formerly Vygotsky's workplace, where she collaborated with his daughter, Gita Vygotskaya. Tamara's career illustrates how Vygotsky's works were passed on to the next generation of Soviet scholars.

Marina further elaborated on the reception of Vygotsky's defectological writings in the late Soviet period, shaped by the liberalisation of the academic and intellectual life under Glasnost and Perestroika: "It was a good time to promote [Vygotsky] because this was the time of Perestroika and following political changes... when all democratic and humanitarian theories were booming."

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74 Flávia Faissal de Souza and Débora Dainez, "Defectology and School Education: Implications for the Human Rights Field," *Educação e Realidade* 47 (2022), e116863.

75 Katie R. Potier and Heidi Givens, "Synthesizing Vygotsky's Sociocultural Theory and Deaf Pedagogy Framework Toward Deaf Education Reform: Perspectives from Teachers of the Deaf," *American Annals of the Deaf* 168, no. 1 (2023), 102–27.

76 Willicheva and Hall (2023), 162–76.

77 Marcello Ferreira et al., "Time and Cognitive Development: From Vygotsky's Thinking to Different Notions of Disability in the School Environment," *Humanities & Social Sciences Communications* 10, no. 1 (2023), 768–78.

The rediscovery of Vygotsky's defectology in West Germany paralleled its timeline elsewhere but followed distinct development paths due to post-war influences from English-speaking scholars and limited contacts with the GDR. According to Gerhard, this process was deeply connected to debates about the Nazi past and Germany's division after 1949, and thus, "embedded in the founding of the Federal Republic of Germany." He explained that the 1968 movement led to a major split in special education. The so-called "march through the institutions," a strategy by the student movement to reform the political system, also targeted the special education system, "which we perceived as profoundly unsettling," as Gerhard remembers:

Many of those people operating within the special education system were former Nazi party members and involved in building and influencing the educational system.... Who could have made us aware of [other] scientific cultures that differ from this tradition?

In this context, Vygotsky's approach to disability was transmitted through the writings of his associates Luria and Leontiev, collectively referred to as the "Troika:"

We were discussing Vygotsky based on English literature [or] translations [into German] that, of course, came from the GDR...And that was basically our fundamental approach regarding the whole Troika, of course.

Gerhard identified the psychologist Wolfgang Jantzen (1941–2020) as the key figure in introducing Vygotsky's defectology to West Germany, with Wilhelm confirming Jantzen's crucial role in shaping the reception of Vygotsky's work, particularly in activity theory and cultural-historical psychology. Gerhard also highlighted Joachim Lompscher (1932–2005), who studied in Moscow in the 1950s and later popularised Vygotsky's works at the Central German Pedagogical Institute in East Berlin.<sup>78</sup>

Wilhelm similarly underscored the link between Lompscher and Jantzen, who became Wilhelm Wundt Professor at Karl Marx University (Leipzig) in 1987. He noted Jantzen's efforts to make Soviet literature accessible in West Germany via the Pahl-Rubenstein press, which published works by Vygotsky, Leontiev, Luria, and Galperin. Wilhelm agreed that interest in Vygotsky's defectology in West Germany rose in the 1980s, mirroring Soviet trends:

[Vygotsky's increased reception] started in the 70s and 80s... The importance of Vygotsky in that context was only recognised relatively late. The Americans were simply faster than the Europeans.

During this period, a loosely organised group of leftist scholars, centred around Jantzen, emerged in West Germany in the 1960s. As Gerhard put it, "Back then, we could only spread our ideas through 'grey literature' and through the development of special education, where we could make an impact." This group actively challenged the segregationist approach to disability, advocating for a more inclusive approach inspired by Vygotsky.

<sup>78</sup> Hartmut Giest, ed., *Erinnerungen für die Zukunft – Pädagogische Psychologie in der DDR* (Berlin: Lehmanns, 2006).

In Romania, the reception of Vygotsky followed a similar path. Victor describes how the Soviet-inspired field of defectology was introduced through Babeş-Bolyai University in Cluj-Napoca, with the first centre of defectology established in 1960 under Alexandru Roşca.<sup>79</sup> As a student between 1966 and 1971, Victor encountered Vygotsky's defectology "through Russian and Romanian sources, though only some of his works were translated." Vygotsky's *zone of proximal development* began to permeate Romanian academia in the early 1960s, but his defectological works remained relatively unknown. The first introduction of Vygotsky's ideas about disability to a Romanian audience came with Paul Popescu-Neveanu's book *Psychology in the USSR*, followed by additional translations in the 1970s, although Vygotsky's defectological writings remained marginal in Romania.

### ***Competing paradigms, ideologisation, and politicisation***

Despite the revitalisation of Vygotsky's work since the 1950s, many noted that his ideas remained marginal, often challenged by dominant paradigms that differ by country. Marina highlighted how defectology was redefined under the Soviet system as a segregated form of special education, diverging from Vygotsky's original ethos:

[Vygotsky] was also mostly ignored because his ideas are very humanitarian, right? So, what he basically said is that...you don't have to segregate, you don't have to build any special schools or whatever. ...But in Soviet Russia...defectology was based on segregation. That is why I think Vygotsky's ideas were not popular at that time...And still now, we have people with this old kind of approach...for them, any person with a disability is kind of doomed...

Tamara painted a similar picture, contending that regarding the idea of inclusive education, "which Vygotsky dreamed of, [the field] began to be really divided in the 1970s and 1980s." She reminisced that in the 1970s, the ideas of inclusive education grew louder and louder. However, these approaches were "still very far from the widespread implementation of these ideas in practice." Tamara's account thus confirms that the term defectology was dissociated from Vygotsky's thought, despite his foundational contributions to the field.

Marina argued that "the idea of segregation will die only when these people die, [representing this] old type of education." She also identified ongoing power struggles within her discipline, noting that Vygotsky's theories are now challenged by Western models like *Applied Behavior Analysis (ABA)*, which have gained popularity in Russia and significantly challenge Vygotsky's legacy:

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79 On the origins of Romanian defectology, see: Radu Harald Dinu, "Medical Discourses on Dis/ability in State Socialist Romania: A Critical Genealogy," in *Dis/ability in Media, Law and History: Intersectional, Embodied and Socially Constructed?* ed. Micky Lee, Frank Rudy Cooper, and Pat Reeve (London: Routledge, 2022), 76–89.

look, a good teacher, a good psychologist, a good clinician [sic!] does a lot of things built on his professional experience and professional intuition. For example, clinical thinking... You cannot put clinical thinking in protocols. You can develop it as a quality as a very good professional quality, but it is not something which you can formalise.... So here I think, uh, [there is a] different philosophy behind it. It is difficult to change a philosophy just like that.

Unlike the Soviet context, the reception of Vygotsky's ideas on disability in West Germany and the development of special education paradigms like *Heilpädagogik* and *Sonderpädagogik* took a unique path. Gerhard argues that scholars like Jantzen aimed to reform the "traditional" special education system in West Germany, which often labeled disabled children as "uneducable, unteachable, unable to attend school." To challenge this "traditional approach," Gerhard and his associates founded the *Zeitschrift Behindertenpädagogik*,<sup>80</sup> which is still published today. According to him, this move was conducted as an act of opposition against the *Zeitschrift für Heilpädagogik*,<sup>81</sup> which, according to Gerhard, represented the "conservative and reactionary" view. The post-war special education system in West Germany was reinforced by the Association of Special Schools (*Verband der Sonderschulen*), now known as the Association of Special Education (*Verband Sonderpädagogik*), "a powerful organization with over 10,000 members." According to Gerhard, this association

dictated politically what was to be considered as curative and special education. They [proposed] 10 types of special schools...an absurd theatre. They attacked us vehemently. [As] dialectical materialism was their number one enemy, we started from scratch to resist the entire established curative and special pedagogic mafia, as I consciously call them, who built institutions, psychiatric facilities, and state hospitals for the exclusion and confinement of people.

The term "mafia" highlights the fierce power struggles between mainstream special education and the Vygotskian tradition. Gerhard also noted how Vygotsky's legacy was distorted in West German special education, where the term defectology "was immediately picked up by the seemingly progressive forces." He recalled how critics, claiming to be progressive, opposed Soviet frameworks:

They said, "we want to move away from this deficit-oriented thinking toward individuals' capabilities, and now they are pushing this defectology." This means that what the term defectology signifies in the cultural-historical tradition, was not understood at all here but was immediately taken as a superficial term to dismiss everything.

In this context, Wilhelm interestingly used defectology to criticise his academic adversaries. This highlights how contested the term was among West German special educators: "As to the term 'defectology,' in Germany, it's more accurately represented in the

<sup>80</sup> In English: Journal for Disability Pedagogy.

<sup>81</sup> In English: Journal of Curative Pedagogy. <https://www.verband-sonderpaedagogik.de/zeitschrift/aktuelle-ausgabe/>

context of curative pedagogy [*Heilpädagogik*], or synonymously with disability pedagogy [*Behindertenpädagogik*].”

Wilhelm emphasised that Vygotsky's defectology was central to his academic training in the 1980s, “although it was not named as such at the time.” Even after graduation, while working at a special school, he continued engaging with “what you now call defectology.” These phrases suggest that proponents of Vygotsky's philosophy distanced themselves from the term, indicating that in the 1970s and 1980s in West Germany, it carried a similar stigma as in other countries.

Both German respondents acknowledged their inability to establish the Vygotskian tradition as a recognised field, due to its limited practical implementation in special education, as well as competition from dominant academic paradigms. Many of these struggles centred at the University of Bremen, where Jantzen and his colleagues promoted inclusive approaches to disability based on Vygotsky's ideas. According to Gerhard, the university's reformist foundation enabled such efforts in the 1970s,<sup>82</sup> but by the 1980s, these attempts were gradually “destroyed:”

the University of Bremen was ... left-leaning, even bordering on socialist positions beyond a social democratic stance. When the state of Bremen became financially dependent on federal state funding through Bavaria, these structures were significantly dismantled.

The implementation of Vygotsky-inspired inclusive ideas faced challenges on multiple levels. On the university campus, the presence of intellectually disabled people caused fear among others, as Gerhard emphasised, because many colleagues “were not accustomed to people who behave differently. They said it could no longer be considered scientific what I was doing...and this led other universities to avoid such initiatives.”

Gerhard also described the challenges he and his colleagues faced in implementing inclusive education at upper-secondary schools in Bremen during the 1990s: “Many people said that if we start to include intellectually disabled people in mainstream schools, the future managers, who are desperately needed to lead Bremen out of the financial crisis would refrain from going to a school where...intellectually disabled children are enrolled.” These instances exemplify how Vygotskian-inspired methods permeated both academic discourse and educational practice, frequently provoking debate and resistance.

As the literature review showed that Vygotsky's defectology was interpreted through varying ideological lenses across countries—a view echoed in the interviews, where German respondents described the challenges to its association with Soviet ideology. Wilhelm noted that Vygotsky's faced resistance in both the Soviet Union and abroad: “During the Stalin era, it was particularly problematic because his ideas did not align with what dogmatic materialism represented, [and even] in the former GDR, Vygotsky and activity theory were not necessarily part of the mainstream.” In Germany, Vygotsky's legacy encountered significant challenges, reflecting the ideologisation of his thought during the post-war period: “Because, to put it cautiously, Vygotsky was very ideologically charged. The mere fact that he came from the Soviet Union led to

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82 The University of Bremen was founded in 1971.

prejudices, so that ultimately, you see, discussions were never really about the content but always ideologically driven.” As Wilhelm emphasised, Vygotsky’s contributions thus remain “ideologically overloaded” in German discourses on disability, and he also contended that there are “systematic and deliberate efforts to negate his work.” This exclusion “extends to the dimensions of his theories, shifting the debate from substance to ideological stances,” making it “incredibly difficult” for Vygotsky’s approach to disability “to be considered on its own merits.”

### *Misconceptions of Vygotsky’s defectology*

As discussed earlier, Soviet defectology diverged from its Vygotskian roots, evolving into a defect-oriented paradigm seen as outdated. This view was consistently echoed in interviews, either explicitly or implicitly. Valery, for example, avoided the term entirely, placing Vygotsky within the broader cultural-historical paradigm and linking “defectologists” to the “old Soviet system.” Marina echoed this view, stating, “defectologists are associated with the Soviet regime, and all this segregation system.” Tamara also attributed the marginalisation of Vygotsky’s defectology post-1945 to both his early death and the terminology he used: “I consider Vygotsky a very talented theorist who predicted the possibilities of inclusive education... But his life was very short, the works he wrote are quite difficult to understand even in Russian.”

Another reason for the varied (mis)interpretations of Vygotsky’s defectology is the difficulty of translating his work. Scholars note the challenge of finding accurate English equivalents for concepts written in 1920’s and 1930’s Russian, and van der Veer and Yasnitsky highlight gaps and errors in the existing translations.<sup>83</sup> This challenge is highlighted by both the translators of Vygotsky’s *Collected Works* and other studies.<sup>84</sup> As Gerhard put it, we were “dependent on translated literature from the GDR [which] was handled quite carelessly. Some statements were indeed problematic when we talked to colleagues who were proficient in Russian.” Wilhelm confirms the problem of translating Vygotskian terminology to other languages, stating:

overall, this was a huge problem... the problem of translation, because, you know... certain terms had different semantics...Some weren’t translated from Russian into German [and] translations from Russian into English were already problematic.

According to Gerhard, this distorted reception of Vygotsky, often omitting the wider historical and intellectual context of his oeuvre: “Even if Vygotsky’s approaches are indispensable today and can no longer be ignored by the mainstream, the alarming thing is that they are often received in a very fragmented way. The broader intellectual horizon is missing to develop them properly.” Ultimately, Wilhelm also points to the avant-garde potential in Vygotsky’s work that can partly explain why he was misunderstood: “What defined Vygotsky was that he always seemed to be in open contra-

83 René van der Veer and Anton Yasnitsky, “Vygotsky in English: What Still Needs to Be Done,” *Integrative Psychological & Behavioral Science* 45, no. 4 (2011), 475–93.

84 René Van der Veer and Anton Yasnitsky, “Translating Vygotsky. Some problems of transnational Vygotskian science,” in *Revisionist Revolution in Vygotsky Studies. The State of the Art*, ed. René Van der Veer and Anton Yasnitsky (London: Routledge, 2015), 142–74.

diction to his time. And by doing so, he set a development in motion. And this still holds true today.”

### *New wine into old wineskins*

Another theme from the interviews was that many contemporary approaches, particularly the social model of disability, reflect Vygotsky's work without acknowledging it. All respondents emphasised that he anticipated key frameworks now central to disability studies. As Tamara put it “the most significant ideas for me were also his understanding that a ‘defect’ is primarily a social and not an organic abnormality of behavior.” Wilhelm's outlook echoes Tamara's observation when stating that:

in disability studies...experts do not acknowledge that the social construction of disability was being discussed as early as 1924. Instead, they ultimately place it in the British context. This is not entirely accurate...well, that's scientifically dishonest, isn't it? Just to ignore it like that.

Furthermore, Wilhelm stressed that Vygotsky's work anticipated the distinction between impairment and disability, “which is now recognized by the UNCRPD,”<sup>85</sup> Vygotsky “clearly spoke out against viewing disability solely as a biological phenomenon [and] emphasised that disability only becomes a problem within a social context.” Vygotsky's proponents in Germany, which Wilhelm termed the school of “critical-materialistic disability pedagogy,”<sup>86</sup> adopted this view and argued that from this perspective:

there are no intellectually disabled people...there is no “right” and “wrong” ... Vygotsky's idea [was] not to personalise and individualise systemic problems...And that's the arrogance, excuse me for saying so, the arrogance of disability studies, isn't it? Laying claim to that “only we are the ones who understood this.” It actually negates the fact that the debate between these rival paradigms has been ongoing for centuries.

In a similar vein, Victor also underlined that “some theoretical implications of Vygotsky's defectology can be found in the social model of disability and the International Classification of Functioning, Disability and Health (ICF).”

According to Gerhard, Vygotsky's core ideas on disability also resonate with other academic fields. Referring to Italian scholars, he mentioned Franco Basaglia, whose advocacy for closing mental hospitals, led to the “Basaglia Law” and the broader Italian deinstitutionalisation movement: “what we published back then, we actually found reflected in Italian publications, which were partly based on the same [ideas], even though Vygotsky did not explicitly appear in them.”

While the literature review emphasised the temporalisation of Vygotsky's ideas, their enduring relevance and adaptation over time, Marina's interview reinforces this by illustrating how his concepts aligned with her work in psychiatric rehabilitation in Italy: “A lot of their ideas [overlap] with...Vygotsky. They were not inherited [and]

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85 UN Convention on the Rights of Persons with Disabilities (adopted on 12 December 2006, entered into force on 3 May 2008).

86 *Kritisch-materialistische Behindertenpädagogik* in German.

they developed their own ideas, but there was a lot of similarity.” Most respondents noted that Vygotsky’s influence is evident in many modern disability approaches, yet his role is rarely recognised. German interviewees, in particular, saw this as a sign that disability studies often overlook their historical roots.

### *Vygotsky’s defectology and its impact on various disciplines today*

Although Vygotsky’s work remains influential across various fields, especially his views on disability, respondents distanced themselves from the term “defectology,” which they saw as tied to post-war Soviet special education rather than Vygotsky’s original thinking. Marina noted that ISCAR plays a central role in advancing his legacy and that she applies concepts like the zone of proximal development in her work with disabled adults. She also shared a surprising moment when IT professionals at a conference recognised ideas from cultural-historical psychology, showing the broader reach of Vygotsky’s influence today: “as one of them said, ‘oh, I realise it resembles Agile [methodologies] in information technology!’”

Additionally, according to Marina, Russian psychologists are drawing more on Vygotsky than special educators. She adds that families are more advanced in their thinking than special educators: “There is a lobby in Russia of the families of people with different kinds of disabilities who are lobbying for assisted living... So the idea of assisted living did not come from [researchers] or practitioners. It actually came from common people, from families.” The two German respondents offered a historical overview, noting that Gerhard and his colleagues promoted the cultural-historical paradigm by organising conferences in West Germany on Leontiev, which also helped bring attention to Vygotsky’s work. However, Gerhard acknowledged that only “a maximum of 50 people were involved, spread across the German-speaking region, including Austria.” This loosely organised network aimed to promote Leontiev’s and Vygotsky’s frameworks through national conferences, which were productive, but attempts to formalise these into a structured school met resistance over fears of dogmatisation, ultimately preventing its establishment.

The only institutionalisation mentioned was the Luria Society founded in 1987, which still promotes these ideas. Wilhelm emphasised its key role in advancing cultural-historical theories alongside major research from the University of Bremen and said that “we practically demonstrated that every child, regardless of individual characteristics, is capable of education and development. ... Yes, and that is clearly also oriented towards Vygotsky.”

Gerhard added that, despite the fact that “it was not possible to really establish these approaches at [West German] universities,” his work bore fruit during 1990s: “We used to say, ‘they can fight us, but they can no longer ignore what we have brought into the world.’”

### **Concluding discussion**

Our findings reveal that Vygotsky’s defectology faced significant challenges in state-socialist countries, where his inclusive and humanitarian approach was often overshadowed by the dominant segregationist Soviet special education system. In Russia, Vygotsky’s ideas experienced a revival during the later years of the Soviet Union, particularly during Glasnost and Perestroika, which allowed for a more liberal interpretation of his work. In Romania, while his defectology was introduced through

Soviet influence, it remained marginal compared to his other theories, such as the zone of proximal development. In contrast, in West Germany, Vygotsky's ideas were integrated differently, shaped by post-war politicisation and the division of Germany. West German scholars actively challenged traditional segregationist approaches in special education, although Vygotsky's ideas were often received through a fragmented lens and met with resistance from established institutions.

Our study highlights the four key dimensions of Koselleck's framework as they pertain to Vygotsky's defectology. *Democratisation* was a significant theme, as Vygotsky's ideas spread beyond the Soviet Union and were integrated into special education and disability studies across diverse global contexts. This expansion was facilitated by translations and academic exchanges, particularly between East and West Germany. *Ideologisation* was evident in how scholars elevated Vygotsky's ideas into "collective singulars," linking them to terms like "inclusive education" and the "social model of disability," thus portraying his work as a tool for social change and ideological advancement. This framing was mirrored in the interview findings, where respondents from West Germany recounted the challenges posed by the association of Vygotsky's ideas with Soviet ideology. *Temporalisation* was evident in both the literature and interviews, which emphasised the forward-looking nature of Vygotsky's defectology. His ideas, originally developed in the early twentieth century, were presented as dynamic and future-oriented, anticipating modern concepts such as the social model of disability. Respondents, such as Marina, highlighted how Vygotsky's humanitarian approach contrasted with the segregationist tendencies of the Soviet special education system, further illustrating this temporal dimension. Finally, *politicisation* was observed in the political struggles surrounding Vygotsky's legacy, particularly in West Germany. Here, Vygotsky's inclusive ideas clashed with segregationist views, and his concepts were used within oppositional discourses to reform the special education system. The post-war student movements created a political climate that facilitated the spread of Vygotsky's ideas, underscoring how his work became politically charged. Notably, his approach has also left traces in contemporary frameworks, such as the biopsychosocial model of the International Classification of Functioning, Disability, and Health (ICF), which reflects ongoing debates about the interaction between individual impairments and societal barriers. In conclusion, despite the initial obscurity and misinterpretation of Vygotsky's defectology, its rediscovery and reinterpretation across different socio-political contexts underscore its lasting significance. Even if the concept, with its negative connotations, is reframed to suit modern sensibilities, Vygotsky's defectology has proven to be a dynamic and evolving framework that continues to inspire and challenge contemporary discussions on disability, special and inclusive education.

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