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Educación ciudadana, patrimonial e inclusiva: construcción de un sistema de categorías para el análisis de experiencias didácticas

Citizenship, heritage and inclusive education: construction of a category system for the analysis of didactic experiences

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RESUMEN.
Desde un enfoque flexible, se presenta un artículo con el objetivo de construir un sistema de categorías para el análisis de experiencias didácticas en relación a la educación ciudadana, educación patrimonial e inclusión educativa. De acuerdo a este objetivo y tras la revisión de las referencias, se diseñó un sistema de categorías en relación con las tres categorías mencionadas, incluyendo modelos de ciudadanía, participación ciudadana, tipos de patrimonio, finalidades de la educación patrimonial, perspectivas de atención a la diversidad y principios para un patrimonio inclusivo. Como conclusión, en cuanto al desarrollo de la ciudadanía, existen tendencias destacadas en experiencias e investigaciones como la autonomía del individuo, la inclusión social y los derechos; incluyendo los derechos ciudadanos, la capacidad de decidir, el conocimiento y ejercicio de estos derechos, y la inclusión social en el entorno donde se desarrollan como temas fundamentales. En este proceso, la utilización del patrimonio como fuente de identidad social respetuosa con otras culturas, individuos y sociedades se enfrenta a un doble reto: tomar conciencia del poco valor que los alumnos pueden atribuir al patrimonio si no establecen alguna conexión con sus vidas y contrarrestar el uso del patrimonio como recurso como elementos diferenciados y disgregadores. Este artículo se ha basado en marco del proyecto de Investigación EPITEC2, "Patrimonios controversiales para la formación ecosocial de la ciudadanía. Una investigación de educación patrimonial en la enseñanza reglada" (PID2020-116662GB-I00), financiado por el Ministerio de Ciencia e Innovación del Gobierno de España.

PALABRAS CLAVE.
Educación ciudadana, educación patrimonial, educación inclusiva, sistema de categorías.

ABSTRACT:
From a flexible approach, it is presented an article with the objective of building a category system for the analysis of didactic experiences in relation to citizenship education, heritage education and inclusive education. According to defined objective and after the references were reviewed, a system of categories was designed in relation to the three aforementioned categories, including models of citizenship and civic participation, types of heritage, purposes of heritage education, perspectives of attention to diversity and principles for an inclusive heritage. As a conclusion, regarding the development of citizenship, there are main trends in experiences and researches such as the autonomy of the individual, social inclusion and rights; including citizens' rights, ability to decide, knowledge and implementation of these rights, and social inclusion in the environment where they are developed as fundamental topics. In this process, the use of heritage as a source of social identity respectful of other cultures, individuals and societies faces a double challenge: become aware of the little value that students can attribute to heritage if they do not establish some connection with their lives and counteract the use of heritage as a resource as differentiated and disintegrating elements. This article was elaborated within the framework of EPITEC 2 research project, "Controversial heritages for the ecosocial formation of citizenship. An investigation of heritage education in formal education" (PID2020-116662GB-I00), funded by the Ministry of Science and Innovation of the Government of Spain.

KEY WORDS.
Citizenship education, heritage education, inclusive education, category system**.**

1. Introduction.

Inclusion and equal opportunities have a high presence in pedagogical discourses; However, we must ask ourselves if professional actions are consistent with that discourse, if they promote socio-educational change or if they are fair and inclusive. The coherence between the discourse and the teaching actions is fundamental in education in general and in heritage education in particular, also considering that democratic and just societies require the participation of all citizens without exception (Schugurensky, 2009). From a socio-critical approach, professional development responds to a process of transformation and adaptation of the teaching-learning process linked to reflection from practice. In general terms, educating in a democracy for a fair, active, democratic, reflective and responsible participation through heritage education requires awareness of the importance of inclusive education. From a flexible approach, a category system is designed for the systematization of the analysis of didactic experiences on heritage education, education and inclusive education; considering the categories independently or through a triangulation process. The system includes models of citizenship and civic participation, types of heritage and purposes of heritage education, and perspectives on attention to diversity and principles for an inclusive heritage.

2. Citizenship education: models of citizenship and civic participation.

From critical approaches to the didactics of Social Sciences, connecting the learning that students build and their contributions to citizenship training (Boyle-Baise and Grant, 2001).

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Education for a fair and democratic participation requires awareness of the underlying model of citizenship in the didactic proposals. There is no a universally-accepted model of citizenship, but from an eclectic approach, citizenship may be considered:

"*A legal status that integrates the knowledge and exercise of rights and the assumption of responsibilities that materialize through active and critical participation in the different areas that make up the world today (society, economy, culture and politics); being able to transcend from the local to the global and being marked by the exercise of individual responsibilities, rights and liberties without limiting the rights of other citizens, as all citizens who assume a responsible citizenship essentially understand that equality, dialog, rejection of situations of social injustice and, ultimately, respect for human rights must be demandable in any democratic State*" (Delgado-Algarra, 2015: II).

Regarding the main citizenship models (liberal, republican, communitarian, cosmopolitan, ecological and radical) imply different considerations on rights and responsibilities, individual and community, internationalization, natural environment or ideological positions (Delgado-Algarra & Estepa-Giménez, 2017, Delgado-Algarra, Aguaded, Bernal-Bravo, Lorca Marín, 2021). The origin of **liberal citizenship** model results from the combination of the principles of Marshall's post-industrial society theory (Marshall, 1950; Freijeiro, 2005): capitalism-civil, democracy-politics and social-welfare ideas. This model places emphasis on civil (freedom, right to property and right to justice), political (right to participate in public power) and social (right to a full life) rights of each citizen and it imply the defense of free market for sustenance of democracy and individual well-being. The American political philosopher in the liberal tradition, John Rawls (1921–2002), was a significant person in a contemporary liberal approach. In general terms, liberal citizenship is mainly concerned with rights, but there is no expectation about citizens commitment in civic and political participation. **Republican citizenship** includes the shifting from a passive citizenship to active citizenship and it emphasizes the assumption of responsibilities and participation by the individual or the common good and based on ethics (Habermas, 1995). Liberal and republican traditions of democracy do not differ only in citizens consideration or participation, but also differs in criteria for the construction of common good and criteria for decision-making. **Communitarian citizenship** model focus on the construction of common goals by citizens based on dialog and citizens decision making for the solving of social problems according to community needs and the reduction of social gaps. In general terms, this model considers that citizen status is provided by the experience and ideas of individuals as members of collectives; rejecting the consideration of citizen status based on expertise, individual purchasing power or interest group (Reyes y Ortiz, 2018). There are communitarian model defenders on political left, right and center. Moreover, it opposes to individualistic focus of liberal model of citizenship. **Cosmopolitan citizenship** model goes beyond national borders advocating for a global system of universal rights and responsibilities (Held, 1995; Cortina, 1997). Regarding this and as an example, in Europe, national sovereignty coexists with the activity of supranational institutions and transnational associations of citizens; facing to nationalisms emerging communitarian citizenship. **Ecological citizenship** model focus on rights and participation processes related to the natural environment. This model considers that individual has the

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responsibility to exhibit a lifestyle that includes the reduction of ecological pressures on nature (Lummis, Morris, Lock & Odgaard, 2017; Crane, Matten & Moon, 2018). **Radical citizenship** model is based on critical theory for transformation of sociopolitical structures (Mouffe, 2005, 2017). This model considers that citizen action is inseparable from ideological positioning; considering conflict as a democratic value.

Focusing on citizenship education, regarding citizens participation and according to participation approach, there are several models (Westheimer & Kahne, 2004):

-   A **personally responsible citizen** is the one who complies with institutional and legal obligations and commits to their community by paying taxes and obeying the laws, contributing to food collection campaigns, etc.
-   A **participatory citizen** is the one who assumes leadership positions in established systems, for example, organizing food collection campaigns or collects signatures for social transformation.
-   A **justice-oriented citizen** is critical with established systems and structures when they reproduce injustices over time; focusing attention on the cause of problems.

In general terms, this participation models differentiates between responsible, active and critical members of society. According to the situations raised and the participation models on which citizenship education is constructed, it is essential to guarantee the functionality and significance of the learning; making possible the learning of higher-level contents. Thus, the importance of the problems in the curriculum, in addition to the type of questions and answers produced, will depend on the approach adopted and the concepts that articulate it; establishing two possibilities from point of view of teachers (Segal and Iaies, 1993): location of curricular proposals or construction of curricular proposals. School contexts and teaching beliefs can allow different forms of participation (Sampermans, Isac, Claes, 2018; Cheng, Leung, Yuen, Tang, 2020): participation within the classroom, participation in school governance, participation outside of school. In general terms, official policies about citizenship education are related to the development of personally responsible citizens with similar approaches about issues such as the rule of law, tolerance, diversity, internationalization and equality (Brown, Chen, Davies, Urbina, Munguia, 2021).

3. Heritage education: holistic heritage and educational purposes.

The concept of heritage was born to define those elements of history, art and archeology that should be protected. The consideration of what is heritage (and what is not) has changed depending on the times. In addition, this concept has been built over the years for the conservation of elements considered relevant, a consideration that has changed over time depending on the historical period. Authors such as González Monfort and Pagés (2005), focus their vision of the concept of cultural heritage; while other authors broaden the definition towards a holistic and systemic perspective of heritage. From the holistic perspective, heritage references are articulated as a single fact that connects the socio-natural dimensions from the perspective of social sciences and experimental sciences; considering the following types of heritage (Cuenca-López, 2002; Estepa and Cuenca, 2006; Martín Cáceres, 2012) (table 1): historical, artistic, ethnological, scientific-technological and natural.

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Table 1. Types of heritage from a holistic perspective.

AREA	Type of heritage	
Experimental / natural Sciences	Natural heritage: Environmental aspects	
	Scientific-technological heritage: Industrial components of sociocultural relevance	
Social sciences	Historical: Archaeological and documentary references	Cultural
	Artistic: Manifestations corresponding to the different stylistic movements	
	Ethnological: Significant and traditional elements that explain social change	

(Adapted from Cuenca-López, 2002).

Heritage Education must overcome disciplinary, methodological and curricular barriers in order to contribute to Environmental Education, scientific literacy, and Education for Citizenship with a global and integrated approach (Estepa, Wamba and Jiménez, 2005). It contributes to promoting respect for heritage elements among citizens in general and young people in particular (Rodríguez, Valdivia, Santos, 2022). Thus, three established general purposes of heritage education will condition the interaction of students with heritage:

- **Cultural purpose:** Knowledge of facts and information in relation to heritage of a cultural nature, illustrated and / or focused on anecdotal aspects.
- **Conservation purpose:** heritage values in everyday life (economic, identity, etc.) and promotes a purist conservation of heritage without critical approach.
- **Socio-critical purpose:** Understanding and critical and reflective knowledge of the sociocultural reality, the valuation and respect of the identity features of their own culture and that of others, as well as the education of citizens committed to social participation and sustainable development, capable of intervening in activation processes with a critical sense.

The studies by Von Borries (2009) on youths' historical knowledge have demonstrated that they construct their historical stories heavily influenced by their families, newspapers, films, TV, books, experts and tour guides, as the channels through which students receive the historical narrative devised for consumption, and this is how they construct their representations of the past. The heritage often becomes a symbol of social transformations, of social or cultural revolutions, of ruptures with the past or the claims of other eras yearned

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for in the present. In any event, the heritage is claimed or denied every time power has changed throughout history. Thus, over time, the heritage becomes a symbol of an era as well as evidence of how power was envisioned in each epoch. In reality, this is how we see not only the changes but also the things that remain the same, which are repeated by those who have held power and wanted to leave their mark on history. Heritage education should foster a critical analysis of the conservation of resources and cultural assets, commitment, responsibility and social action (Delgado-Algarra and Cuenca-López, 2020):

> "The aim of heritage education is to foster the development of critical analysis, social engagement, and commitment to the environment and the critical use of resources. School is therefore the place that is called to form students, understood as 'citizens of today', via an educational process that immerses them in knowledge of the past, so that they feel a sense of belonging to a given history, which in turn will sustain them in actively participating in the present. The objective is to form individuals with the capacity to play a participatory and active role in the construction of a composite and mindful society" (Balconi, Nigris, & Zecca, 2019, 523).

Over time, democratic power has overtaken the heritage in many countries and often turned it into a symbol of unity. This includes not only the monumental heritage related directly to the great military, political, civil or Church powers but also the more grassroots culture, represented by all kinds of popular, material, written or oral cultural expressions. This reality is also a kind of change-continuity related to the heritage. Education should help us analyse these changes and encourage future social changes, and therefore we have to analyse the past in an effort to interpret the meanings of the heritage.

3. Inclusive education: attention to diversity and principles for inclusive heritage.

From the perspective of raising awareness about functional diversity in students, it is especially relevant to attend to equal rights and the acceptance of diversity as an enriching element (Escudero and Martínez, 2011). In any community, values and meanings of heritage needs a cultural significance for all members (Juca, 2021). According to this, Schalock and Verdugo (2013) collect 8 dimensions to guarantee a good level of vital well-being: personal relationships, emotional well-being, personal development, personal well-being, self-determination, inclusion and rights. In educational, social and citizen environments, four major perspectives are considered in relation to attention to diversity (Ainscow, 2015) (Figure 1):

- **Exclusion:** where there is a general canon design such as the environment should be and it is designed and planned around it.
- **Segregation:** diversity is taken into account, but from the perspective of the differentiated group to which a response of the same nature is given.
- **Integration:** awareness of belonging to the group considered different is made and an integrated response is given within the norm.
- **Inclusion:** diversity is considered as the whole, the norm and is efficiently designed to serve it in its entirety.
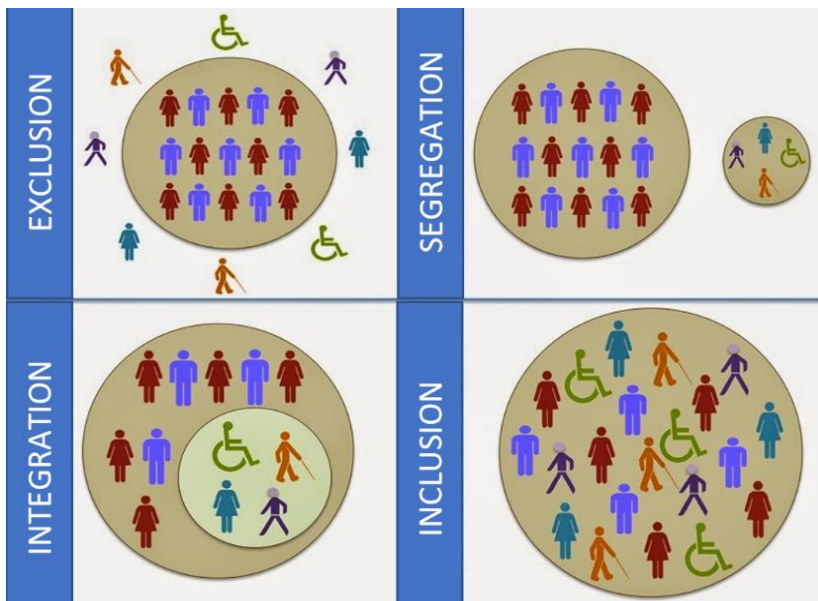
Figure 1. Models of inclusive education (Doble Equipo, 2013).

Starting from this differentiation, we are currently moving towards an inclusive perspective. Contrary to the postulates that state that accessibility and generation of inclusive environments is not profitable, current trends mark the way for their development as an added value that is present in many initiatives (Marín-Cepeda, García Ceballos and others, 2017). It is not about generating duplication, resources used by a minority or creating specific infrastructures, but rather generalizing the use of a universal design, understanding that the availability of accessibility is an added value and attracts visitors, as well as an advantage for people to reach greater autonomy. (Puyuelo Cazonlar, 2018). As Bouard (2016) argues, "it could be superfluous to remember that complex challenges require complex strategies, if it were not because socially it is difficult to recognize that the human pattern is diversity and not equality" (2016: 44).

Following Juncá (2012) regarding Universal Accessibility, which requires such diversity, it is considered as that characteristic or property of the project and the creation of environments by virtue of which it is achieved that any person has the capabilities that you have, can access and use them in conditions of comfort, security and personal autonomy; it is the counterpoint of the barriers.

The concepts of inclusion and accessibility, with regard to heritage education must be indissoluble, they cannot be included in artistic and cultural experiences if there are barriers. Two perspectives can be identified, corresponding to two different models: first, those that pose a segregated offer, with segregated groups with a reduced frequency and duration, and second, those focused on the most obvious barriers, the so-called physical ones, ignoring the cognitive and social ones. To move towards this inclusion from a universal design perspective, the elements that allow access to heritage must be accessible; grouping them into physical, cognitive, sensory, and social. These aspects are involved and encompass all interactive

facets of human development and should constitute a focus of action. The inclusive perspective of heritage goes further, in coherence with universal design (De Asís, 2013); It implies generating an environment and experiences accessible to all, this is translated into concrete principles such as (Gómez del Águila, 2012):

- **Independent mobility.** Avoid physical barriers that prevent, for example, access to a person in a wheelchair.
- **Special orientation.** without specialized guides, with resources such as 3D models or pictographic signage of the surroundings.
- **Access to each item.** Either by visual, auditory or tactile route.
- **Understanding of the expository message**. Generalized use of infographics and visual elements.
- **Personal experiences around the work**. Access to heritage in an experiential way, an aspect that makes it attractive as well as accessible.

In essence, heritage is located within the framework of an inclusive society, bringing it to a present designed for all. The right to exercise citizenship has been linked to the characteristics that allowed a person to exercise the rights that this condition provided them, this aspect limited development. From the perspective of the diversity model (Palaciones and Romañach, 2006, Cabrero and Rizzo, 2008) the concept of "capacity" is abandoned as a way of observing and describing the human reality that limited its development, substituting those of dignity, respect and recognition of physical differences and social expressions. Focusing on the field of exercising citizenship for all in schools, it is essentially about working for the development of extrinsic or legal dignity, based on the fact that all people should have the same rights and opportunities and on the importance of the school to contribute to it.

4. Category system for the analysis of didactic experiences on citizenship, heritage and inclusive education.

From a flexible approach that allows the adaptation of quantitative, qualitative and mixed research approaches, a category system is designed for the systematization of the analysis of didactic experiences for independent studies or triangulating citizenship education, heritage education and inclusive education. In this sense, this article responds to the objective of "building a category system for the analysis of didactic experiences in relation to citizenship education, heritage education and inclusive education". According to defined purpose and after the references were reviewed, a system of categories was designed. The specific structure of this categories system was based on several proposals and research (table 2):

- **Category I - Citizenship education** is based on Westheimer & Kahne, 2004; Delgado Algarra y Estepa, 2018; Wood, Taylor, Atkins & Johnston, 2018; Delgado-Algarra, Román-Sánchez, Ordóñez-Olmedo y Lorca-Marín, 2019.
- **Category 2 - Heritage Education** is based on Cuenca-Lóppez, 2002; European Association of History Teachers, 2015; Lucas y Estepa, 2016; Rivero, Fontal, García-Ceballos & Martínez, 2018; Delgado-Algarra y Cuenca-López, 2020.
- **Category 3 - Inclusive education** is based on Gómez del Águila, 2012; Ainscow, 2015; Brouard, Mestre & Merillas, 2016; Marín-Cepeda et al, 2018.

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Table 2. Categories system on citizenship, heritage and inclusive education.

CATEGORIES	SUBCATEGORIES	INDICATORS	
CITIZENSHIP EDUCATION	Citizenship models	Liberal	
		Republican	
		Communitarian	
		Cosmopolitan	
		Ecological	
		Radical	
	Citizenship participation	Responsible	
		Active	
		Critical	
HERITAGE EDUCATION	Types of Heritage	Historical	
		Artistic	
		Ethnological	
		Scientific-technological	
		Natural	
	Heritage education purposes	Culturalist	
		Conservationist	
		Sociocritical	
INCLUSIVE EDUCATION	Perspective of attention to diversity	Exclusion	
		Segregation	
		Integration	
		Inclusion	
	Principles for an inclusive heritage	Independent mobility	
		Special guidance	
		Accessibility of elements	Visual
			Auditory
			Tactile
		Understanding the message	
		Experience	

(Own elaboration).

Moreover, the design of this categories is based y several scientific resources. It has been reviewed by several colleagues and supported by the HETEIC R+D Project (2016–2020) [Heritage Education for the Territorial and Emotional. Intelligence of Citizens], EDU2015–67953–P, funded by the Spanish Ministry of Economy and Competitiveness. This categories system will facilitate the qualitative analysis of information from a systemic perspective and focusing on several aspect of the main purpose of research.

3. Conclusions.

Citizenship education should pay attention to the influence of democratic experiences in school; however further work is needed regarding how educators in practice interpret these educational policies (Brown, Chen, Davies, Urbina, Munguia, 2021). As Daniel Schugurensky (2009) indicates, participatory democracy (understood as a process of deliberation and decision-making) requires citizen participation (example, social movements); however, citizen participation can take place without participatory democracy (example, elections in representative democracies). The category system that is presented is the result of an in-depth review of multiple sources, experience and research. From our critical, holistic, and interdisciplinary approach, this tool will facilitate the tasks of analyzing didactic experiences and triangulation of citizenship education, heritage education and inclusive education. Based on a review of theory and experiences that have served as a reference to build the category system, we conclude that for the development of citizenship there are main trends related to the autonomy of the individual, social inclusion and rights; taking into account that for the exercise of citizen rights, the ability to decide, the knowledge and implementation of these rights, and social inclusion in the environment where they are developed are fundamental. In this process, the use of heritage as a source of social identity respectful of other cultures, individuals and societies faces a double challenge: it considers the low value that can be attributed to heritage without a proper connection with the lives of students and the use of heritage as a differentiating resource. One of the remarkable aspects of the theoretical references and current didactic experiences in which a connection (more or less explicit) is established between citizenship education, heritage education and inclusive education is the importance of establishing an emotional connection with a heritage (personal, family, local or national) that connects with the life experience of the students.

In general terms, we consider that in order to build an active, democratic, reflective and responsible citizenship from heritage education, scientific knowledge and a didactic approach must be considered consistent with didactics where critical capacity intervenes; including education for democratic engagement and participation from an inclusive perspective. Thus, the category system has been designed to contribute to the critical analysis of didactic experiences; considering as desirable that those experiences that allow triangulation of the three categories of analysis are designed for contextualized, efficient, functional and grounded participation, and to make possible the development of inclusive attitudes where it is shown that functional diversity is not a reason for deny a person their right to participate. In other words, all citizens, with full recognized rights, must be able to assume responsibility for the improvement of their environment if they so wish and have the opportunity to establish an emotional connection to the heritage.

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