Reviews of National Policies for Education

Review of Inclusive Education in Portugal

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Foreword

This Review of Inclusive Education in Portugal was conducted as part of OECD's Strength through Diversity project (see Annex A for further details). The purpose of the review is to support Portuguese authorities in identifying ways to improve equity and inclusion in the education system (i.e., the extent to which it promotes the inclusion of diverse learners).

Portugal was one of the countries that opted to participate in the country review strand of the project and host a visit by an external review team. Members of the OECD review team were Lucie Cerna (OECD Secretariat), co-ordinator of the review; Alexandre Rutigliano (formerly OECD Secretariat); Mel Ainscow (University of Manchester and University of Glasgow, United Kingdom) and Emmanuel Acquah (Åbo Akademi University, Finland). The biographies of the members of the review team are provided in Annex B. This publication is the report from the review team. It provides, from an international perspective, an independent analysis of major issues facing inclusive education in Portugal, current policy initiatives and possible future approaches.

The report serves three purposes: i) to provide insights and advice to Portuguese education authorities; ii) to help other countries understand the Portuguese approach to inclusive education; and iii) to provide input for comparative analyses of the OECD Strength through Diversity project. The scope for the analysis in this report covers primary (including 1st and 2nd cycle of basic education) and secondary education (including 3rd cycle of basic education and upper secondary). At the request of Portuguese authorities, the focus areas of the review in Portugal are: i) governance and financing of inclusive education; ii) capacity building; iii) school-level interventions and iv) monitoring and evaluation. Among student groups, the Portuguese authorities have requested to focus on immigrant and refugee students, students with special education needs (now referred to as students in need of additional measures), and students from ethnic minorities. The analysis presented in the report refers to the situation faced by the education system in 2021, when the review team visited Portugal (virtually in spring 2021 and in person in fall 2021). The most recent educational data used in this report reflects the situation during the 2019/20 school year though some data presented are older.

Portugal's involvement in the OECD review was co-ordinated by multiple staff members in the Ministry of Education. The National Co-ordinator was Maria João Horta, Deputy Director in the Directorate-General for Education (DGE) at the Ministry of Education. She was supported by Luisa Ucha, Advisor to the Secretary of State Assistant for Education; Filomena Pereira, Head of Special Needs Education Unit of the DGE; Florbela Valente, Deputy Director in the Directorate-General for School Establishments (DGEstE); Alexandra Figueiredo, Deputy Director of the National Agency for Qualification and Vocational Education and Training; José Vítor Pedroso, Director General of the DGE; João Miguel dos Santos Gonçalves, Director General of the DGEstE; Filipa Henriques de Jesus, President of the National Agency for Qualification and Vocational Education and Training; Nuno Rodrigues, Director General of the Directorate-General for Education and Science Statistics (DGEEC); José Manuel Passos, President of the IGeFE; Alcina Cardoso, senior officer (IGeFE); Joaquim Santos, Head of the Education Statistics Unit (DGEEC); Maria José Saragoça, senior officer (DGE); and Pedro Calado, Deputy Director of the President's Office - Gulbenkian Foundation.

The OECD and the European Commission (EC) have established a partnership that partly covers participation costs of countries which are part of the European Union's Erasmus+ programme. The participation of Portugal was organised with the support of the EC in the context of this partnership.[1] The EC was part of the planning process of the review of Portugal (participating in the preparatory visit and providing feedback on the planning of the review visit) and offered comments on drafts of this report. The involvement of the EC was co-ordinated by Antonio García Gómez, Policy Officer for Spain, Portugal and Finland in the European Commission's Education, Youth, Sport and Culture Directorate-General (DG EAC). The review team is grateful to Antonio García Gómez for his contribution to the planning of the review and for the helpful comments he provided on drafts of this report. In addition, the financial assistance of the Calousted Gulbenkian Foundation for Portugal's participation in the country review strand of the Strength through Diversity project is gratefully acknowledged, and in particular the involvement of Pedro Calado, Deputy Director of the President's Office – Calouste Gulbenkian Foundation.

The (virtual) review visit to Portugal took place between 19 April and 7 May 2021 and the in-person school visits in Portugal took place between 28 September and 1 October 2021. The itinerary is provided in Annex C. The visit was designed by the OECD (with input from the EC) in collaboration with the Portuguese authorities. It also involved a virtual preliminary visit by the OECD Secretariat on 1, 8, 10, 11, 16 and 18 December 2020 and between 18 and 22 January 2021, with the participation of Antonio García Gómez from the EC.

The review team met with João Costa, the Secretary of State Assistant and of Education; Ana Sofia Antunes, the Secretary of State for the Inclusion of Persons with Disabilities; other officials from the Ministry of Education and its associated units; representatives of national educational guidance bodies; representatives of associations of private educational providers; representatives of national school teachers' and principals' unions and associations; representatives of national associations of municipalities; national parents' associations; representatives of teachers' professional, in-service training centres; civil society organisations with an interest in children; representatives from national special education teachers' associations; and researchers with an interest in diversity, equity and inclusion in education. The team visited six schools in the five (statistical) territorial units of mainland Portugal (Lisbon Metropolitan Area [LMT], Centre, North, Alentejo and Algarve), interacting with school leaders, teachers, non-teaching staff, parents and students at each school. The six schools selected for the main visit were chosen at random from a set of pre-specified geographic, demographic and performance criteria established by the OECD review team. The intention was to provide the review team with a broad cross-section of information and opinions on inclusive education. Overall, the OECD review team held 62 meetings with approximately 200 stakeholders, including five school clusters and one private independent school serving 10 694 students.

The OECD review team wishes to record its gratitude to the many people who gave time from their busy schedules to inform the review team of their views, experiences and knowledge. The meetings were open and provided a wealth of insights. Special gratitude is due to the National Co-ordinator, Maria João Horta, for her commitment and efforts to provide the review team with the best possible conditions for this work. The courtesy and hospitality extended to us throughout our visit in Portugal made our task as a review team as enjoyable as it was challenging.

The OECD review team is also grateful to colleagues at the OECD, especially Ottavia Brussino and Cecilia Mezzanotte for analytical and statistical support, Jody McBrien and Francesca Gottschalk for editorial support, and Crystal Weise and Elisabeth Stumvoll for additional support. Daiana Torres Lima provided key administrative and layout support. Paulo Santiago, Head of the Policy Advice and Implementation Division, provided overall guidance and key feedback on the report.

[1] This document has been produced with the financial assistance of the European Union. The views expressed herein can in no way be taken to reflect the official opinion of the European Union.

This report is organised into four chapters. Chapter 1 provides the national context, with information on diversity, equity and inclusion in the Portuguese school system. Chapter 2 analyses the governance and the funding of inclusive education. Chapter 3 reviews capacity building for inclusive education in the Portuguese school system. Finally, Chapter 4 examines school-level interventions to promote inclusive education in Portuguese schools. Chapters 2 to 4 each present strengths, challenges and policy recommendations.

The policy recommendations attempt to build on and strengthen policies and practices on inclusive education that are already underway in Portugal, and the strong commitment to further improvement that was evident among those the OECD review team met. The suggestions should take into account the difficulties that face any visiting group, no matter how well briefed, in grasping the complexity of Portugal's education system and fully understanding all the issues. This report is, of course, the responsibility of the OECD review team. While the team benefited greatly from Portugal's Country Background Report (CBR) and other documents, as well as the many discussions with a wide range of Portuguese personnel, any errors or misinterpretations in this report are its responsibility.

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Abbreviations and acronyms

A3ES	*Agência de Avaliação e Acreditação do Ensino Superior* – Agency for Assessment and Accreditation of Higher Education
ACM	*Alto Comissariado para as Migrações* – High Commissioner for Migrations
AE	*Aprendizagens Essenciais* – Essential Learning
AFC	*Autonomia e Flexibilidade Curricular* – Curriculum Autonomy and Flexibility
ANQEP	*Agência Nacional para a Qualificação e o Ensino Profissional* – National Agency for Qualification and Vocational Education and Training
ASE	*Ação Social Escolar* – School Social Assistance
ATE	*Apoio Tutorial Específico* – Specific Tutorial Support
CEF	*Cursos de Educação e Formação* – Education and Training Courses
CERCI	*Cooperativa Educação Reabilitação de Cidadãos com Incapacidades* – Education and Rehabilitation Cooperative for Citizens whith Disabilities
CEFR	Common European Framework of Reference for Languages
CFAE	*Centro de Formação de Associação de Escolas* – School Association Training Centres
CH	*Crédito Horário* – Credit Hours
CME	*Conselho Municipal de Educação* – Municipal Council for Education
CNE	*Conselho Nacional de Educação* – National Council for Education
CPCJ	*Comissões de Proteção de Crianças e Jovens* – Commissions for the Protection of Children and Youngsters
CRI	*Centro de Recursos para a Inclusão* – Resource Centre for Inclusion
CRPD	Convention on the Rights of Persons with Disabilities
CRT	Culturally Responsive Teaching

CRTIC	*Centro de Recursos de Tecnologias da Informação e Comunicação para a Educação Especial* – Resource Centre for Information and Communication Technology for Special Education
CTN	*Conclusão no tempo esperado* – Conclusion within the expected time
DGAE	*Direção-Geral da Administração Escolar* – Directorate-General for School Administration
DGE	*Direção-Geral da Educação* – Directorate-General for Education
DGEEC	*Direção-Geral de Estatísticas da Educação e Ciência* – Directorate-General for Education and Science Statistics
DGEstE	*Direção-Geral dos Estabelecimentos Escolares* – Directorate-General for Schools
EC	European Commission
ECD	*Estatuto da Carreira dos Educadores de infância e dos professores dos ensinos básico e secundário* – Statute of the Career of Early Childhood Educators and Teachers of Basic and Secondary Education
ECEC	Early Childhood Education and Care
ECTS	European Credits Transfer and Accumulation System
ED	*Ensino a Distância* – Distance Learning
EFA	*Educação e Formação de Adultos* – Adult Education and Training
EMAEI	*Equipa Multidisciplinar de Apoio à Educação Inclusiva* - Multidisciplinary Team for Inclusive Education
ENEC	*Estratégia Nacional da Educação para a Cidadania* – National Strategy for Citizenship Education
ENICC	*Estratégia Nacional de Integração das Comunidades Ciganas* – National Strategy for the Integration of Roma Communities
ENIND	*Estratégia Nacional para a Igualdade e Não Discriminação* – National Strategy for Equality and Non-Discrimination
ENIPD	*Estratégia Nacional para a Inclusão das Pessoas com Deficiência* – National Strategy for the Inclusion of People with Disability
ESCS	Economic, Social and Cultural Status
ESF	European Social Fund
ETUCE	European Trade Union Committee for Education
EU	European Union
FNE	*Federação Nacional da Educação* – National Federation of Education
GDP	Gross Domestic Product

GCE	Global Citizenship Education
HEI	Higher Education Institution
IAVE	*Instituto de Avaliação Educacional* – Institute for Educational Evaluation
ICMEE	International Coalition for Multilingual Education and Equity
ICT	Information and Communication Technology
IEP	Individual Education Plan
IGEC	*Inspeção-Geral da Educação e Ciência* – Inspectorate-General for Education and Science
IGeFE	*Instituto de Gestão Financeira da Educação* – Institute for the Management of Educational Finance
IMH	*Igualdade entre Mulheres e Homens* – Equality between Women and Men
ISCED	International Standard Classification of Education
IPAA	Inclusive Pedagogical Approach in Action
IPP	Inclusive Practice Project
ITE	Initial Teacher Education
LGBTQI+	Lesbian, Gay, Bisexual, Transsexual, Queer, Intersex, etc.
MENA	*Menores Estrangeiros Não Acompanhados* – Unaccompanied Foreign Minors
MCTES	*Ministério da Ciência, Tecnologia e Ensino Superior* – Ministry of Science, Technology and Higher Education
MOOC	Massive Open Online Courses
MoE	Ministry of Education
MTSSS	*Ministério do Trabalho, Solidariedade e Segurança Social* – Ministry of Work, Solidarity and Social Security
NGO	Non-Governmental Organisation
NRIS	National Integration Strategies
ODDH	*Observatório da Deficiência e Direitos Humanos* – Disability and Human Rights Observatory
OECD	Organisation for Economic Cooperation and Development
OIEC	*Orientação sexual, Identidade e Expressão de género, e Características sexuais* - Sexual orientation, gender Identity and gender Expression, and sexual Characteristics
PAE	*Plano de Ação Estratégica* – Strategic Action Plan
PALOP	*Paises Africanos de Língua Portuguesa* – Portuguese-speaking African Countries

PCA	*Percurso Curricular Alternativo* – Curriculum Alternative Pathway
PDC	*Percursos Diretos de Sucesso* – Direct Successful Paths
PDPSC	*Plano de Desenvolvimento Pessoal, Social e Comunitário* – Personal, Social and Community Development Plan
PE	*Programa Escolhas* – Choices Programme
PEI	*Programa Educativo Individual* – Individual Education Programme
PIICIE	*Plano Integrado e Inovador de Combate ao Insucesso* – Integrated and Innovative Programme to Combat School Failure
PIEF	*Programa Integrado de Educação e Formação* – Integrated Education and Training Programme
PIT	*Plano Individual de Transição* – Individual Transition Plan
PISA	Programme for International Student Assessment
PLNM	*Português Língua Não Materna* – Portuguese as a Second Language
PNA	*Plano Nacional das Artes* – National Plan for Arts
PNPSE	*Programa Nacional de Promoção do Sucesso Escolar* – National Programme for the Promotion of School Success
POCH	*Programa Operacional Capital Humano* – Human Capital Operational Programme
PPM	*Plano Plurianual de Melhoria* – Plurennial Improvement Plan
PSL	Portuguese Sign Language
REEI	*Rede de Escolas para a Educação Intercultural* – Network of Schools for Intercultural Education
SEN	Special Education Needs
STP	Supervised Teaching Practice
TALIS	Teaching and Learning International Survey
TEIP	*Território Educativos de Intervenção Prioritária* – Priority Intervention Educational Territories
TIMMS	Trends in International Mathematics and Science Study
UN	United Nations
UNESCO	United Nations Educational, Scientific and Cultural Organisation
VET	Vocational Education and Training

VMVD	*Violência contra as Mulheres e Violência Doméstica* – Violence against Women and Domestic Violence

Executive summary

This Review of Inclusive Education in Portugal was conducted as part of the OECD Strength through Diversity project. Based on the project's framework, it analyses how to promote inclusive education in Portugal through dedicated policies and practices in the following areas: governance, resourcing, capacity building, school-level interventions, and monitoring and evaluation. The analysis presented refers to the situation faced by the Portuguese education system in 2021, when the review team held a series of meetings with stakeholders and visited schools in mainland Portugal. The most recent statistical data in the report reflect the situation during the 2019/2020 school year, although some data are from previous school years.

Portugal has made important progress in establishing a strong framework for inclusive education that is focused on responding to the needs of all students. In 2018, Decree Law 54/2018 on Inclusive Education was enacted, accompanied by Decree Law 55/2018 on Autonomy and Curriculum Flexibility as well as a series of guiding documents. This new framework sees inclusive education as a process under which the education system must be reformed and continually challenged so that it can adapt to the needs of all students. This process is ongoing in Portugal, although inevitably it has been slowed down by the COVID-19 pandemic.

Key findings

The Portuguese education system has witnessed historic improvements in access and attainment over the past 25 years. Nearly all school-aged children are enrolled in compulsory education since the 2009 extension of compulsory schooling to 18 years of age. During this period, Portugal has also shown significant improvement in overall student performance. It is one of the few countries with a positive trajectory of improvement in all subjects: reading, mathematics and science, assessed by OECD's Programme for International Student Assessment (PISA). Finally, the rate of early leavers from education reduced significantly in Portugal, in spite of great variations between regions.

Despite these impressive accomplishments, Portugal faces some challenges to achieve an inclusive education system. Important differences in student learning and well-being outcomes persist for students from disadvantaged and/or diverse backgrounds, students from low-income families, students with an immigrant background and students from Roma communities.

Priority areas and recommendations for next steps

The OECD review team identified three priority areas for improving Portugal's inclusiveness of the education system, with an additional priority of strengthening monitoring and evaluation of inclusive education interwoven across all the chapters. The key strengths and challenges in each of the areas are summarised below and elaborated in subsequent chapters, which also have detailed short- and long-term policy recommendations.

Priority 1: Strengthening the governance and financing of inclusive education (Chapter 2)

Since 2018, Portugal has developed a comprehensive legal framework on inclusive education, although there have been earlier efforts to promote equity and inclusion since the 1980s. This has involved significant efforts to grant more flexibility and autonomy to local actors, including schools. Moreover, many programmes, structures and human resources are now available to support equity and inclusion. However, challenges remain regarding the management of these resources, the administration of inclusive education at all levels, and the shift of the approach to inclusive education from group-focused to across the board.

The OECD review team offers the following recommendations to help Portugal overcome challenges related to the governance and financing of inclusive education:

- Recommendation 1: Improve the governance of inclusive education through better synergies and accountability mechanisms between the different levels of the education system.
- Recommendation 2: Sustain collaboration and consultation strategies to broaden the understanding of inclusive education.
- Recommendation 3: Improve the management of resources for inclusive education and continue efforts to build a coherent funding system to support equity and inclusion.
- Recommendation 4: Strengthen the management of system-level monitoring and evaluation of inclusive education.

Priority 2: Developing capacity for diversity, equity and inclusion in education (Chapter 3)

In the past few years, Portugal has implemented progressive measures aimed at addressing diversity among students and providing support for teachers and broader school personnel to develop and improve their professional practice. However, important challenges remain, such as inadequate initial teacher preparation and continuous professional learning for diversity, equity and inclusion and a narrow view of diversity, largely focused on students with special education needs (SEN).

The OECD review team offers the following recommendations to help Portugal overcome challenges related to developing capacity for inclusive education:

- Recommendation 1: Identify and build on good practices to promote collaboration and capacity building to address all dimensions of diversity.
- Recommendation 2: Expand continuous professional learning opportunities for teachers to support diversity and inclusion.
- Recommendation 3: Implement multicultural teacher education to mainstream diversity, equity and inclusion courses.
- Recommendation 4: Improve the recruitment, retention, and attractiveness of the teaching profession to strengthen inclusive education.
- Recommendation 5: Promote the recruitment of teachers from diverse ethnic, cultural and linguistic backgrounds.

Priority 3: Promoting school-level responses to student diversity (Chapter 4)

In Portugal, there is widespread commitment to the principles of diversity, equity and inclusion across the education system, but practices in schools vary considerably. Examples of effective practices exist that can be built upon to address these inconsistencies. There are also significant human resources that can be mobilised to support such developments. The well-established school clusters offer possibilities for

supporting the development of more inclusive arrangements. However, there are challenges around the use of resources in schools that encourage separate arrangements, limited professional learning opportunities for teachers and school leaders, a lack of local area coordination, and limited strategies for monitoring and evaluation of policies and practices.

The OECD review team offers the following recommendations to help Portugal overcome challenges related to school-level responses to student diversity:

- Recommendation 1: Introduce a programme of professional learning that is focused on the promotion of inclusive classroom practices.
- Recommendation 2: Formulate clear guidance on the use of support resources within schools and communities.
- Recommendation 3: Ensure that there is a coordinated structure of local support to schools and school clusters in promoting equity and inclusion.
- Recommendation 4: Strengthen strategies for monitoring and evaluating inclusive education practices at the local and school levels.

Assessment and recommendations

Educational context

Educational outcomes in the Portuguese education system have improved but there remain challenges in terms of grade repetition and disparities between regions

In the past three decades, the Portuguese education system has witnessed significant improvements. The share of 25-64 years-olds in Portugal who completed at least secondary education increased from 20% in 1992 to 47% in 2016 and 55% in 2019. The upper secondary out-of-school rate decreased from 17% in 2005 to less than 1% in 2019, the lowest rate among OECD countries. In addition, at least 90% of the students aged 4 to 17 were enrolled in education in 2019, while in 2010, at least 90% of the students aged 4 to 14 were enrolled in education. Furthermore, 15-year-old students in Portugal saw significant improvements in their reading, mathematics and science abilities as measured by the OECD Programme for International Student Assessment (PISA) between 2006 and 2015, although there was a slight decrease in reading and science in 2018. In reading, the score increased from 472 in 2006 to 496 in 2015 and 492 in 2018; in mathematics, it increased from 466 in 2006 to 492 in 2015 and remained stable in 2018; in science it increased from 474 to 501 in 2015 but decreased to 492 in 2018. In 2018, the score of Portuguese students was close to the OECD average in all subjects. However, the Portuguese education system still faces considerable challenges. For example, grade repetition is a major concern in Portugal. In PISA 2018, 26.6% of 15-year-old students reported having repeated a grade at least once in either primary or secondary education, which places the country considerably above the OECD average of 11%. There are also significant variations between regions. For instance, in 2019 there were on average 7.9% early school leavers in the Centre, but 19.9% in the Algarve.

Nearly all students are enrolled in mainstream schools, which are increasingly diverse, but students' backgrounds have a significant impact on outcomes

According to PISA 2018, on average across OECD countries, 13% of students had an immigrant background, compared to 10% in 2009. In Portugal, about 7% of students had an immigrant background in 2018, up from 5% in 2009. The High Commissioner for Migrations (*Alto Comissariado para as Migrações*, ACM) estimates that during the 2018/2019 school year, there were 52 641 students with a foreign nationality in Portuguese schools, which represents an increase of 18.5% from the previous school year. In Portugal, an exceptionally high rate of students with special education needs (SEN) attend mainstream schools. The latest available data show that, in 2018, 98.9% of students with SEN were enrolled in mainstream schools, while the remaining 1.1% of students were enrolled in private special schools.

However, while there have been considerable improvements in participation among diverse student groups and improvements in attainment and performance across the general student population, students' background and personal characteristics still have a significant impact on their educational outcomes. PISA shows that socio-economic background and immigrant background are strong predictors of student performance. For example, in PISA 2018, the socio-economic gap in reading performance was 95 points

in favour of advantaged students in Portugal, compared to 89 on average across the OECD. This gap was 26 points between non-immigrant and immigrant students in Portugal, slightly higher than the OECD average (24 points). Students from disadvantaged socio-economic background are more likely to repeat grades and less likely to complete education within the expected time. While data on students from Roma communities are scarce, available international and national studies suggest that enrolment and attainment rates are significantly lower than the average and that these students are significantly more likely to repeat grades and drop out of school. Furthermore, national data suggest that students with SEN are significantly more likely than students without SEN to be early leavers from education.

Strengths and challenges

Portugal has a comprehensive inclusive education framework; however, the education system remains mainly oriented towards the inclusion of students with special education needs (SEN)

Portugal has a long history of promoting the integration of students with SEN into mainstream schools, which started in the 1970s and intensified in the 1990s. Decree Law No. 3/2008 defined specialised support for the inclusion of students with SEN in mainstream schools. However, since most of the focus of inclusion was on students with SEN, further efforts followed to include all diverse students in mainstream schools. This led to the implementation of Decree Law No. 54/2018 on inclusive education. While a broad vision of inclusion in education is still lacking in most countries worldwide, Portugal is among a handful of countries that have inclusive education laws covering all learners. Portugal is also making efforts to abandon student labelling and create new categories based on the type of support measures students receive rather than personal characteristics. Diversity and inclusion permeate legal and policy documents and education programmes, such as the Decree Laws No. 54 and 55, the Student Profile at the End of Compulsory Schooling, the National Strategy for Citizenship Education and the National Arts Plan, among others. This creates remarkable comprehensiveness in the legal and policy realm around issues of diversity and inclusion in education.

While the Portuguese legal framework has broadened the scope of inclusive education to all students, many stakeholders still understand it as the inclusion of students with SEN. This might stem from decades of policy efforts on mainstreaming these students. In fact, there seems to be some resistance to broadening the concept of inclusive education. During the visit, the review team repeatedly heard that it is challenging to change mentality as the system is still oriented towards supporting students with SEN in different ways. For example, even though most special schools were converted into Resource Centres for Inclusion, many of the staff are still professionals specialised in SEN. However, special education teachers are now considered specialist resources for schools, mainstream teachers and students, and thus expected to support all students. As a result of the composition of the multidisciplinary teams, students with an immigrant or ethnic minority background might be less of a priority and suffer from a lack of support due to a certain resistance and lack of preparedness in the education system.

Education authorities conduct consultations on inclusive education with key stakeholders, but both horizontal and vertical collaboration could be strengthened

The adoption of Decree Law No. 54/2018 on inclusive education followed a rigorous evaluation process of the past ten years' policies and practices and a broad national consultation. In preparation, a working group was established which was composed of State Secretaries and representatives from various organisations (e.g. Education, Inclusion of Persons with Disabilities, Health, Social Security, Employment, Schools Council, National Institute for Rehabilitation). These engaged with many stakeholders including academics, teachers and teacher unions, parents' associations, organisations for disabled persons and the general

public. Public consultations on the draft law took place both in writing and through several open talks organised across the country. Another key example for consultations with stakeholders is the consensus-building that has taken place concerning the Student Profile at the End of Compulsory Schooling. Expert consultations and meetings with teachers, administrators and parents have all provided crucial information and created stakeholder buy-in. Critically, this process has also involved students themselves, from the youngest ages. Nonetheless, despite efforts to consult a wide range of stakeholders, the OECD review team formed the impression that some stakeholders were not, or not regularly, consulted. This was, for example, the case of some civil society organisations representing Roma communities or people with an immigrant background, although Roma students and students with an immigrant background are among the groups who face the most significant challenges in education. Likewise, collaboration between the Ministry of Education (MoE) and other key central stakeholders seems to be limited.

There has been an increase in the autonomy of schools and local authorities but there is a lack of clarity and coherence regarding the responsibilities for and administration of inclusion in education

Portugal has started a process to transform its education system towards more inclusion to adapt and respond to the needs of all students. As such, most actors involved in the governance of the education system have a role to play in promoting equity and inclusion; a wide range of agents and institutions take responsibilities for and govern equity and inclusion in education. While in 2017 Portugal had the second highest most centralised education decision-making of OECD countries and economies, there has been a decentralisation process underway since the 1980s, which has intensified recently. Granting municipalities and schools autonomy and flexibility allows them to adapt the law of inclusion and other decrees to their local contexts. This may have helped develop greater capacity at school and local levels to implement rapid responses to different challenges. However, there is a substantial lack of clarity and coherence regarding the responsibilities for and administration of inclusion in education between different levels of governance. Specifically, there are inconsistencies regarding the decentralisation process and a lack of coordination between the different levels of the system. Some challenges remain as the process of decentralisation is rather slow and limiting. Furthermore, during the review team visits, actors on the ground were aware only to a limited extent of the existence of regional teams appointed by the MoE to support schools in the implementation of curricular autonomy and flexibility. The review team also observed some disconnect between schools and central education bodies. In this context, it is challenging to identify how accountability works between the different levels.

There is a significant number of programmes, structures and human resources available to support equity and inclusion in education, but challenges remain regarding their management

Portugal draws on a wide range of national and European funding programmes to support students. Under some of these programmes, schools can design their own plans or strategies to promote inclusion and school success. Portugal has implemented several programmes to support disadvantaged students and ensure equity in education, which is a prerequisite to build an inclusive education system. The School Social Assistance provides substantial support to students from low socio-economic backgrounds. Following the first lockdown due to the COVID-19 pandemic, the country made significant effort to distribute computers and internet connection to all students, while building on existing partnerships and structures to ensure the continuity of learning. Schools resourced through these programmes, in particular schools in the Priority Intervention Educational Territories Programme (*Territórios Educativos de Intervenção Prioritária*, TEIP), were able to implement activities and practices which, while targeting all students, benefited some vulnerable groups such as Roma students or students with an immigrant background. As such, schools seem, to some extent, to receive extra human resources that are adapted to their needs as

well as support to train these human resources. There is also a significant amount of resources and funding available to support students with SEN.

Nonetheless, there seems to be limited coherence of the funding system, which lacks transparency, and of coordination of human resources. In terms of available resources and resource allocation, a fundamental challenge might lay in the capacity of some municipalities to provide additional resources for schools to promote equity and inclusion. The ongoing decentralisation process, which varies across municipalities, might create some imbalances not only in terms of responsibilities and autonomy, but also in terms of funding. This can lead to highly unequal support to schools across the country. Furthermore, the review team heard about the lack of monitoring and evaluation culture in Portugal, which can create challenges to evaluate whether mechanisms and resources for inclusive education are effective. The review team gained the impression that there is lack of clarity at the local level about responsibilities for coordinating and monitoring what happens in schools. This makes it difficult to establish clearly the types and amount of resources and support allocated to schools that are being used to promote the inclusion and success of all students. It can also weaken governance, monitoring and accountability mechanisms and hinder the development of coordinated policies in a streamlined system. Stakeholders demand more resources at the local level, but substantive evaluation and intervention strategies are often missing.

Teachers in Portugal are highly qualified and value inclusive education; however, initial teacher education (ITE) does not prepare them sufficiently to deal with diversity, equity and inclusion

Evidence shows that teachers of some of the most successful education systems are highly qualified, with a master's degree qualification in teaching. Since the enactment of Decree Law No. 79/2014, all teachers, including pre-school, basic and upper secondary education in Portugal, must obtain a master's degree in teaching to enter the profession. Data from the 2018 OECD Teacher and Learning International Survey (TALIS) show that Portuguese teachers are among the most qualified within the OECD with 93.4% of teachers having acquired ISCED level 7. Furthermore, nearly all school staff the review team talked to demonstrated a genuine commitment to equity and inclusion and a profound awareness of inclusive education and diversity. However, the review team gained the impression that teachers often feel unprepared to deal with diversity in schools. The lack of requirements for ITE curricula to include areas related to diversity, multiculturalism and inclusion came up frequently during interviews with stakeholders. The coverage of these areas is at the discretion of faculties of teacher education. While there seem to be pockets of optional courses on diversity at various teacher education departments, the majority of these courses tend to focus heavily on conceptualisations of diversity and do not provide any in-depth analysis of how culture, language and identity affect learning. Reasons for not including diversity and inclusion-related ITE courses might include lack of sufficient time to cover all content considered necessary for initial teacher education, which made it challenging to introduce any additional content to address inclusion and diversity. Furthermore, in many countries, including in Portugal, ITE courses on areas related to diversity and inclusion are mainly electives and often focused exclusively on SEN.

There are various structures and offers for continuous professional learning, but these might put considerable burden on teachers and lack practical training

Through a review of official policy documents and legislation as well as interactions with stakeholders, the OECD review team discovered several structures in place in the Portuguese education system that can be built upon to promote capacity building with regard to equity and inclusion in education. The school clusters system in Portugal is well-established and can be instrumental in introducing new thinking and practices. There is considerable evidence that suggests that partnerships and networks of schools can be an effective mechanism for innovation. Another venue is the School Association Training Centres (*Centros de Formação de Associações de Escolas*, CFAEs), which are tasked with the design and implementation of

training for school clusters in cooperation with the schools. This approach ensures that CFAEs tailor professional learning to meet the needs of the school cluster they are linked to. Within schools, the existence of multidisciplinary teams (*Equipas Multidisciplinares de Apoio à Educaçao Inclusiva*, EMAEI), introduced by Decree Law No. 54/2018, was highlighted as a key cornerstone in school-level implementation of policies and practices for diversity, equity and inclusion. The EMAEI brings together professionals from within and beyond the school, including teachers, psychologists, social workers and health professionals who work collaboratively in identifying and meeting the needs of students requiring support measures. Nonetheless, in Portugal, teachers are required to participate in a considerable amount of professional training activities that have direct implications for salary increment and career progression. They often do so in their spare time and at their own cost. The review team was repeatedly told that continuous professional learning activities were too theoretical and often a burden rather than a learning opportunity. Teachers' knowledge, skills, attitudes and dispositions have direct and serious implications for the success of the students they teach. It is therefore important to think of professional learning more broadly as a stimulus for innovation rather than a "box-ticking" exercise.

The centralised teacher recruitment and allocation system as well as teacher evaluation strategies lead to insecurity that might have a negative impact on equity and inclusion in education

Concerning the appointment of teachers, Portugal has a centralised system of recruitment and placement. Newly graduated teachers and those in the field who want to join the public school network have to apply for permanent positions (civil servants) or fixed–terms. For newly graduated students who most often only secure fixed-term contracts, this means having to apply for vacant positions every year. This can be disincentivising when coupled with pressures from workload (both teaching and non-teaching) and demands for professional learning. Furthermore, this centralised decision-making process regarding the appointment of teachers to schools leaves no room for schools, educational institutions or school leaders to consciously shape the profile of their teams to support the local context and needs. During online interviews with stakeholders, several stakeholders familiar with the recruitment system in Portugal raised a number of concerns about the current system and, in particular, the fixed-term contracts including the fact that it affects the stability of the teaching staff of schools, the expertise of the teaching and non-teaching staff, especially those of the multidisciplinary teams, and overall cohesion of the schools. Furthermore, the review team gathered evidence showing that the evaluation process was problematic. Several sources indicated that the process was not transparent. In this regard, several stakeholders pointed out that there were no criteria for how the scoring, based on the rating insufficient, regular, good, very good or excellent, is done. The scoring itself is arbitrary as teachers are not given reasons for why one person gets an excellent and another, a pass. This creates unhealthy competition and conflict between schools as gaining a high grade of excellence has bearings on the image of individual teachers and the school as a whole, thus raising questions of equity and fairness. The process was described as very bureaucratic and not linked to teachers' professional development needs or well-being in any way. These challenges seem to have a significant impact on the ability of teachers to respond to diversity within the classroom as many of them change schools regularly and/or may lack incentive and guidance to promote inclusion in the classroom.

The widespread awareness and acceptance of national educational equity and inclusion policies provide a sound basis for developments in schools; however, there is varying implementation of the inclusive education policy framework at the school and local levels

The OECD review team conducted discussions with a broad range of stakeholders from different levels and backgrounds. A striking feature of these discussions was the widespread awareness and acceptance of the principles upon which the national education policies are based. Particularly impressive was the way in which children and young people talked about their pride at being students in a school that is inclusive. Some also talked of the value they gained from being involved with such a diverse range of classmates. At the same time, there is a high level of awareness of the dangers associated with using labels in referring to potentially vulnerable groups of students. Frequent mention was also made to the political history of the country that has influenced the concern for seeing education as a basis for fostering democracy. During virtual meetings with stakeholders and school visits, the review team gained a strong impression that there are considerable variations between schools, school clusters and localities across the country in regard to the ways in which the principles of equity and inclusion are being implemented. This suggests that local factors are influencing the ways in which the policy is being interpreted and acted upon. For example, there are great variations in the student composition and social segregation across education settings in Portugal. The impression gained by the review team is that classroom practices vary considerably, within and between schools. Some examples were noted of teachers using the sorts of collaborative learning approaches that are known to encourage greater participation amongst students. Meanwhile, some teaching involves a step-by-step pattern, following workbooks, usually chosen at the cluster level. The concern is that this approach may restrict the discretion of teachers to vary their practices in response to student diversity. There is also a worry expressed by some respondents that these books may not show sufficient sensitivity to the diversity that exists within the community.

While most students are in mainstream schools with access to significant resources for the inclusion of students with SEN, current resource use tends to promote strategies that may lead to separate arrangements for students

A significant amount of resources and funding are available to support students with SEN, now included in the broader category of “students in need of support measures”. This, coupled with an increasing number of students identified as in need of such measures, highlights the necessity of continually mobilising resources for these students. The OECD review team heard, for example, that in 2020/21, there were 7 122 teachers in specific roles supporting learning and inclusion. Specialised support in Portuguese mainstream schools is usually provided by special education support teachers, professionals linked to local Resource Centres for Inclusion (*Centros de Recursos para a Inclusão*, CRIs) or specialised professionals hired directly by the schools. Specialised support staff provide a range of therapeutic supports, including psychological support as well as speech, occupational and rehabilitation/physical therapy. However, much of this support is provided individually or for small groups of students outside of the mainstream classroom. These responses involve the continued use of what is sometimes referred to as a “medical model” of assessment, within which educational difficulties are explained mainly in terms of a student's deficits. This prevents progress in the field, not least because it distracts attention from questions about why schools fail to teach so many students successfully. Portugal is making an effort to move away from this model, including by abandoning labelling. As mentioned, the notion of students with SEN is being replaced by the notion of students in need of specific support measures for learning and inclusion, which aims to broaden the scope and avoid pointing to students’ deficits. The recognition that inclusive schools will not be achieved by transplanting special education thinking and practice into mainstream contexts opens up new possibilities. Many of these relate to the need to move from the individualised planning frame to a perspective that seeks to personalise learning through an engagement with the whole class, using approaches such as cooperative learning.

The cluster system offers possibilities for the coordination of school-to-school support in order to promote the development of inclusive practices but there is limited collaboration across the education system

The well-established pattern of schools working in clusters is a particular strength in relation to the promotion of inclusive practices and forms of organisation that support the introduction of these ways of working. Many other countries are seeking to establish similar arrangements, building on research suggesting that collaboration between schools has an enormous potential for fostering their capacity to respond to student diversity. More specifically, research shows how such partnerships can help to reduce the polarisation of schools, to the particular benefit of those students who are marginalised at the edges of the education system, and whose progress and attitudes about schooling cause concern. During the visits, the review team heard many positive examples of informal and structured collaboration amongst schools and within clusters that can be built upon. However, some of those the review team spoke to suggested that, overall, collaboration is not a strength of the education system. Also, during the visits no examples were found of school-based collaborative professional learning activities being organised. This relative weakness was referred to in regards to different sub-levels of the system: amongst school staff, within school clusters and between municipalities. Mention was also made of school staff lacking the time to create and participate in collaborative activities, which points to the importance of strategic leadership in making this happen.

Despite efforts to collect data and evaluate some programmes, there is a lack of coherent strategy to monitor and evaluate equity and inclusion in education

Portugal has a well-established system for using statistical data to monitor the impact of policy in the field. Consistent with the principle that it is not necessary to categorise in order to intervene, this system focuses on the level of support provided for students, which reflects the principle that “all students are equal”. In addition, some programmes, such as TEIP or the National Programme for the Promotion of School Success (*Programa Nacional de Promoção do Sucesso Escolar*, PNPSE), are now closely monitored each year. However, there is a lack of system-level coherent strategy to monitor and evaluate equity and inclusion in education, although Decree Law No. 54/2018 requires such a strategy. Furthermore, the impression gained by the OECD review team is that the use of evidence for monitoring and evaluating the implementation and impact of the national reform agenda at the local area and school levels is not well developed. This is a significant weakness that appears to be obstructing progress in the field. The review team also heard reports indicating that there are ineffective strategies in place for monitoring schools to identify and intervene in the contexts that are a cause for concern.

Short-term policy recommendations

Improve the governance of inclusive education through better synergies and accountability mechanisms between the different levels of the education system

Portugal has been making significant efforts to transform its education system towards a more equitable and inclusive system. Nearly all students attend mainstream schools, irrespective of their personal characteristics or backgrounds. Besides the new inclusive education framework, the country has implemented various policies and programmes for students facing barriers and most educational actors from the different levels of the system are aware and supportive of educational priorities, laws and policies. In addition, the country has begun a decentralisation process to grant more autonomy and flexibility to local actors, mainly municipalities and schools. Nonetheless, there is a substantial lack of clarity and coherence regarding the responsibilities for and administration of inclusion in education between different levels of governance. Specifically, there are inconsistencies regarding the decentralisation process and a

lack of coordination between the different levels of the system. Portugal should consider better defining responsibilities at the different levels of education and clarifying the decentralisation process with local stakeholders. The MoE should also consider improving the synergies between the different levels of education. It should develop a stronger middle-tier, with a certain decision-making power and coordinating influence. Such a structure, beyond supporting schools with the implementation of the new inclusive education framework, might be instrumental in promoting local autonomy and flexibility, while ensuring ongoing vertical coordination as well as efficient accountability strategies. In fact, developing a comprehensive accountability system will be crucial to ensure an effective education governance and to promote innovation in education. In this context, the role of regional teams for curricular autonomy and flexibility could be rethought and strengthened.

Sustain collaboration and consultation strategies to broaden the understanding of inclusive education

Effective governance works through building capacity, open dialogue and stakeholder engagement. In the area of inclusive education, Portugal has been engaging with a variety of stakeholders through different collaboration and consultation strategies. These participatory governance mechanisms could be strengthened. This requires working with less active or less confident stakeholders to build capacity and empowerment to take part in the process. It is also important to move beyond consultation to a higher level of engagement through collaboration or partnerships between the MoE and other institutions. Such partnerships can help provide the necessary support and mechanisms to implement inclusive policies in schools. Portugal might consider going beyond guidelines and strengthening its collaboration and consultation strategies with a wider range of stakeholders and organisations (especially with Roma associations and associations supporting immigrants and refugees) to broaden the understanding of inclusive education and ensure that all students are sufficiently supported. This is also related to the need to build the capacity of stakeholders to assume their roles and deliver on their responsibilities so that policies and laws can be implemented effectively in schools and classrooms.

Identify and build on good practices to promote collaboration and build capacity to address all dimensions of diversity

An examination of the current implementation of inclusive education in Portuguese schools shows that the main focus until now has been bringing all students together in mainstream classrooms for the majority of the day. Currently, in practice, although most school staff are aware of the new inclusive education framework, the term “inclusive education” is still largely understood with respect to the mainstreaming of students with specific education needs in Portugal. The review team noted, however, that there exist many good practices within the system that promote diversity, equity and inclusion in education more broadly. The country could benefit from thinking about ways in which existing successful inclusive education practices can be identified and scaled up to build capacity across all schools and clusters and for all students. For instance, Portugal could benefit from identifying outstanding schools in terms of inclusive practices like some schools visited by the review that were particularly striking in relation to their inclusive culture. At the national level, with an inclusive education policy in place that clearly articulates and supports inclusive education, Portugal should consider implementing periodic reviews of inclusive programmes in schools. There should also be concerted efforts nationally to continue to review school textbooks and ensure curriculum modification and adjustment becomes a widespread practice in order to meet not just the specific needs of students with SEN but also other aspects of diversity including those with immigrant backgrounds and from Roma communities. As in many European countries, the inclusion of Roma students is a major challenge in Portugal. While there is recognition and willingness at the national level to better support Roma integration into society, there is a need to carve out a strategy that can work with this community. Building the capacity of Portuguese schools to support the inclusion of the Roma community is crucial as the review team gained the impression that the inclusion of children and youth belonging to

Roma communities in Portugal presents a challenge that has not yet been fully confronted. A strategy/practice that is actually being implemented in some Portuguese schools and that could be explored further is the concept of cultural mediators. These cultural mediators can serve as mentors and role models to younger generations.

Expand the National Strategy for Citizenship Education to include social justice education

As part of Citizenship Education, Portugal included topics that aim to introduce students to a broad range of issues around diversity and cultural awareness to develop respect and acceptance of other cultures, ethnicities and national minorities as well as gender identity and sexual orientation. While these are important first steps, the current focus portrays a lack of a holistic approach to the questions of diversity, equity and inclusion. The ability of the National Strategy for Citizenship Education to contribute to develop clear and fair systems actively affirming the rights of diverse students, including students with an immigrant background and students belonging to ethnic groups or national minorities, seems to be limited. Likewise, the Strategy might lack essential elements to develop students' political analysis of the nature of discrimination and prejudice through the lens of equity. The review team noticed during the school visits that the principle of inclusion is widely understood in schools, and children and young people were aware of this and the ways this is influencing their thinking about differences. Portugal needs to build on this awareness that clearly exists by introducing a new, critical perspective to Citizenship Education and forging an equitable and just society for all students. Portugal has achieved impressive feats in widespread awareness and acceptance of the principles of diversity and inclusion upon which national education policies are based. However, Citizenship Education needs to address more critical multicultural issues. The next phase of development should build on existing good practices in the field for school-wide changes to occur.

Expand continuous professional learning opportunities for teachers to support diversity and inclusion

In Portugal, teachers are required to participate in professional learning at least for 25 hours every year. When looking at content-specific professional learning activities attended by teachers included in TALIS 2018, Portuguese teachers reported lower attendance in comparison to OECD averages in professional learning activities with content relevant for diversity, equity and inclusion. Portugal should consider providing professional learning focused on teaching in multicultural and multilingual classrooms and cultural diversity and inclusion. Resources already exist that can be mobilised to support this, such as the CFAEs and departments of initial teacher education within higher education. Some forms of collaboration between researchers at teacher education departments and the CFAEs could be promoted to design and implement diversity, equity and inclusion-focused courses. This would stimulate powerful synergies and ensure that inclusive education becomes a continuous process of educational transformation. The provision/introduction of expanded professional learning for inclusion will need careful planning, coordination and local leadership. During the visit to Portuguese schools, the review team gathered considerable evidence of staff within schools supporting one another. However, the review team heard no examples of planned school- or cluster-based programmes to promote professional learning.

Introduce a programme of professional learning focused on the promotion of inclusive classroom practices

As it moves forward with its reform agenda, a central challenge for the Portuguese education system will be with the development of inclusive classroom practices in every school. This has significant implications for those involved in leadership roles at the school and local area levels. It means that they will have to stimulate and coordinate professional learning amongst their staff to develop inclusive practices. The

starting point for developing inclusive practices should be with the sharing of existing approaches through collaboration amongst staff, leading to experimentation with new practices that will reach out to all students. This requires an engagement with various kinds of evidence collected by practitioners, sometimes with support from researchers to stimulate joint practice developments. The use of this form of school-based professional learning will require organisational flexibility and the active support of senior staff, who must be prepared to encourage and support processes of experimentation within their schools. It also means that attempts to develop inclusive schools should pay attention to the building of consensus around inclusive values within school communities. This implies that school leaders should be selected in the light of their commitment to inclusion and their capacity to lead in a participatory manner. They will also need professional learning opportunities that will support them in putting this stance into action. This approach to professional learning is radically different from traditional approaches based on attendance at courses and workshops, where participants are largely passive recipients of other people's ideas. Its introduction will therefore need careful planning at the national level and dynamic coordination of its implementation at the local level. It will also be important to involve practitioners as active participants in the process.

Formulate clear guidance on the use of support resources within schools and communities

The new thinking that informs Portuguese educational policy provides those with a background in special education with new opportunities for representing the interests of those students who are marginalised within existing educational arrangements. For this to happen, however, there needs to be greater clarity about the roles of specialist support staff. Within Portugal, there is an impressive range of additional professional and community support available that can be mobilised to support the development of inclusive practices, However, the new thinking emphasised by Portuguese national policy will require significant changes in the thinking and practice in this section of the workforce. Progress towards a more inclusive education system requires a move away from practices based on the traditional perspectives of special education. In particular, it involves a shift away from explanations of educational difficulties that concentrate on the characteristics of individual students and their families, towards an analysis of the contextual barriers to participation and learning experienced by students. With this in mind, the roles of the multidisciplinary teams in each school need refining in order that they can formulate and coordinate inclusive school improvement strategies. At present, the teams work at the level of the cluster, where they seem to be an effective means of ensuring that support is allocated to individual students, as and when necessary. In order to support the development of inclusive classroom practices, however, they will need to involve planning that is much more closely linked to the day-to-day work of teachers. There is also a need to draw on the support of other actors in the wider community who have significant roles in the lives of children and young people. These include parents/caregivers; teacher educators and researchers; national, local and school-level administrators and managers; policy makers and service providers in other sectors (e.g. health, child protection and social services); civic groups in the community; and members of minority groups that are at risk of exclusion. The preoccupation with inclusion means that this also requires a particular concern to giving voice to those who may be powerless or unheard in the decision-making processes.

Ensure that there is a coordinated structure of local support to schools and school clusters in promoting equity and inclusion

External proposals for change - such as the Portuguese reforms - however powerfully enforced, have to be endowed with meaning within local contexts before they can inform practice. Schools may negotiate local meanings for those agendas that are different from those of policy makers and even of other schools. All of this has crucial implications for the way Portugal formulates its next phase of development in relation to equity and inclusion. Put simply, this will need powerful and well-managed strategies for managing change, particularly at the level of local areas. In order to develop a strategy for coordinating developments

at a local area level it will be important to carry out a contextual analysis in order to identity particular challenges that need to be addressed and good practices that can be built on in order to address these difficulties. A particular set of important factors that will require local coordination relate to how local schools engage with one another. There is considerable evidence that school-to-school collaboration can strengthen improvement processes by adding to the range of expertise made available. There is also evidence showing that when groups of schools seek to develop more collaborative ways of working, this can have an impact on how teachers perceive themselves and their work. This has important implications for the future roles of local-level administrators and support staff. They should adjust their ways of working in response to the development of improvement strategies that are led within schools. Specifically, they should monitor and challenge schools in relation to the agreed goals of collaborative activities, while senior staff within schools share responsibility for the overall leadership of improvement efforts. In taking on such roles, local-level staff can position themselves as guardians of improved outcomes for all students and their families - protectors of a collegiate approach but not as managers of day-to-day activities.

Strengthen strategies for monitoring and evaluating inclusive education practices at the local and school levels

The movement towards greater responsibility for promoting equity and inclusion to the school and local levels has important implications for national accountability and inspection systems. Effective systems need to be in place to ensure that local actions are being taken and that they are in line with national requirements. This points to the importance of Portuguese schools being actively involved in forms of self-evaluation, as required by national policy. In this context, research on the benefits of school-to-school cooperation suggests that school evaluation should be carried out by “schools for schools'”, using forms of peer review as a stimulus for improvement. However, this shift must be challenging and credible. In other words, this process needs to be monitored to ensure the sharing and development of good school-level practices in line with national educational priorities. This concern could be addressed by involving school inspectors as moderators of the process.

Long-term policy recommendations

Improve the management of resources for inclusive education and continue efforts to build a coherent funding system to support equity and inclusion

The system for funding inclusive education is being adapted in order to increasingly enable stakeholders at the territorial, local and school levels to design and implement their own inclusive initiatives. This is still a process that should be strengthened. Furthermore, besides the existence of some funding formulae to allocate additional human resources, the current resourcing system is not transparent. The support provided by resource centres for inclusion and special education teachers is primarily connected to the needs of individual students rather than aiming at building the capacities of mainstream teachers and the whole school. In this sense, some current mechanisms may be still inadequate to enable school clusters and teachers to assume responsibility for inclusive educational practices. Therefore, Portugal might consider moving away from a system of connecting extra resources with the needs of individual students to a system of building capacity of teachers and whole schools to respond to extra needs. A related point is that there is a need for greater autonomy at the local and school levels as well as flexibility within school budgets. This would enable a dynamic approach to the identification of learners’ needs and the provision of adequate support measures. However, greater autonomy granted to local authorities and school clusters in terms of funding could lead to greater variation between schools and localities. It is important that it goes hand in hand with strong coordination and accountability measures to ensure an equitable and inclusive education system. This also means that the resourcing system needs to be transparent and carefully designed and monitored, which might currently not be the case in Portugal.

Implement multicultural teacher education to mainstream diversity, equity and inclusion courses

Inclusive education cannot materialise without teachers. Teachers cannot deal with what they do not know. Consequently, efforts at sustaining inclusive education would require a meaningful transformation in how teachers are trained. Without this training and knowledge, most teachers feel unprepared to deal with culturally and linguistically diverse classrooms as international research and data show. Therefore, in the long term, consideration should be given to reforming the ITE curriculum to reflect today's classroom demands and to be working closely with institutions of higher education and other ministries responsible for this area. Initial teacher education and teachers' professional learning in Portugal should undergo significant reforms to train high-quality teachers who are responsive to the diverse needs of students in 21st century Portuguese classrooms and can promote equitable and inclusive settings. In ITE, developing a set of competencies for diversity and inclusion, combined with multicultural teacher education where diversity and inclusion courses will be a requirement for completion of studies, could be implemented. Issues of inclusion, equity and diversity should be made visible and required for ITE to ensure that topics are incorporated into general courses by all teacher educators. In the longer term, the aim should be to develop single courses to prepare all teachers to meet the full range of diverse student needs. Similarly, professional learning opportunities in areas linked to diversity, equity and inclusion should be further promoted.

Improve the recruitment, retention and attractiveness of the teaching profession to strengthen inclusive education

The recruitment, retention and evaluation of teachers have consequences for the stability of the teaching staff in schools. Both stability and expertise within the teaching force have important implications for expertise in schools and their ability to implement and sustain equity and inclusion measures. Newly graduated teachers are particularly prone to abandoning the profession because they are likely to find themselves working in challenging environments, such as educating students from diverse backgrounds without prior training. Moreover, newly graduated teachers willing to integrate the public school network often work under a short-term (one-year) contract, which places them in situations of instability and precarity. Portugal might consider improving the current recruitment system to ensure greater sustainability and commitment in relation to equity and inclusion within the teaching workforce. In moving this ahead, clearly defined criteria and guidelines to identify, attract and retain good quality teachers should be in place to facilitate the appointment of teachers adequately trained to prepare students to face local and global challenges. The central authorities should set the relevant standards for teacher qualifications. Teachers can be hired at lower levels of the education system, such as the municipal level, in accordance with the standards established by central authorities. When teacher recruitment is localised, teachers feel a sense of responsibility towards the community in which they work. This connection to the community can stimulate the desire to work for all students, including diverse students. In addition, these community and school partnerships can contribute to promoting dialogue and a socially cohesive climate, both of which have implications for equity and inclusion in municipalities.

Promote the recruitment of teachers from diverse ethnic, cultural and linguistic backgrounds

Evidence shows that the Portuguese teaching force has a very small number of teachers with an immigrant background. Portugal should consider taking concrete steps to bring diversity within its teacher force to realise the vision of inclusive education as projected by the 2018 legislation. To break the cycle of inequity, the education system should directly address diversity in education. This starts with attracting more ethnically, culturally and linguistically diverse students into teacher education programmes and then retaining them in the teaching profession. Research illustrates the importance of teacher diversity because

of the substantial benefits teachers with diverse backgrounds provide to all students, especially students with diverse backgrounds. Portugal should consider building the capacity of its teaching force by improving its teacher supply pipeline. The caveat would be to attract, support, develop and retain educators of diverse ethnic, gender, cultural and linguistic backgrounds. In the past decades, numerous governments have launched a variety of minority teacher recruitment programmes and initiatives, including future educator programmes in secondary schools, partnerships between institutions of higher education, career ladders for paraprofessionals in schools and alternative teacher certification programmes.

Strengthen the management of system-level monitoring and evaluation of inclusive education

Monitoring and evaluation in Portugal is key for assessing the inclusiveness in the education system. Establishing system-level frameworks to monitor the access, participation and achievement of all learners is fundamental to evaluate the progress of education systems towards reaching inclusion and equity goals and subsequently informing policies in these areas. Portugal is already collecting data based on internationally set education indicators and conducts, to some extent, monitoring and evaluation of some programmes aimed at promoting equity and inclusion in education. Moreover, the country is working on developing new indicators and categories to collect data without labelling students. While it is still early to identify clear recommendations due to the new nature and specificity of the approach Portugal is adopting, the review team already suggests that the country formulates clear guidance and provides support to local and school stakeholders who will have a key role in the process of design and implementation of a new monitoring and evaluation strategy.

More broadly, in its effort to strengthen monitoring and evaluation strategies, Portugal is encouraged to collect information on broader aspects of education quality, such as student attitudes, motivation and well-being and the overall teaching and learning environment in schools. As part of this effort, there should be consideration on how to best include in the national monitoring system the perceptions of stakeholders regarding the teaching and learning environment and, in particular, the ability of the education system to be inclusive. One option for doing this is to administer a national-level questionnaire to a sample of students, parents, school leaders and teachers in the system to collect views and perspectives about a range of aspects, including academic, psychological, physical, social and material well-being. Additionally, Portugal might consider systematically evaluating education programmes targeted at improving equity and inclusion in education. At present, the evaluation of policies and practices is not common in Portugal, where an evaluation culture might be missing so far. There are a number of promising practices in municipalities and schools across Portugal but most have not been evaluated. Evaluating such practices would help to assess whether they are effective and could be scaled up and adopted in other municipalities and schools.

1 An overview of diversity, equity and inclusion in the Portuguese education system

This chapter provides an overview of the main elements of the Portuguese education system in relation to diversity, equity and inclusion. The chapter first depicts the structure of the education system and the organisation of the school offering, highlighting core features for equity and inclusion. It then proceeds to analyse trends in the performance of students in Portugal over the last decade, as well as the challenges faced and improvements made by the Portuguese education system. In conclusion, the chapter analyses the characteristics, outcomes and challenges of some diverse student groups relevant to the Portuguese context, namely students with an immigrant background, Roma students and students with special education needs.

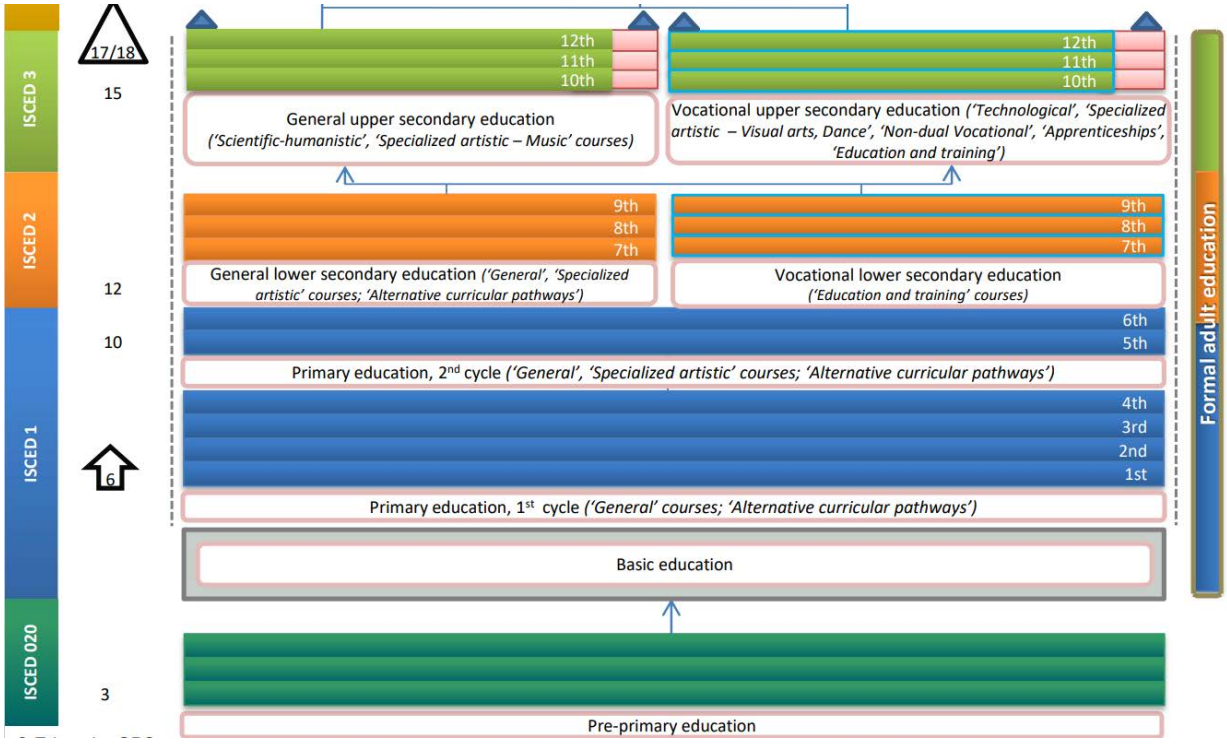
Structure and student enrolment

Since the 1986 Education Act, the Portuguese education system has been organised in three subsequent levels:

1. Pre-primary education (*educação pré-escolar*) - level 02 of the International Standard Classification of Education (ISCED) - for children aged 3 to 6. It is offered in either public, private government-dependent or private independent schools. Private pre-primary schools often offer both early childhood care (children aged 0 to 3) and pre-primary education.
2. Basic education *(ensino básico)* - Compulsory education starts at the age of 6, when children enrol in basic education (ISCED 1-2). Basic compulsory education is organised in three study cycles, with varying lengths. The first cycle – elsewhere called primary education – comprises the first four years of ISCED 1 under the responsibility of a single teacher. The second cycle lasts for two years and is organised in curriculum areas under the responsibility of one teacher per subject/curriculum area (e.g. a natural sciences teacher can also teach mathematics). The third cycle of basic education is comparable to lower secondary education (ISCED 2) and lasts three years.
3. [Upper] Secondary education (*ensino secundário)* - After a common curriculum taught throughout the nine-year basic education, at the end of the third cycle, students (typically aged 15) transition to secondary education, corresponding to ISCED Level 3 (i.e. upper secondary education). It comprises three years of schooling, and students can choose between different education and training offerings, which mainly include four different general courses and 239 vocational courses.

In the context of curricular flexibility, two teachers can cooperate to teach a cross-curricular subject throughout compulsory schooling. Figure 1.1 provides an overview of the Portuguese education system up to ISCED 3, highlighting the different paths that can be undertaken from ISCED 2 (OECD, 2020[1]).

Figure 1.1. Diagram of the pre-tertiary education system (2020)



Note: For further information about the structure and the different paths between grades and programmes, please consult the OECD Education GPS (https://gpseducation.oecd.org/CountryProfile?primaryCountry=PRT).
Source: Adapted from OECD (2020[1]), "Portugal: Overview of the Education System", OECD Education GPS, http://gpseducation.oecd.org/Content/MapOfEducationSystem/PRT/PRT_2011_EN.pdf (accessed on 01 September 2021).

Since the Law No. 25/2009, 27 August[1], formal schooling in Portugal is compulsory for students between 6 and 18-years-old or until the completion of upper secondary education if students complete their studies before the age of 18. The law also guarantees universal pre-school education for children above five years of age. In 2018, at least 90% of the population aged between 4 and 17-years-old was enrolled in education (from pre-primary to upper secondary) in Portugal (see Table 1.1). In 2010, at least 90% of the population aged between 5 and 16-years-old was enrolled in education, meaning that Portugal managed to expand student participation to match the OECD average. The 2020 OECD Education at a Glance Report (OECD, 2020[2]) notes that in ten out of the 23 OECD countries with data available, the age range for enrolment was longer in 2018 than in 2010, and that Portugal recorded one of the largest increases along with Belgium, Korea and Norway. About 100% of the population aged from 6 to 14 years-old and 90% of the population from 15 to 19 years-old was enrolled in education in 2019. This rate significantly drops to 38% for the population from 20 to 24 years-old (OECD, 2021[3]).

Table 1.1. Age range in which at least 90% of the population are enrolled in school, in selected OECD countries (2010 and 2018)

	Highest age (2018)	Lowest age (2018)	Lowest-highest age (2010)	Lowest age (2010)
Norway	18	2	17	3
Belgium	18	3	16	3
Latvia	18	4	18	5
Slovenia	18	4	18	5
Poland	18	5	18	6
Finland	18	6	18	6
Korea	17	2	17	5
Denmark	17	3	16	2
France	17	3	16	3
Spain	17	3	16	3
EU-23 average	17	4	17	4
Netherlands	17	4	17	4
OECD average	17	4	17	4
Portugal	17	4	16	5
Switzerland	17	5	17	5
United States	17	5	16	5
Austria	16	4	16	4
Hungary	16	4	17	4
New Zealand	16	4	16	3
Slovak Republic	16	7	16	6

Note: Countries and economies are ranked in descending order of the highest age at which at least 90% of the population are enrolled.
Source: Adapted from OECD (2020[2]), *Education at a Glance*: *OECD Indicators*, Figure B1.2, p.157, https://doi.org/10.1787/69096873-en.

As mentioned above, upper secondary education offers scientific and humanistic, artistic and vocational pathways. More than half of 15 year-old or older students enrol in scientific or humanities courses (59% in 2019/2020), selecting one of four curricular areas: Sciences and Technologies, Social and Economic Sciences, Languages and Humanities or Visual Arts[2]. While the sciences-humanities strand is geared towards further studies at the tertiary level, other pathways offer vocationally-oriented courses. Professional programmes (*cursos profissionais)*, apprenticeship programmes (*cursos de aprendizagem*), specialised artistic courses (*cursos artísticos especializados*), and education and training courses (*cursos de educação e formação, CEF*) are traditionally geared towards integration in the labour market. They comprise part of the vocational education and training (VET) sector in Portugal, which enrols about 41% of students in secondary education.

Less than 1% of secondary students follow courses with special/specific syllabi in private schools (*cursos com planos própios*). Students enrolled in these courses follow a curriculum that combines sciences-humanities and vocational courses and they obtain a double certification. As a result of recent legislation on exams and certification, students enrolled in some VET courses can more easily prepare for and access higher education. Decree Law No. 11/2020, of 2 April, created special conditions for admission to higher education for students holding dual certification. It recognises the curricular specificities of these secondary qualification pathways, creating their own differentiated access regime, with specific selection and ranking criteria.

Furthermore, a small portion of students (8%) attend basic education under specific programmes other than the regular curricular pathway, suited to their profiles. These include basic level specialised artistic courses, CEF courses, education and training integrated programmes (*programas integrados de educação e formação*, PIEF), alternative curricular pathways (*precursos curriculares alternativos*) and pre-vocational courses, adapted to struggling students' specific needs and interests.

Table 1.2 provides an overview of student distribution by type of educational offer. This table, as well as the other tables and figures in this report, focus exclusively on Portugal Mainland and do not include data from the insular territory of the Country, also known as Autonomous Regions of Portugal (*Regiões Autónomas de Portugal*), specifically the Azores (*Região Autónoma dos Açores*) and Madeira (*Região Autónoma da Madeira*).

Table 1.2. Enrolled students in basic and secondary education by typology of programme, Portugal Mainland (2019/2020)

Type of offer/level of education	1st cycle basic education	2nd cycle basic education	3rd cycle basic education	Secondary education	Total
General courses	364 648	198 524	302 523	x	865 695
From which in Sciences-Humanities courses	x	x	x	196 278	196 278
From which in Courses with Personalised Plans	x	x	x	3 457	3 457
Education and training integrated Programme (PIEF)	35	589	1 578	x	2 202
Specialised artistic courses	x	1 283	1 568	2 740	5 591
Alternative pathways (PCA)	x	245	979	x	1 224
Education and training courses (CEF)	x	x	10 574	28	10 602
Professional courses	x	x	358	110 549	110 907
Apprenticeship courses	x	x	x	19 456	19 456
Total enrolment of young students	364 683	200 641	317 580	332 508	1 215 412
Adult learning courses	1 484	3 781	12 733	40 632	58 630
Total enrolment	366 167	204 422	330 313	373 140	1 274 042

Note: "x" values indicate missing enrolment data, generally due to an impossibility to select some programmes at certain education levels. Enrolment in adult learning courses include individuals in recurrent classes (*ensino recorrente*), education and training courses for adults (*Educação e Formação de Adultos, EFA*), certified modular training (*Formações Modulares Certificadas,* FMC) and in the national system of prior learning assessment and recognition (*Sistema Nacional de Reconhecimento, Validação e Certificação de Competências*, RVCC).
Source: Adapted from DGEEC (2021[4]),https://www.dgeec.mec.pt/np4/96/%7B$clientServletPath%7D/?newsId=145&fileName=DGEEC_DSEE_2021_EE20192020.pdf (accessed on 19 August 2021).

In Portugal, basic and secondary education also provide a wide array of courses for adult qualification and potential early school leavers. Second-chance educational programmes for adults generally aim at providing individuals with relevant qualifications for the labour market. The certification of skills acquired outside of the formal education system fall under the umbrella of the *Qualifica* Programme. The Programme's main objective is to improve the levels of education and training of adults, contributing to improving the qualification levels of the population and employability. The Programme involves a wide network of operators, including the *Qualifica* Centres (*Centros Qualifica*) that assume a central role as specialised centres in adult qualification (Ministry of Education, 2022[5]).

To complete general secondary education, students in Portugal must take national examinations. National examinations are standardised tests undertaken by every student during the relevant school year. The students take the examinations in the subjects corresponding to their strand of studies, typically completing two in 11th grade and another two in 12th grade (end of upper secondary). Examinations are a formal requirement for graduation from secondary education and the students' results may be used to grant admission to tertiary education. Factors that are considered to place tertiary education student candidates are slot availability, student demand and student candidacy grade. Student placement is managed centrally by the government. The candidacy grade depends on the final graduation grade and scores in the final examinations. Final graduation grades in each subject are computed as the weighted average of the school grade and the grade at the national exam for that subject (with weights of 70% and 30%, respectively). The quantitative candidacy grade is then assigned a weight by the tertiary educational institution and the

department to which the student applies. The candidacy grade must weigh a minimum of 50% in the admission decision. Each tertiary education institution can set the weight of the national examination scores within a band of 35% to 50% of the total score for admission (Liebowitz et al., 2018[6]).

In addition to upper secondary examinations, there are national examinations in Portuguese and mathematics at the end of basic education (9th grade). National low-stakes assessments in basic education (*provas de aferição*) are also carried out in the middle of each education cycle (2nd, 5th and 8th grades). In contrast to earlier student assessment methods that focused on measuring the individual performance of students and schools, these tests are mainly used for an overall assessment of the education system. They are also provided to teachers to inform them of the achievement of their students. Reports provided to families are qualitative in nature, describing students' skills without reporting a score to students or families, though scores are computed and averaged at the school level. Central level authorities then analyse school-level scores to generate a report on the ability of each school to provide quality education (Liebowitz et al., 2018[6]).

Organisation of the school offer

The school offer in Portugal is guaranteed by both public and private providers. Public schools are grouped into clusters, although 2% remain ungrouped. Each cluster consists of multiple education levels and shares one leadership team. The school leader leads each team with coordinators and deputy principals assisting the administration of the school cluster. Cluster sizes vary, ranging from two to 28 schools, but usually consist of four to seven schools. In 2020 in Portugal, the public school network was made of 5 378 schools; 5 283 of them were grouped in 713 school clusters, the remaining 95 schools being non-clustered schools. Clusters were introduced in 2005 as part of measures to consolidate schools, with the rationale of increasing the efficiency and capacity for pedagogy, for transitions between education levels and communication between leadership and schools.

About 80% of students in Portugal attend public schools (Table 1.3). However, the rates are much higher for primary and secondary schools than pre-primary schools. For example, 91% of children aged 0 to 3 attend pre-primary schools, but fewer than half of these students attend a public school (OECD, 2020[2]). During the 2019/2020 school year, 87% of primary students and 78% of secondary students were enrolled in the public school system. In contrast, nearly 53% of 3 to 5-year-olds attended a public pre-primary school, which remains significantly higher than the OECD average of 33% (*Ibid.*). Table 1.3 provides an overview of the number of students enrolled in education from ISCED 0 to ISCED 3 during the 2019/2020 school year. In Table 1.2 each school is counted as many times as the education levels it teaches. Many preschools also provide early childhood education and care for children aged 0-3 as part of programmes run by the Ministry of Labour, Solidarity and Social Security. Primary and secondary education is mainly the remit of the Ministry of Education (MoE), although Portugal has started a decentralisation process giving more responsibilities to municipalities, in particular in primary education (see Chapter 2).

Table 1.3. Number of students enrolled by level of education and type of institution, Portugal Mainland (2019/2020)

Education level			Number of students	Number of educational institutions	Distribution of students across level (%)	Students attending public schools (%)	Students attending government-dependant private schools (%)	Students attending independant private schools (%)
All	ISCED 0-3		1 512 660	12 757	100	79.7	6.3	14
Pre-primary	ISCED 0		238 618	5 487	15.7	52.7	29.2	18.1
Basic	ISCED 1-2	total	900 902	6 373	59.6	87.4	2.1	10.5
	ISCED 1	1st cycle	366 167	3 875	24.2	86.8	1.2	12.1
		2nd cycle	204 422	1 111	13.5	88.1	2.6	9.3
	ISCED 2	3rd cycle	330 313	1 387	21.9	87.8	2.7	9.5
Secondary	ISCED 3		373 140	903	24.7	78.3	1.8	19.9

Note: The same school may teach more than one level of education.
Source: Adapted from Directorate-General for Education and Science Statistics (DGEEC) (2021[4]), Education Statistics 2019/2020, https://www.dgeec.mec.pt/np4/96/%7B$clientServletPath%7D/?newsId=145&fileName=DGEEC_DSEE_2021_EE20192020.pdf (accessed on 19 August 2021).

Guidelines for enrolment of students in public primary schools are based on several factors. In general, students' enrolment in a school depends on their legal address, meaning that students most often go to the school that is the nearest to their home. In some cases, parents can ask to enrol their child in another school, upon one or several of the conditions listed below. In an individual school, there can be a shortage of places available relative to the number of potential students. When this occurs, places are given based on the following criteria (in order of priority):

- being identified with special education needs that can be met at that school
- being enrolled in that school the previous year
- having siblings enrolled in the school
- the student's legal address, as confirmed by tax documents to prevent fraud
- the parents/guardians' work address
- students receiving social support.

Using social support as a criterion for school placement was introduced in 2018. This measure is meant to increase socio-economic diversity in schools and provide more opportunities for students from a low socio-economic background (Liebowitz et al., 2018[6]).

In contrast, since private schools have autonomy in many areas, enrolment guidelines in private schools are not regulated or consistent. They are autonomous in setting their enrolment criteria, recruiting their staff and establishing more general quality standards for teachers and students. They may also independently determine their own selection criteria as long as anti-discriminatory laws are not violated. Private schools may be self-financed through tuition fees paid by students' families, while others rely on government financing. The private government-funded schools are usually meant to increase the availability of places in rural areas where public schools may be lacking, welcome more students with special education needs or provide focused creative subjects. All private schools, both non-profit and for-

profit, are regulated by laws and must follow national education orientations and curriculum documents. Furthermore, the Ministry of Labour, Solidarity and Social Security works with the MoE to oversee non-profit organisations that run early childhood education and care. Autonomous enrolment and selection criteria are particularly relevant in early childhood education and care, as over half of students aged 3-5 attend private schools (OECD, 2020[2]).

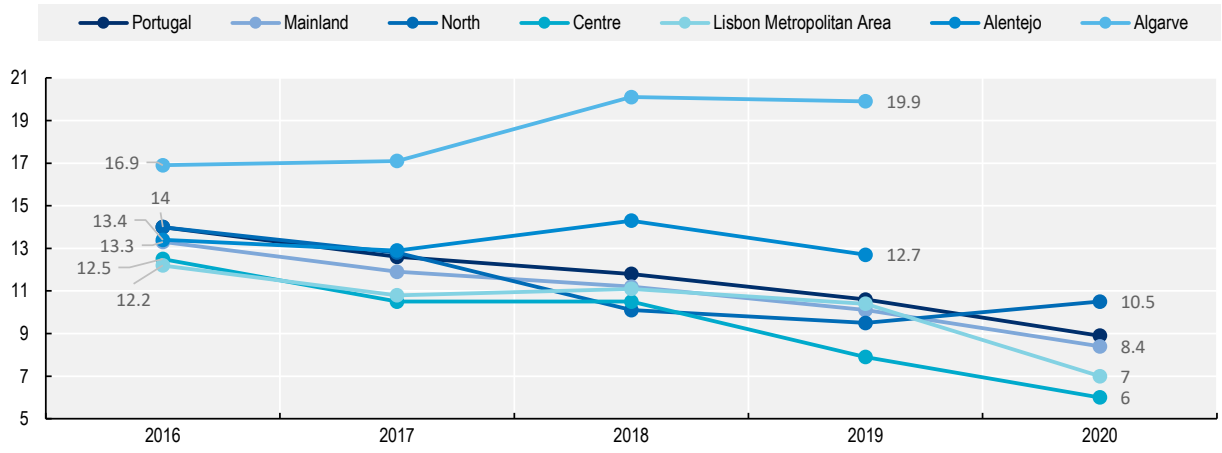
Outcomes of the education system

One of the challenges facing education systems in many countries, as in Portugal, is students disengaging and consequently dropping out of the education system, meaning that they leave school without an upper secondary qualification. These young people tend to face severe difficulties entering – and remaining in – the labour market. Leaving school early is a problem for both individuals and society. Graduating with excessive delays is another source of concern, raising the issue of a later entry into the labour market and hence delaying the time when they are typically able to start contributing financially to society (OECD, 2020[7]).

Early school leaving

Over the last few years, Portugal has made significant improvements with regard to early school leaving. Following the positive trend in the last ten years, the rate of early leavers[3] from education and training keeps decreasing. It stood at 8.9% in 2021 (8.4% in Portugal Mainland), lower than in 2019 (10.6%) and slightly below the European Union (EU) average of 9.9% (DGEEC, 2021[8]). Nonetheless, rates vary significantly across regions (Figure 1.2). In 2019, the Algarve had the highest rate of early school leavers (19.9%) in the continental territory of Portugal and was the only region where the rate of early school leavers is higher than in 2016 (16.9%). Alentejo comes second with 12.7% of early leavers the same year, followed by the Metropolitan Area of Lisbon (10.4%), the North (9.5%) and the Centre (7.9%).

Figure 1.2. Rate of early leavers (aged 18-24-years-old.) from education, by region (2016-2020)



Note: Early leaver from education and training, previously named early school leaver, refers to a person aged 18 to 24 who has completed at most lower secondary education and is not involved in further education or training; the indicator "early leavers from education and training" is expressed as a percentage of the people aged 18 to 24 with such criteria out of the total population aged 18 to 24.
Source: National Institute of Statistics (INE) (2021[9]), *Taxa de abandono precoce de educação e formação* [Early leaving in education and training]https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_indicadores&userLoadSave=Load&userTableOrder=10850&tipoSeleccao=0&contexto=pq&selTab=tab1&submitLoad=true (accessed on 02 November 2021).

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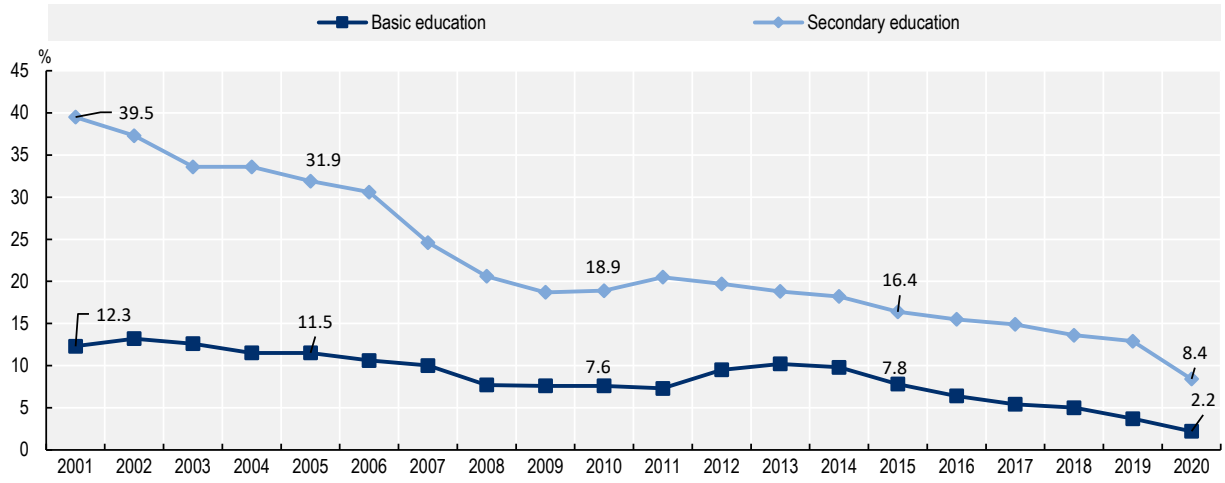
Portugal has also shown advancements in other areas related to the progression of students in schools. The student grade repetition and dropout rate[4], which indicates the percentage of students who, at the end of a given school year, did not progress to the next school level, decreased considerably over the past two decades, both in primary and secondary education (See Figure 1.3). Between 2005 and 2020, this rate decreased by more than five times in basic education and by 3.8% in secondary. In 2020, the grade repetition and dropout rate reached 2.2% in basic education and 8.4% in secondary. In other words, 97.8% of students enrolled in basic education and 91.6% of students enrolled in secondary education continued to the next grade.

Figure 1.3. Rate of grade repetition and dropout for basic and secondary education (%), Portugal Mainland (2001-2020)



Source: DGEEC (2020[10]), Transition/attainment rates and retention/dropout rates – Mainland, https://www.dgeec.mec.pt/np4/96/ (accessed on 18 August 2021).

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Nonetheless, there are significant regional variations also in this area. The Directorate-General for Education and Science Statistics (D*ireção-Geral de Estatísticas da Educação e Ciência*, DGEEC) (2020[11]) estimates that at the end of the 2019/2020 school year, the grade repetition and dropout rate in basic education was 2.2%, with the highest value at the end of the 3rd cycle (3%) compared to the 2nd cycle (2.4%) and to the 1st cycle (1.4%). For all cycles, rates were the highest in Alentejo (3.3%), followed by the Algarve (3.2%), Lisbon Metropolitan Area (3.1%), the Centre (1.7%) and the North (1.2%). The same pattern as in basic education is found in secondary, where the grade repetition and dropout rate reached 8% in sciences-humanities courses and 8.9% in professional courses in 2019/2020. The highest rate was in Lisbon (11.1% and 11.4%), followed by the Algarve (9.9% and 13.5%) and Alentejo (8.2% and 7.8%). For all cycles, rates were the highest in Alentejo (3.3%), followed by the Algarve (3.2%), Lisbon Metropolitan Area (3.1%), the Centre (1.7%) and the North (1.2%). The same pattern as in basic education is found in secondary, where the grade repetition and dropout rate reached 8% in sciences-humanities courses and 8.9% technologic and professional paths in 2019/2020. The highest rate was in Lisbon Metropolitan Area (11.1% and 11.4%), followed by the Algarve (9.9% and 13.5%) and Alentejo (8.2% and 7.8%).

Furthermore, substantial differences exist between public and private schools. During the 2018/2019 school year, grade repetition and dropout rates varied between 0.5% and 1% across the different regions in private basic schools (with the exception of the Centre, at 1.8%) and between 2.6% and 5.9% in public basic schools. In private secondary schools, they varied between 6.7% and 10.3% in private schools, while in public secondary schools they ranged between 11.8% and 18%.

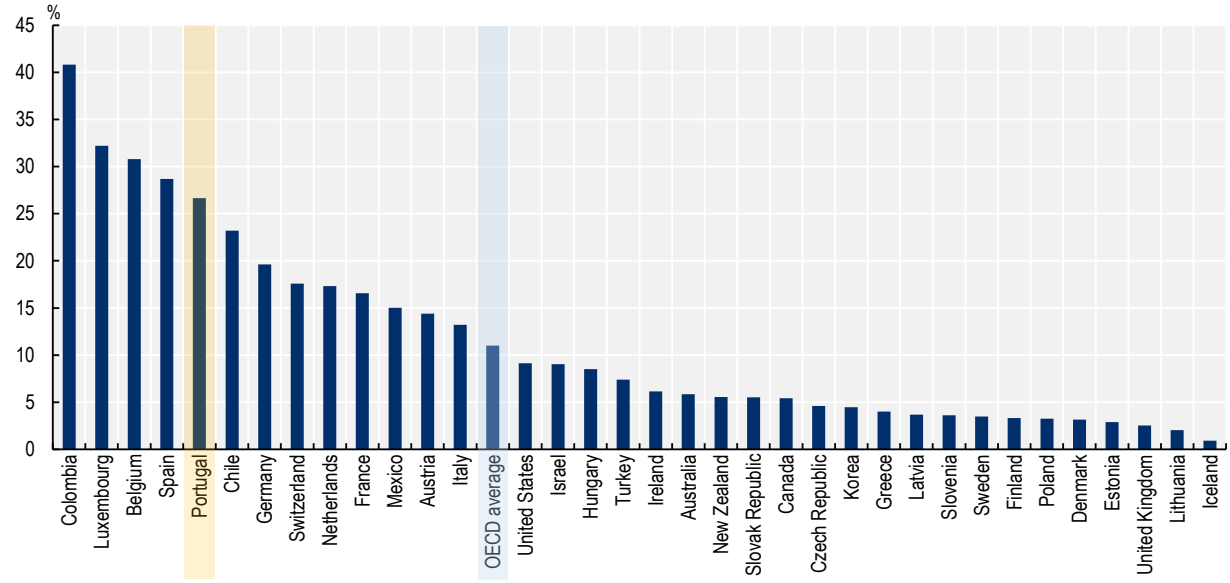
Grade repetition

Available studies also show improvements in the area of grade repetition. For example, grade repetition rates decreased in all grades of basic education between 2014 and 2018 (Verdasca and al., 2019[12]). On average, in primary schools that implemented a Strategic Action Plan (*Plano de Ação Estratégica* - PEA) as part of the National Programme for the Promotion of School Success (P*rograma Nacional de Promoção*

do Sucesso Escolar, PNPSE, see Chapter 2), the grade repetition rate overall decreased by 29% between 2014 and 2018 (Verdasca and al., 2019[12]). Nonetheless, grade repetition is a major concern in Portugal. During the 2017/2018 school year, a significant number of students from the second grade (7%) of primary education repeated a grade. Slightly fewer students did so in fifth grade (6%), while only 2% repeated fourth grade (European Commission, 2019[13]). The rate of students who repeat a grade significantly increases when taking into account primary and secondary education. The OECD Programme for International Student Assessment (PISA) 2018 shows that 26.6% of students in Portugal reported having repeated a grade at least once in either primary or secondary education, which places the country considerably above the OECD average of 11% (Figure 1.4).

Figure 1.4. Grade repetition in OECD countries (PISA 2018)

15-year-old students who reported that they had repeated a grade at least once in primary, lower secondary or upper secondary school (%)



Note: Data for Japan and Norway is missing for this indicator.
Source: OECD (2020[14]), *PISA 2018 Results (Volume V): Effective Policies, Successful Schools*, Figure V.2.5, https://doi.org/10.1787/ca768d40-en.

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In its most recent report, the National Council of Education (*Conselho Nacional da Educação, CNE*) noted that because of high grade repetition rates, a growing number of students are older than the expected school age at each level. Students tend to accumulate multiple repetitions (CNE, 2019[15]). Data from PISA 2018 also show that Portugal has one of the highest shares of students in a grade below the modal grade (31.8%) among OECD countries. There is limited evidence on the long-term impact of grade repetition, but students who have repeated a grade, besides tending to have lower academic outcomes, are more likely to have negative attitudes toward schools and leave school early (OECD, 2020[14]).

Student well-being

Student well-being refers to the psychological, cognitive, material, social and physical functioning and capabilities that students need to live a happy and fulfilling life (OECD, 2017[16]). Well-being is intimately

linked to students' individual abilities, such as social and emotional skills (see Box 1.1), and academic success. Key indicators of student well-being included in PISA 2018 are students' sense of belonging, life satisfaction, self-efficacy and growth mindset. Overall, Portugal tends to score above the OECD average for most measures of well-being in PISA 2018. However, there is variation between student groups, in particular between girls and boys and advantaged and disadvantaged students.

Box 1.1. Survey on Social and Emotional Skills in Sintra, Portugal

Importance of social and emotional skills

To promote student well-being, developing social and emotional skills is key. They can be defined as "a subset of an individual's abilities, attributes and characteristics important for individual success and social functioning" (OECD, 2021, p. 9[17]). Social and emotional skills are essential for many reasons, including cognitive development, academic outcomes, mental health, well-being and labour market preparedness. In addition, they shape behaviours and attitudes that influence life-long outcomes. As a result, various countries, such as Portugal, have increasingly focused on developing these skills by formally integrating them into the curriculum or informally promoting them in the classroom.

Sintra's initiatives to promote social and emotional skills

The municipality of Sintra has promoted social and emotional skills through local community-based activities. One such measure, School Theatre Exhibitions, is regularly organised to encourage skills such as cooperation, creativity, emotional control, tolerance, trust and stress resistance. Sintra also offers primary and lower secondary students the opportunity to participate in Orchestra Projects that support cooperation, collaborative learning, responsibility, achievement motivation, self-efficacy and persistence. In addition to strengthening the holistic development of students, the Orchestra Projects also promote relationships between schools and the community that can support social inclusion through culture and arts.

The Survey

The OECD recently published results from the Survey on Social and Emotional Skills (SSES). The most extensive international survey ever conducted on the topic asked students, parents, teachers and school leaders about students' social and emotional skills. Data was gathered from 10-year-old and 15-year-old students in 2019 from ten different cities, including Sintra, Portugal.

The 17 indicators used to measure social and emotional skills fall under the five categories of open-mindedness, task performance, engaging with others, collaboration and emotional regulation. In particular, the survey aimed to look at how social and emotional skills might vary dependent on factors including gender, socio-economic status and age. The survey also evaluated the relationships between social and emotional skills and academic and well-being outcomes. Unfortunately, the response rate for Sintra did not meet the technical requirement of the study to make reliable comparisons to other cities. However, the results can still shed some light on areas of interest.

Among other elements, the results showed that students from higher socio-economic backgrounds had better social and emotional skills than students from lower socio-economic backgrounds in Sintra. While the results do not explain the relationship's cause, it is worth noting that every student has diverse and individual needs and experiences. The study also finds a strong relationship between students' psychological well-being and social and emotional skills, holding gender and socio-economic status constant. While psychological well-being and life satisfaction decreased from age 10 to age 15, the drop is more prominent for girls than boys. Furthermore, life satisfaction was lower for 10-year-old students with an immigrant background than other 10-year-olds in Sintra.

The survey also examined social relations by asking students about bullying. When compared to girls, boys reported experiencing more bullying than girls, a nine-percentage point difference for 10-year-olds. This supports earlier studies that show boys are more likely to have physical conflicts with other students. However, reports of bullying decreased significantly from 10 to 15-year-old students. Additionally, the gender gap in bullying disappeared for 15-year-olds.

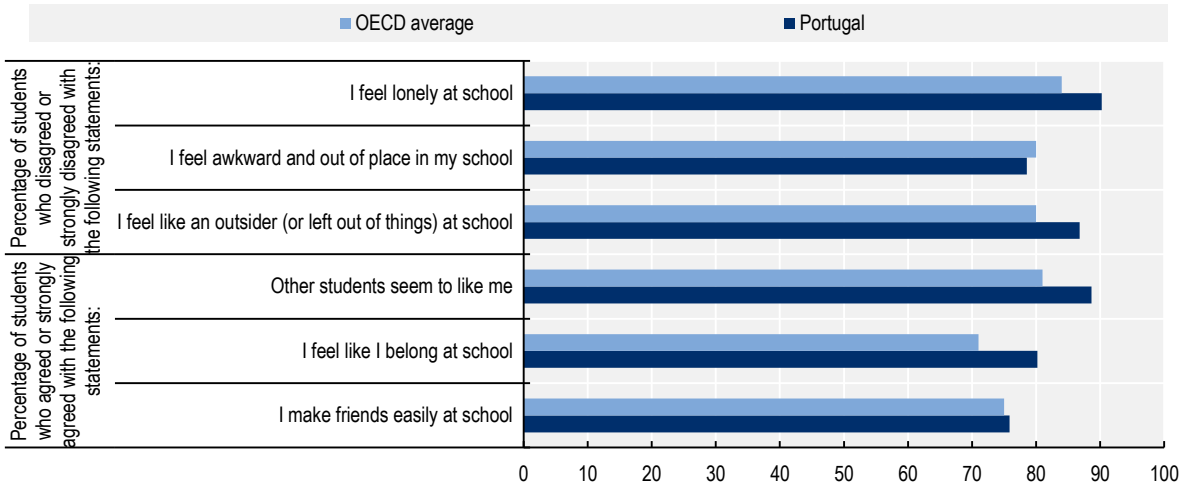
More broadly, the survey results show variations in social and emotional skills according to students' backgrounds and personal characteristics. This information can help target students who may need additional support. Thus, continued data collection using the SSES indicators can help guide future educational policies in Sintra and Portugal.

Source: OECD (2021[17]), *Beyond Academic Learning: First Results from the Survey of Social and Emotional Skills*, https://dx.doi.org/10.1787/92a11084-en.

PISA 2018 asked students whether they agree - on a scale from "strongly disagree" to "strongly agree" - with different statements about their school. In Portugal, students reported over the OECD average for most of these statements (see Figure 1.5). In particular, Portugal was above the OECD average with respect to the percentage of students who agreed that they make friends easily at school (76% vs. 75% on average across the OECD), that they feel like they belong at school (80% vs. 71%); and other students seem to like them (89% vs. 81%). Portugal was also above the OECD average in terms of students who disagreed with the statements related to feeling like outsiders (87% vs. 80%) and feeling lonely at school (90% vs. 84%). The country was slightly below the OECD average in terms of students who disagreed with the following: "I feel awkward and out of place in my school" (79% vs. 80%). However, there was a positive difference in the reported sense of belonging between students from advantaged and disadvantaged socio-economic backgrounds. This means that students from advantaged socio-economic backgrounds felt a higher sense of belonging than students from disadvantaged socio-economic backgrounds.

Figure 1.5. Portuguese students' well-being at school, compared to the OECD average

Percentage of students included in PISA 2018 who reported to agree/strongly agree and disagree/strongly disagree with the following statements



Source: Adapted from OECD (2019[18]), *PISA 2018 Results (Volume III): What School Life Means for Students' Lives*, https://dx.doi.org/10.1787/acd78851-en.

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Another relevant measure of students' well-being is life satisfaction, which is widely used as a summary indicator of well-being in many countries (OECD, 2019[18]). In PISA 2018, Portugal was in line with the OECD average in terms of life satisfaction reported by 15-year-old students. However, when looking at life satisfaction reported by Portuguese students with different personal characteristics, there were a significant differences between advantaged and disadvantaged students and between girls and boys. Advantaged students and boys were more likely to report being satisfied with life compared to, respectively, disadvantaged students and girls. The difference in reported life satisfaction between students with an immigrant background and native students in Portugal was not significant.

Self-efficacy is also another important indicator of student well-being as it refers to the extent to which individual students believe in their own capability to carry out specific activities and tasks, particularly when they are under pressure or face challenges (OECD, 2019[18]). In PISA 2018, students were asked whether they agreed or disagreed with different statements, and in Portugal, the percentage of 15-year-olds reporting to have self-efficacy was higher than the OECD average for almost all statements. In particular, in Portugal, 91% of students included in PISA 2018 agreed with the statement, "I usually manage one way or another" compared to 89% of students on average across OECD countries; 92% of Portuguese students agreed with the statement, "I feel proud that I have accomplished things" compared to an OECD average of 86%. In Portugal, 86% of students also agreed with the statement, "When I'm in a difficult situation, I can usually find my way out of it" compared to an OECD average of 84%; 73% of students in Portugal felt they could handle many things at a time compared to 70% of students on average across OECD countries. Only 67% of students in Portugal agreed that their belief in themselves got them through hard times compared to 71% on average across OECD countries. However, in Portugal, girls were less likely than boys to report self-efficacy and advantaged students were more likely than disadvantaged students (*Ibid.*).

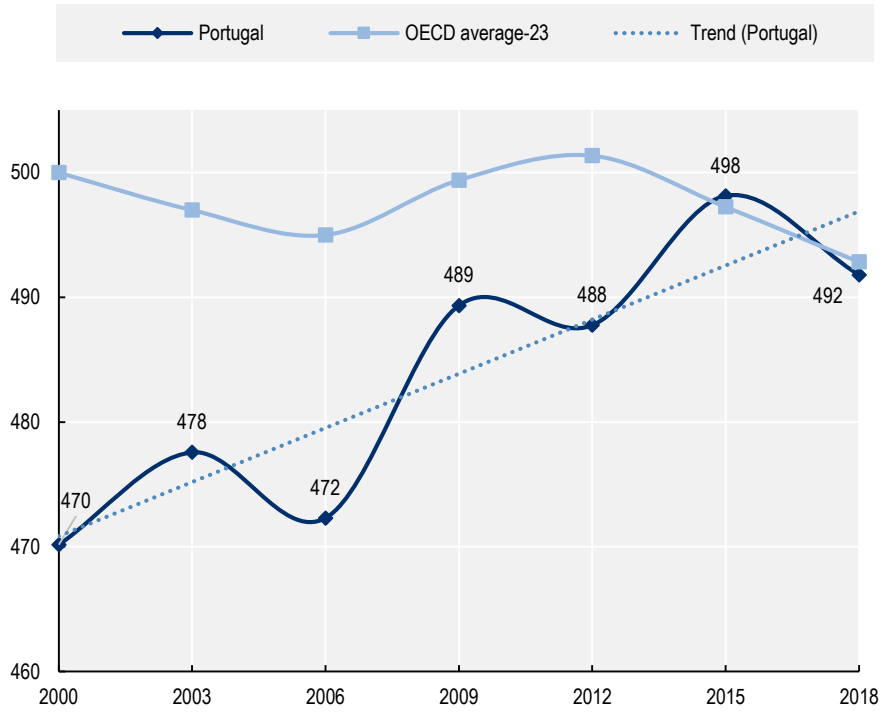
Having a growth mindset is also another important indicator of well-being as it refers to the beliefs that ability and intelligence can develop over time (Dweck, 2016[19]). A growth mindset enables students to develop positive self-beliefs and expectations that they can accomplish their objectives (Dweck, 2016[19];

OECD, 2019[18]). In PISA 2018, the percentage of students in Portugal having a growth mindset was above the OECD average. However, within the country, there were differences between girls and boys and advantaged and disadvantaged students in terms of the percentage of students with a growth mindset (OECD, 2019[18]). Girls and advantaged students were more likely to report having a growth mindset than respectively boys and disadvantaged students.

Student performance

Portugal has shown good academic outcomes in international comparisons, which have been improving over the years. Data from PISA 2018 show that 15-year-old students in Portugal performed around or above the OECD average in 2018, and, assessing over a longer period of time, Portugal appears as one of the few countries with a positive trajectory of improvement in all subjects, reading, mathematics and science. Among the 79 countries and economies that participated in PISA 2018, only seven had similar improvements, and no other OECD member countries. Portugal and Estonia are the only participating countries that have shown a continuous improvement in students' reading proficiency (OECD, 2019[20]). However, the performance slightly decreased in science in PISA 2018 compared to PISA 2015, and returned close to the level observed in 2009 and 2012. As Figure 1.6 shows, in reading, the main subject of PISA 2018, students in Portugal scored only slightly below the OECD-23 average (OECD, 2019[20]). Girls performed better than boys with a statistically significant difference of 24 points (compared to an OECD average of 30 points higher for girls). On average, 15-year-olds scored 492 points in mathematics compared to an average of 489 points in OECD countries. In mathematics, boys performed better than girls with a statistically significant difference of nine points, while the OECD average was a five point differential for boys (OECD, 2019[20]). The Portuguese average performance in science of 15-year-olds was 492 points, nine points lower than PISA 2015, but still three points higher than the OECD average (see Figure 1.8).

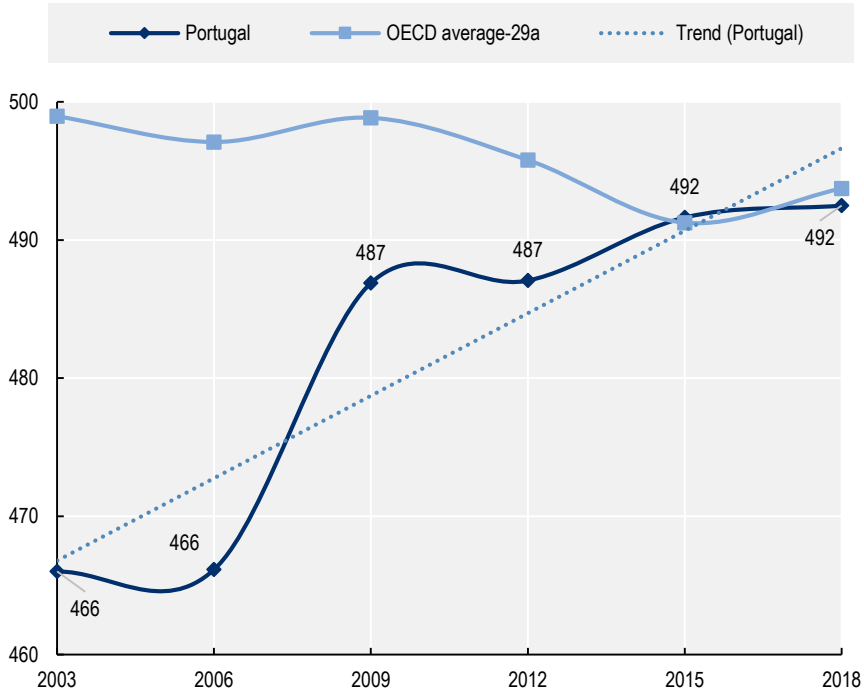
Figure 1.6. Trends in performance in reading (PISA 2000-PISA 2018)



Notes: PISA 2018 Data for Portugal did not meet the PISA technical standards but were accepted as largely comparable.
OECD average-23: Arithmetic mean across all OECD Member countries, excluding Austria, Chile, Colombia, Estonia, Israel, Lithuania, Luxembourg, the Netherlands, the Slovak Republic, Slovenia, Spain, Turkey, the United Kingdom and the United States.
The dark blue line indicates the average mean performance in Portugal and the light blue line the average mean performance across OECD countries with valid data in all PISA assessments. The dotted line represents a trend line for Portugal (linear).
Source: OECD (2019[20]), *PISA 2018 Results (Volume I): What Students Know and Can Do*, Table I.B1.10, https://doi.org/10.1787/5f07c754-en

StatLink https://stat.link/sumb1g

Figure 1.7. Trends in performance in mathematics (PISA 2003-PISA 2018)



Notes: PISA 2018 Data for Portugal did not meet the PISA technical standards but were accepted as largely comparable.
The dark blue line indicates the average mean performance in Portugal and the light blue line the average mean performance across OECD countries with valid data in all PISA assessments. The dotted line represents a trend line for Portugal (linear).
OECD average-29a: Arithmetic mean across all OECD Member countries, excluding Austria, Chile, Colombia, Estonia, Israel, Lithuania, Slovenia and the United Kingdom.
Source: OECD (2019[20]), *PISA 2018 Results (Volume I): What Students Know and Can Do*, Tables I.B1.11, https://doi.org/10.1787/5f07c754-en.

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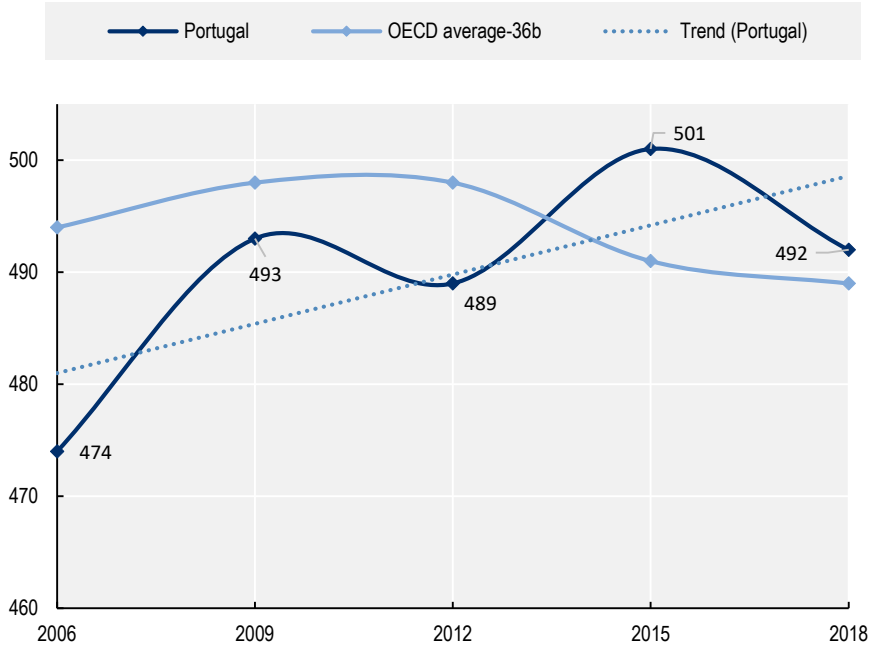
Figure 1.8. Trends in performance in science (PISA 2006-PISA 2018)



Notes: PISA 2018 Data for Portugal did not meet the PISA technical standards but were accepted as largely comparable.
The dark blue line indicates the average mean performance in Portugal and the light blue line the average mean performance across OECD countries with valid data in all PISA assessments. The dotted line represents a trend line for Portugal (linear).
OECD average-36b: Arithmetic mean across all OECD Member countries (and Colombia), excluding Austria.
Source: OECD (2019[20]), *PISA 2018 Results (Volume I): What Students Know and Can Do*, Tables I.B1.12, https://doi.org/10.1787/5f07c754-en.

StatLink https://stat.link/4nizbr

Furthermore, when comparing reading scores between PISA 2006 and PISA 2018 in Portugal, the share of low-achieving students (scoring below Level 2) did not significantly change and the share of top-performing students (scoring at Level 5 or 6) increased. During the same period, the share of low-achieving students decreased and the share of top-performing students increased in science, while in mathematics neither changed significantly (OECD, 2019[20]).

Diversity, equity and inclusion in education in Portugal

While there have been considerable improvements in academic performance and early school leaving on average across the student population, students' backgrounds and personal characteristics still have a significant impact on their educational outcomes in Portugal. Dimensions such as socio-economic background and immigrant background are strong predictors of student performance.

This section of the chapter discusses more in detail the composition and outcomes of diverse student groups in Portugal. While there are many dimensions of diversity that can have an impact on student outcomes in Portugal, this section highlights in particular students with an immigrant background, students with special education needs (SEN) and students from Roma communities as these groups are at the core of the analysis of the review. It also considers the effects of socio-economic status and geographical

location and how different dimensions can interact to create specific challenges to individual students or student groups (see Annex A).

Students with an immigrant background

Immigration in Portugal started in the 1970s, mainly with the arrival of people from Portuguese-speaking African countries. It intensified during the 1990s, when an increasing number of people from Brazil, Eastern Europe and, to a lesser extent, Asia, started to migrate to Portugal, turning the country into an important destination for migrant workers involved in formal and informal networks. As a result, today there are people with an immigrant background from many different origins (de Almeida et al., 2021[21]). While the number of people with an immigrant background significantly decreased between 2004 and 2014,[5] there has been a steady increase in the share of the foreign population residing in Portugal (*população estrangeira residente em Portugal*) since 2015.

Prevalence and distribution of immigrants/foreigners across Portugal

According to the Foreigners and Borders Service (*Serviço de Estrangeiros e Fronteiras*, SEF),[6] there were 388 731 foreigners[7] living in Portugal in 2015 (3.8% of the total population), 421 711 in 2017 (4.1%), 590 348 in 2019 (5.7%) and 662 095 in 2020 (6.4%) (Oliveira, 2021[22]). According to the Portuguese High Commissioner for Migration (*Alto Comissariado para as Migrações*, ACM), the foreign population is not evenly distributed across the country (see Table 1.4). Concentrations are higher in locations with more job opportunities and already established social networks, mainly resulting from the first waves of immigration (Oliveira, 2021[22]). The rate of foreign people is the highest in the district of Lisbon, where 43.1% of all foreign people lived in 2020. The districts of Faro and Setúbal follow Lisbon with respectively 15.6% and 9.2% of the total foreign population. Furthermore, the share of the foreign population has been increasing in nearly all the Portuguese districts between 2019 and 2020, except for Bragança (-3.0%), and in all of them in 2018-2019. The highest increases have been in Castelo Branco (+36.4% between 2018 and 2019 and +14.1% in 2019-2020), Porto (+29.9% in 2018-2019 and +18.6% in 2019-2020), Braga (+29.4% and +15.8%), Setúbal (+29.3% and +17.2%) and Viana do Castelo (+ 29.2% and +28.8%).

Table 1.4. Foreign population residing in Portugal by district (2019 and 2020)

Districts	Number of foreigners residing in Portugal 2019	Number of foreigners residing in Portugal in 2020	% among the total foreign resident population 2020	Variation 2019-2020 (%)
Lisbon	260 503	285 570	43.1	+9.6
Faro	92 603	103 565	15.6	+11.8
Setúbal	51 983	60 939	9.2	+17.2
Porto	42 353	50 238	7.6	+18.6
Leiria	21 436	24 788	3.7	15.6
Braga	18 238	21 113	3.2	+15.8
Aveiro	16 531	18 517	2.8	+12.0
Coimbra	15 530	17 028	2.6	+9.6
Santarém	14 175	16 378	2.5	+15.5
Beja	12 175	14 095	2.1	+15.8
Castelo Branco	5 888	6 717	1.0	14.1
Viseu	5 491	6 503	1.0	+18.4
Viana do Castelo	4 789	6 167	1.0	+28.8
Évora	4 505	4 802	0.7	+6.6
Bragança	5 159	4 036	0.6	-3.0
Vila Real	2 573	2 731	0.4	+8.8
Portalegre	2 532	2 756	0.4	+6.1
Guarda	2 399	2 607	0.4	+8.7

Sources: Adapted from Oliveira, C. R. (2021[22]), *Indicadores de integração de imigrantes: relatório estatístico annual 2021 [Immigrant integration indicators: 2021 annual statistics report]*, ACM, Lisbon, Table 3.1., p.47, https://www.om.acm.gov.pt/documents/58428/383402/Relat%C3%B3rio+Estat%C3%ADstico+Anual+2021.pdf/e4dd5643-f282-4cc8-8be1-92aa499bb92f (accessed on 18 January 2022); and Oliveira, C. R. (Oliveira, 2020[23]) *Indicadores de integração de imigrantes: relatório estatístico annual 2021 [Immigrant integration indicators: 2021 annual statistics report]*, ACM, Lisbon,, ACM, Lisbon, Table 3.1,p.63, https://www.om.acm.gov.pt/documents/58428/383402/Relat%C3%B3rio+Estat%C3%ADstico+Anual+2020++Indicadores+de+Integra%C3%A7%C3%A3o+de+Imigrantes/472e60e5-bfff-40ee-b104-5e364f4d6a63 (accessed on 02 September 2021).

The PISA study collects information on students with an immigrant background based on the place of birth of both the student and their parents. However, PISA does not have information on the nationality status of students, meaning that the population described in the previous paragraph and through this review and defined as “foreigners” does not fully overlap with that of students with immigrant background analysed by OECD data. For instance, students born from first-generation immigrants may have Portuguese nationality, thus being counted as nationals in the Portuguese data and as having immigrant background in PISA.

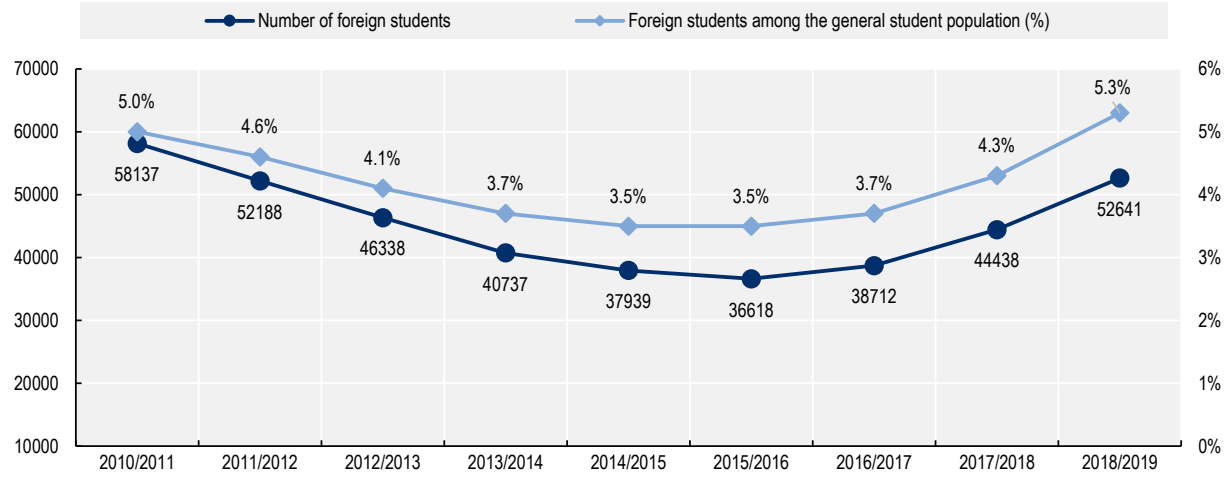
Nevertheless, the descriptive analyses on foreign individuals in the country can provide some contextual information about the student population.

According to PISA 2018, on average across OECD countries, 13% of students had an immigrant background, compared to 10% in 2009. In Portugal, about 7% of students had an immigrant background, up from 5% in 2009, with a slightly greater increase in the number of second-generation students (+1%) than first-generation students (+0.5%) (OECD, 2019[24]). Portugal is considered to be among new destination countries with large populations of low educated immigrants. Evidence shows that children with an immigrant background who grow up in these destination countries tend to have poorer academic and well-being outcomes than their native-born peers (*Ibid.*).

While there was a significant decrease in the number of foreign students between 2010 and 2015[8], the opposite trend emerged in 2016 (Figure 1.9). The rise in the foreign population living in Portugal (+2.3% in 2016, +6.0% in 2017, +13.9% in 201, +22.9% in 2019 and +12.2% on 2020) translated into an increase of foreign students in Portuguese schools. ACM estimates that during the 2018/2019 school year, there were 52 641 students with a foreign nationality (referred to as foreign students) in the country, which represents an increase of 18.5% from the previous school year. Still according to ACM, during the 2019/2020 school year, there were 68 018 foreign students, representing an increase of 29.2% from the previous school year.

Figure 1.9. Foreign students in Portugal Mainland (2010/2011 - 2018/2019)

Share of foreign students enrolled in basic and secondary education among the general student population across school years



Source: Oliveira, C. R. (2021[22]), *Indicadores de integração de imigrantes: relatório estatístico annual 2021 [Immigrant integration indicators: 2021 annual statistics report]*, ACM, Lisbon, Figure 5.8., p.96, https://www.om.acm.gov.pt/documents/58428/383402/Relat%C3%B3rio+Estat%C3%ADstico+Anual+2021.pdf/e4dd5643-f282-4cc8-8be1-92aa499bb92f (accessed on 18 January 2022).

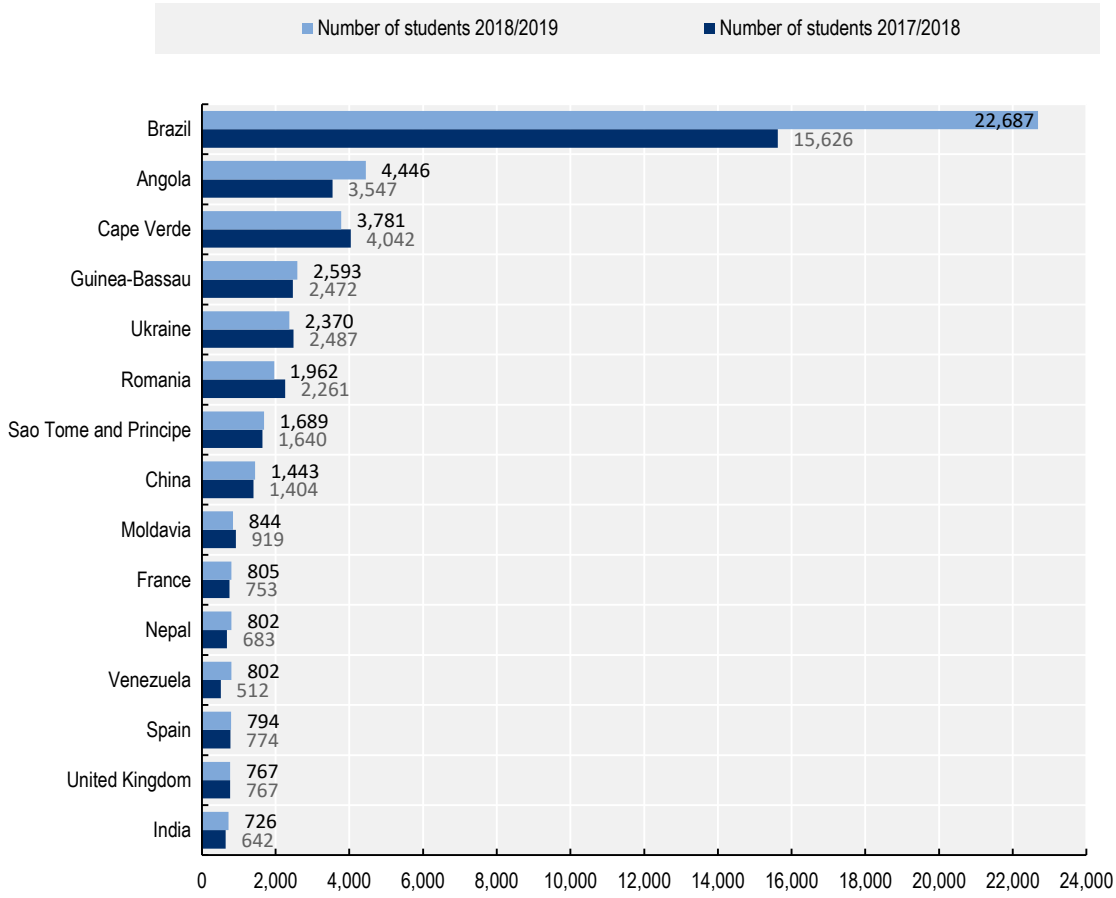
StatLink https://stat.link/8g5zrw

The majority of foreign students are enrolled in basic education (79.8% during the 2019/2020 school year), of which most are in the first cycle (34.9% against 17.7% in the second cycle and 27.2% in the third cycle). About 20.2% of these students (13 716 people) are enrolled in secondary education (Oliveira, 2021[22]).

There are many different nationalities in Portuguese public schools (in particular, 179 during the 2019/2020 school year, compared to 170 during the 2018/2019 school year). In the 2019/2020 school year, nearly half of the total foreign student population was from Latin America (49.1%), representing a significant increase from previous years (36.7% in 2017/2018 and 45% in 2018/2019). They were followed by students from Portuguese-speaking African countries (*Paises Africanos de Língua Oficial Portuguesa, PALOP*) (23.2%), the EU (10.8%), Eastern Europe (5.7%) and Asia (8.1%).

Among these groups, the most represented students are overwhelmingly students from Brazil (43.1% of the total foreign student population in 20118/2019 and 46.8% in 2019/2020), followed by students from Angola (8.4% and 9.2%), Cape Verde (9 7.2% and 6.1%), Guinea-Bissau (4.9% and 4.4%) and Ukraine (4.5% and 3.7%). Romanian students account for 2.8%, 2.8% of students came from Sao Tome and Principe and 2.2% from China in 2020. In spite of these variations, the ten most represented nationalities have remained almost the same in past years, and small changes occurred between the 2018/2019 and 2019/2020 school years. While the share of most student groups remained the same or decreased between the 2018/2019 and 2019/2020 school years, it significantly increased, as noted, for Brazilian students and slightly for students from Angola (from 8.4% to 9.2%), Venezuela (from 1.5% to 1.9%), Nepal (from 1.5% to 1.8%) and India (from 1.4% to 1.6%). In addition, in the academic year 2018/2019, French students (805, raising to 1 088 in 2019/2020), Nepalese students (802, raising to 1 192 in 2019/2020) and Venezuelan students (803, raising to 1 263 in 2019/2020) became more numerous than Spanish students (794, raising to 868 in 2019/2020) and English students (757, raising to 930 in 2019/2020) (Figure 1.10), see more Annex 1.A).

Figure 1.10. Number of enrolled foreign students in primary and secondary education, by the 15 most represented nationalities (2017/2018 - 2019/2020)



Sources: Adapted from Oliveira, C. R. (2021[22]), *Indicadores de integração de imigrantes: relatório estatístico annual 2021 [Immigrant integration indicators: 2021 annual statistics report]*, ACM, Lisbon, Figure 5.13., p.102, https://www.om.acm.gov.pt/documents/58428/383402/Relat%C3%B3rio+Estat%C3%ADstico+Anual+2021.pdf/e4dd5643-f282-4cc8-8be1-92aa499bb92f (accessed on 18 January 2022); and Oliveira, C. R. (2020[23]), Indicadores de integração de imigrantes: relatório estatístico annual 2020 [Immigrant integration indicators: 2020 annual statistics report], ACM, Lisbon, Figure 5.13, p.116, https://www.om.acm.gov.pt/documents/58428/383402/Relat%C3%B3rio+Estat%C3%ADstico+Anual+2020++Indicadores+de+Integra%C3%A7%C3%A3o+de+Imigrantes/472e60e5-bfff-40ee-b104-5e364f4d6a63, (accessed on 02 September 2021).

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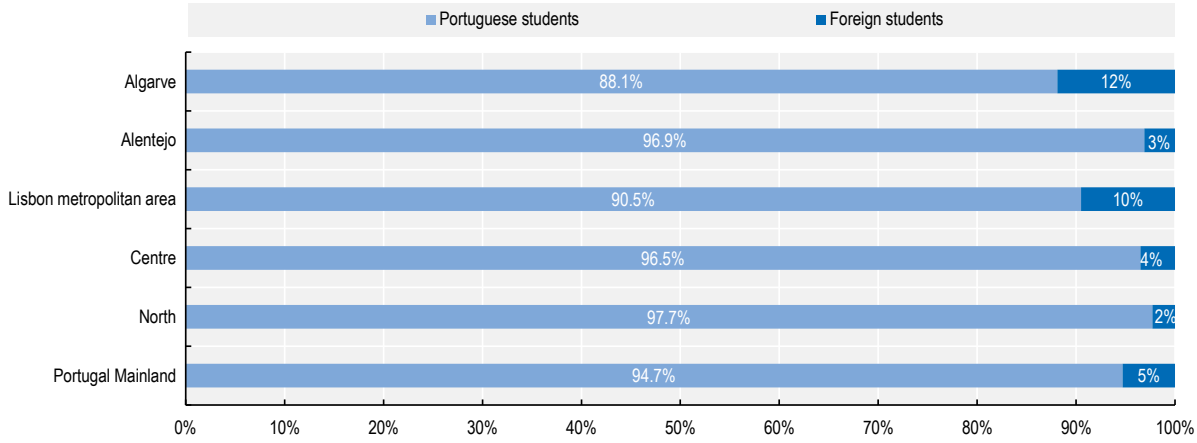
Furthermore, there is an unequal distribution of foreign students across Portugal Mainland (Figure 1.11). The Algarve and the Metropolitan Lisbon Area have respectively 13.2% and 11.5% of students who are foreign students, far ahead of the Centre (4.9%), Alentejo (4.4%), and the North (3.3%). Similarly, student nationalities are unevenly distributed across the different regions (see Figure 1.12). A large majority of students from Africa attend school in the region of Lisbon, while students from Europe are more evenly distributed between Lisbon, the Algarve and the Centre. For nearly all nationality groups, the smallest share goes to Alentejo.

Figure 1.11. Percentage of students enrolled in basic and secondary education, by nationality and region, Portugal Mainland (2019/2020)



Source: Adapted from Oliveira, C. R. (2021[22]), Indicadores de integração de imigrantes: relatório estatístico annual 2021 [Immigrant integration indicators: 2021 annual statistics report, ACM, Lisbon, Figure 5.12., p.99, https://www.om.acm.gov.pt/documents/58428/383402/Relat%C3%B3rio+Estat%C3%ADstico+Anual+2021.pdf/e4dd5643-f282-4cc8-8be1-92aa499bb92f (accessed on 18 January 2022).

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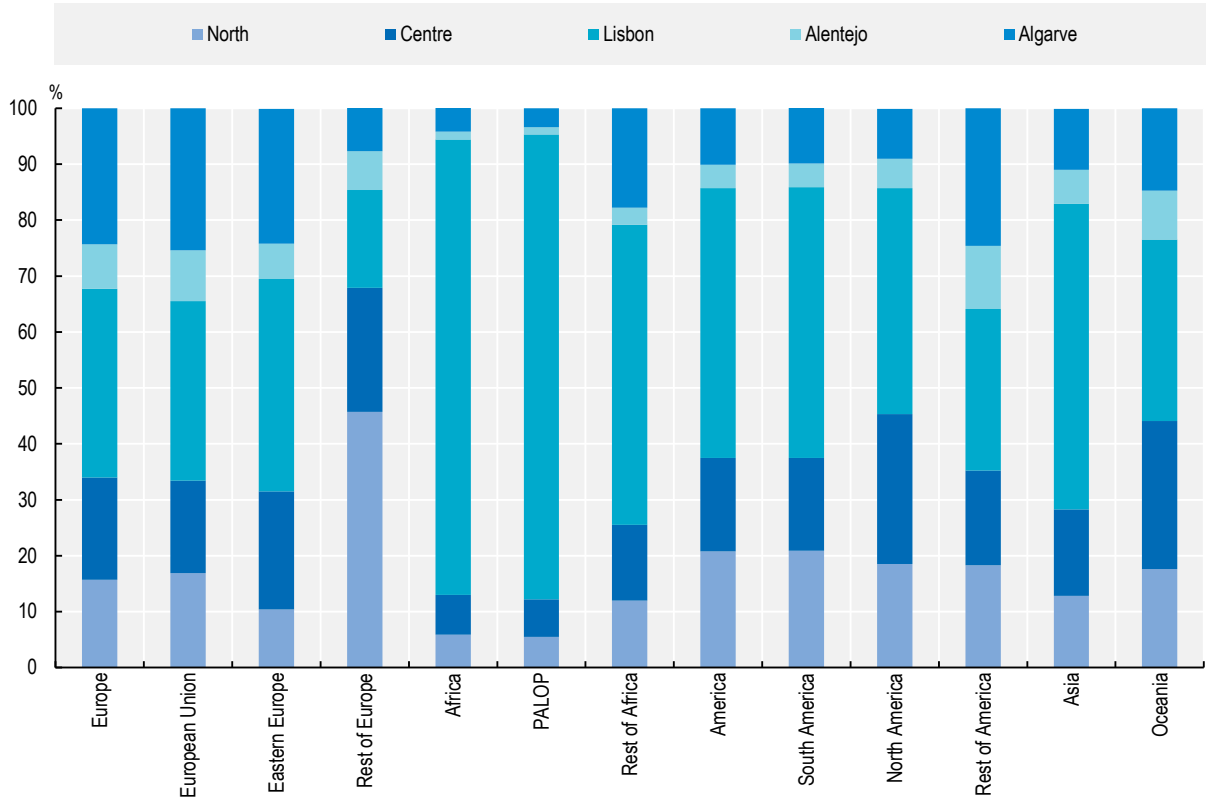
Figure 1.12. Percentage of foreign students enrolled in basic and secondary education by nationality groups and regions, Portugal Mainland (2019/2020)



Notes: For the 2019/2020 school year, the United Kingdom is still included in the group of European Union countries since it left the European Union only in December 2020.
PALOP stands for "Portuguese-speaking African Countries".
Source: Adaptation from Oliveira, C. (2021[22]), Indicadores de integração de imigrantes: relatório estatístico annual 2021 [Immigrant integration indicators: 2021 annual statistics report], ACM, Lisbon, Table 5.1, p.100, https://www.om.acm.gov.pt/documents/58428/383402/Relat%C3%B3rio+Estat%C3%ADstico+Anual+2021.pdf/e4dd5643-f282-4cc8-8be1-92aa499bb92f (accessed on 18 January 2022).

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Academic outcomes of students with an immigrant background

In terms of student performance, the average difference in reading performance in PISA 2018 between students with an immigrant background and students without an immigrant background in Portugal was 32 score points in favour of non-immigrant students. After accounting for students' and schools' socio-economic profiles, the difference shrank to 26 score points. Second-generation students with an immigrant background scored higher (483) than first-generation students (436), which was a trend observed in most countries. Portugal is also among the countries/economies with a share of academically resilient students with an immigrant background, not significantly different from the OECD average with respectively 17.1% and 16.8% (Cerna, Brussino. and Mezzanotte, 2021[25]). Furthermore, on average across OECD countries, 17% of immigrant students scored in the top quarter of reading performance in 2018. Similarly, in Portugal, 17% of immigrant students performed at this level (OECD, 2019[24]).

In a recent study conducted in the Metropolitan Area of Lisbon, de Almeida et al. (2021[21]) found that there are significant differences in the performance of students with an immigrant background depending on

their immigrant background and place of birth. In particular, most first and second-generation immigrant students perform worse than their non-immigrant peers, and students from Brazil and PALOP countries show the highest differences in school results compared to native-born students.

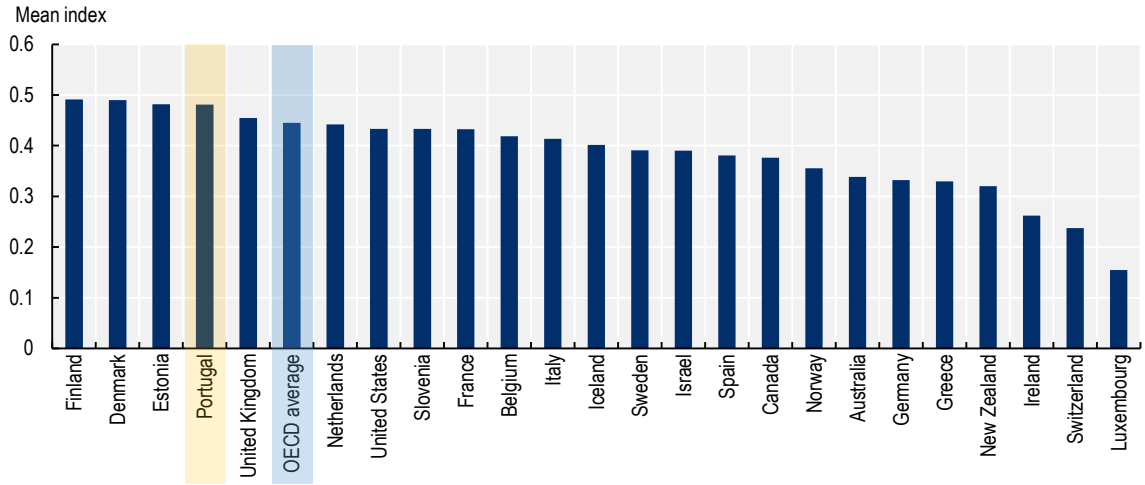
Oliveira (2021[22]), using DGEEC data, also found that the rate of transition/conclusion of primary and secondary students was consistently lower for foreign students between the 2011/2012 and the 2019/2020 school years. This rate increased from 79.0% in the 2011/2012 school year to 87.8% in 2018/2019 and 92.3% in 2019/2020 in basic education and it increased to 73.7% in secondary education, suggesting steady improvements, in particular in recent years. There are, nonetheless, significant differences between students from different nationalities (see Annex 1.B). Furthermore, Eurydice (European Commission/EACEA/Eurydice, 2019[26]) estimates that, in 2017, slightly more students with an immigrant background (13.9%) than their native-born peers (12.5%) were early leavers from education.

Isolation of students with an immigrant background

Using an isolation index of immigrant students in schools, PISA 2018 analysed the segregation of students in schools (OECD, 2019[24]). It did so by measuring the probability that native-born and students with an immigrant background would interact, along an index ranging from 0 to 1. An index value of 1 indicates a fully segregated school where it is unlikely for students without an immigrant background to be enrolled. Instead, a value of 0 indicates no segregation of students based on immigrant background. Portugal scored 0.48 on the index, above the OECD average of 0.45. This shows that, on average, a student with an immigrant background in Portugal is more likely to be segregated from students without such a background in comparison to in most other OECD countries (see Figure 1.13). Portugal is one of the participating countries that has a relatively large proportion of immigrant students and in which segregation of these students across schools is quite prevalent, along with Denmark, Estonia, Finland and the United Kingdom (OECD, 2019[24]).

Figure 1.13. Segregation of immigrant students across countries (PISA 2018)

Index of isolation of immigrant students at school



Notes: Countries where less than 5% of students had an immigrant background are not represented in the Figure.
The isolation index measures whether immigrant students are concentrated in some schools. The index is related to the likelihood of a representative immigrant student to be enrolled in schools that enrol not immigrant student. It ranges from 0 to 1, with 0 corresponding to no segregation and 1 to full segregation.
Countries and economies are ranked in descending order in the index of isolation.
Source: OECD (2019[24]), *PISA 2018 Results (Volume II): Where All Students Can Succeed*, Figure II.9.8, https://doi.org/10.1787/b5fd1b8f-en.

StatLink https://stat.link/qf4gtw

Attitudes and sense of belonging

PISA 2018 also measured students' attitudes towards immigrants, developing an index of attitudes based on a set of statements that respondents could address on a scale from strongly disagree to strongly agree[9]. A positive value in this index indicates that students have more positive attitudes towards immigrants than the average student across OECD countries. Portugal is among the group of countries that reported the most positive attitudes towards immigrants. It has the highest index (0.5) among participating countries, along with Canada and Korea. However, it is also the country with the highest difference between different groups in the index of students' attitudes towards immigrants, meaning that girls, socio-economically disadvantaged students and students with an immigrant background have more positive attitudes towards immigrants than boys, socio-economically advantaged students and native-born students (OECD, 2020[27]). This suggests that there exist large differences in attitudes towards immigrants and that the population is very heterogeneous, even though the overall results are positive compared to the OECD average.

Similarly, Eurydice (European Commission/EACEA/Eurydice, 2019[26]) reports that, in primary schools, while there is no significant difference in terms of sense of belonging between students who do not speak the language of instruction at home and their peers, the former experience significantly more bullying than the latter. Portugal is thus among the countries where the difference between these two groups of students is the highest.

Prevalence and distribution of Roma communities across Portugal

Roma communities form the largest ethnic minority group in the European continent. They represent between 10 and 12 million people, with an estimated population share in the EU that ranges from 10.3% in Bulgaria, 9.1% in the Slovak Republic, 8.3% in Romania, 7% in Hungary, 2.5% in Greece, 2% in the Czech Republic, 1.6% in Spain to less than 1% in most other countries including Portugal (European Commission, 2018[28]). Unfortunately, due to the lack of systematic data collection, it is not possible to give an exact account of the number of Roma people in Portugal. This is mainly due to the fact that, as in many European countries, the legislation forbids data collection on personal characteristics such as ethnicity (Rutigliano, 2020[29]). However, the most recent estimates from 2015/2016 indicate that there are around 37 000 Roma people in Portugal, representing approximately 0.4% of the population.[10] Some researchers estimate that the Roma population could be between 40 000 and 50 000 people, or even higher (Liégeois, 2015[30]). During the country visit, the OECD review team heard from Roma associations that these numbers might be higher, most likely between 75 000 and 100 000 Roma people in the country.

A 2014 report by the Portuguese Observatory of Roma Communities (*Observatório das Comunidades Ciganas*, ObCig), based on a survey that identified nearly 24 210 Roma people (separated in 822 communities) among all Roma living across the country, noted that Roma communities might nonetheless be relatively evenly distributed across regions, with a slight majority of them living in the North (24.8%), followed by the Centre (23.2%), the region of Lisbon (22.8%) and Alentejo (20.2%), but the Algarve (9.1%) being the exception. However, Roma communities are rather unevenly distributed within regions (Mendes, Magano and Candeias, 2014[31]).[11] Most of them might live in major districts, with the highest concentrations in Lisbon, Porto, Faro, Aveiro, Beja and Braga.

Roma communities in Portugal face significant challenges. In most European countries, Roma people have a higher chance of living in poverty, suffering from hunger, living in a precarious household, and being under-educated and unemployed – a situation that has not substantially changed since 2011 (Rutigliano, 2020[29]). The situation is no exception in Portugal. For example, in the European Union Agency for Fundamental Rights (FRA) 2016 Minority Survey, when asked about their ability to “make ends meet”, 74% of Portuguese Roma respondents said that they did so with great difficulty. Only 4% responded that it was fairly easy, and the rest stated that they made ends meet with difficulty or some difficulty (FRA, 2018[32]). The study also identified that 38% of Portuguese Roma respondents lived in a household with a current low work intensity[12] compared to 12% of the general population. Moreover, in 2016 in Portugal, 14% of Roma people lived in households without tap water inside the dwelling, compared to 3% among the general population, and 17% lived in households without a toilet, bathroom or shower, compared to 1% in the general population. However, among participating countries, Portugal has the second-highest rate (96%) of Roma aged 16 or over who indicated coverage by national basic health insurance and/or additional insurance, closely following Spain (98%). In addition, about 70% of respondents assessed their general health as good or very good, compared to 74% of the general population (*ibid*.).

There is limited data available to assess the situation of Roma people in education specifically. At the national level, in 2017, DGEEC published the first School Profile of Roma Communities (*Perfil Escolar das Comunidades Ciganas*) for the 2016/2017 school year, which was repeated for the school year 2018/2019.[13] This Profile contains a series of statistical tables on Roma students enrolled in education in Portuguese public schools. It is the result of a survey conducted by DGEEC, in collaboration with the Directorate-General for Education (*Direção-Geral da Educação*, DGE), through a questionnaire distributed to schools across the country. For the 2018/2019 school year, 70.2% of Portuguese public schools participated in the survey (compared to 47.2% for the 2016/2017 school year). About 70% of respondents reported having Roma students in their school.

According to the School Profile, there were approximately 25 140 Roma students enrolled in Portuguese public schools who responded to the survey during the 2018/2019 school year. A large majority of Roma students are enrolled in basic education (87.2%), but only a small share are in secondary education (2.6%). Furthermore, the School Profile shows that a majority of enrolled Roma students are in the North (40.3%), followed by the Metropolitan Area of Lisbon (21.1%), the Centre (18.9%), Alentejo (15.0%) and the Algarve (4.7%) (Table 1.5). Braga, Porto and Lisbon have the highest numbers of Roma students enrolled in public schools (Figure 1.14). The share of Roma students among the general pre-school, basic and secondary education student population is the highest in Alentejo (4.0%), followed by the North (2.3%). Roma students represent 1.8% of the total student population in the Centre and the Algarve and 1.5% in the Metropolitan Area of Lisbon (Table 1.6).

Table 1.5. Number of Roma students enrolled in Portuguese public schools by level of education (2018/2019)

	Education level						
	Pre-primary education	Basic education			Basic education total	Secondary education	Total
		1st cycle	2nd cycle	3rd cycle			
Number of students	2 570	11 138	6 097	4 684	21 919	651	25 140
Distribution	10.2%	44.3%	24.3%	18.6%	87.2%	2.6%	100.0%

Source: DGEEC (2020[33]), School Profile of Roma Communities, https://www.dgeec.mec.pt/np4/97/ (accessed on 25 August 2021).

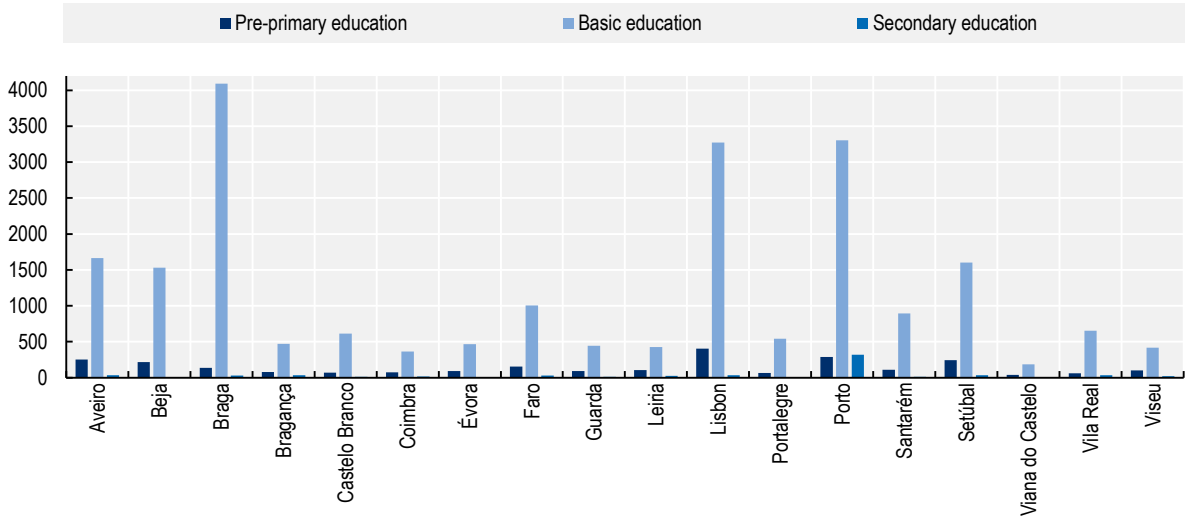
Table 1.6. Number of Roma students in public schools by level of education by regions and share among the general student population (2018/2019)

Region	Pre-primary education	Basic education	Secondary education	Total	Share among the Roma student population	Share among the general student population
North	663	9 030	430	10 123	40.3%	2.3%
Centre	696	3 980	102	4 778	18.9%	1.8%
Metropolitan Area of Lisbon	598	4 639	65	5 302	21.1%	1.5%
Alentejo	461	3 266	26	3 753	14.9%	4.0%
Algarve	152	1 004	28	1 184	4.7%	1.8%

Source: Adapted from DGEEC (2021[4]), Education Statistics, Table 1.6., http://estatisticas-educacao.dgeec.mec.pt/eef/2019/ (accessed on 25 August 2021) and DGEEC (2020[33]), School Profile of Roma Communities, https://www.dgeec.mec.pt/np4/97/ (accessed on 25 August 2021).

In terms of Roma student participation, FRA (2018[32]) identified that, in Portugal, in 2016, 42% of Roma children participated in early childhood education and care (31% of Roma boys and 51% of Roma girls), while 90% of compulsory school age Roma children participated in education (with no gender variation). However, about 90% of Roma were early school leavers, with slightly more Roma women (91%) than Roma men (89%) being early leavers, compared to 14% among the general population. This suggests that educational attainment is considerably low among the Roma population. This number is the second-highest after Greece (92%) among the European countries surveyed. While consistent data are missing regarding secondary education, Figure 1.14 suggests that very few Roma young people participate in education at this level.

Figure 1.14. Number of Roma students enrolled in public schools by districts and levels of education (2018/2019)



Source: DGEEC (2020[33]), School Profile of Roma Communities, https://www.dgeec.mec.pt/np4/97/ (accessed on 25 August 2021).

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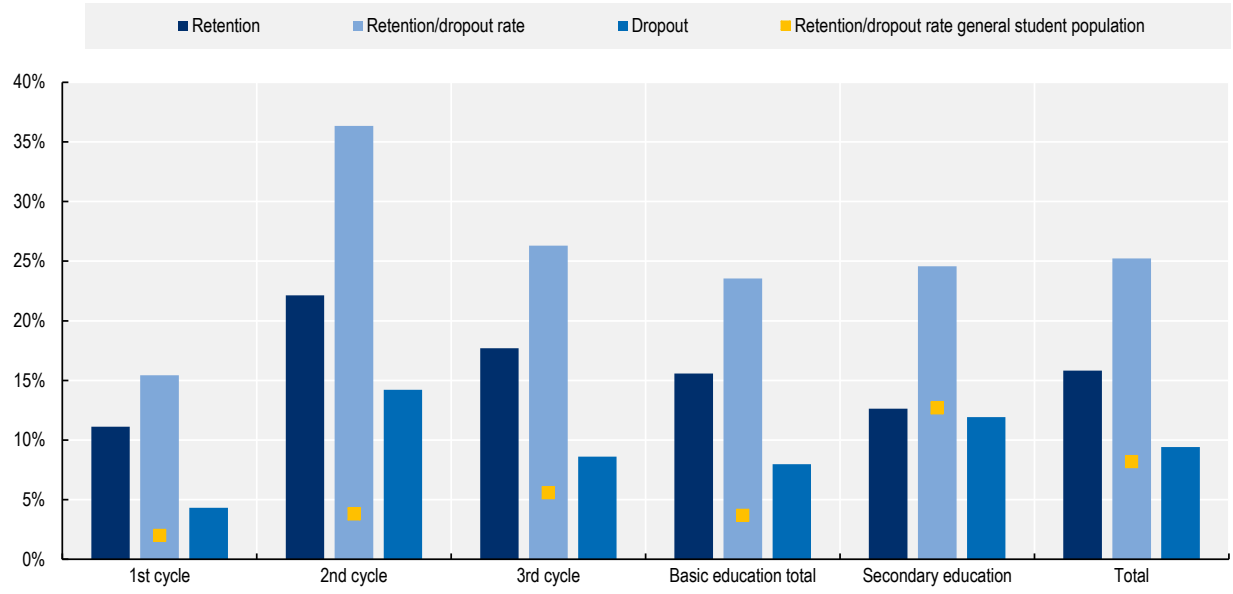
According to the DGEEC School Profile of Roma Communities 2018/2019, retention and dropout rates are high among Roma students compared to the general population (Figure 1.15). The overall retention/dropout rate reaches 25% among Roma students compared to 8.2% among the general population, the highest rate being in the 2nd cycle, followed by the 3rd cycle and secondary education. Most Roma dropout during the 2nd cycle and secondary education, while most repeat grades in the 2nd and 3rd cycles.

Figure 1.15. Retention and dropout rates among the Roma students in Portuguese public schools (2018/2019)



Source: Adapted from DGEEC (2020[33]), School Profile of Roma Communities, https://www.dgeec.mec.pt/np4/97/ (accessed on 25 August 2021).

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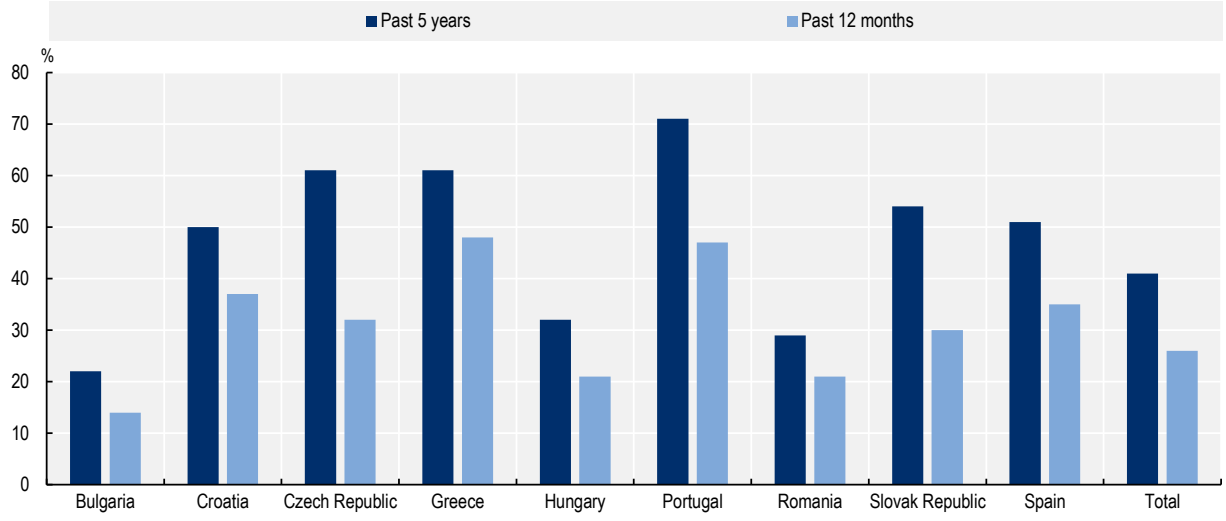
Discrimination

Available data also show that Roma communities face significant discrimination issues in Portugal. The FRA Survey (2018[32]) found that in Portugal in 2016, 71% of Roma respondents reported feeling discriminated against based on their Roma background in at least one of the domains covered in the five years preceding the study. About 47% of them felt discriminated against in the 12 months preceding the study. Portugal is the country covered by the study where most Roma responded feeling discriminated against based on their ethnic origin, well above the total average in participating countries (see Figure 1.16). According to the data collected, discrimination is the strongest when looking for work and housing and the lowest in education, though still significant. About 13% of Roma respondents reported being discriminated against in the last five years while affiliated with the school (as parents or students) because they were Roma. Segregation remains an issue for Roma students, too. FRA estimates that 19% of Roma students between the ages of 6 and 15 attended classes in which “most” of their classmates were Roma.

Figure 1.16. Overall prevalence of discrimination based on Roma background, by EU Member State (%)

*Respondents reporting feeling discriminated based on Roma background in at least one of the domains of daily life in the 5 years and 12 months prior to the survey (%)**



Notes: *Out of all Roma respondents at risk of discrimination on the grounds of Roma background in at least one of the domains of daily life asked about in the survey ('Past 5 years': n=7 745; 'Past 12 months': n=7 875); weighted results.
Domains of daily life asked about in the survey: looking for work, at work, education (self or as parent), health, housing, and other public or private services (public administration, restaurant or bar, public transport, shop).
Discrimination experiences in "access to health care" were asked about only for the past 12 months, which explains the different sample sizes (n) for the two reference periods.
Source: FRA (2018[32]), EU-MIDIS II 2016, Roma, https://fra.europa.eu/sites/default/files/fra_uploads/fra-2016-eu-minorities-survey-roma-selected-findings_en.pdf (accessed on 03 September 2021).

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Students with special education needs (SEN)

In this report, the term "special education needs" (SEN) is used to refer to the broad array of needs of students who are affected by learning disabilities, physical impairments and/or who suffer from mental disorders. There are significant variations regarding the definitions and categories of SEN used across OECD countries (Brussino, 2020[34]). Following Decree Law No. 54/2018, 6 July, on inclusive education (see Chapter 2), Portugal abandoned the system of categorisation of students. As such, the term "special education needs" is no longer used. Instead, Portugal is using the expression "students in need of support measures", which comprises three categories of measures and can apply to any student (Box 1.2). This report uses the term SEN to differentiate these students from other student groups.

Box 1.2. Portugal's shift away from labelling students

Mixed evidence on labelling

Research evidence on the implications of labelling students' learning experiences and outcomes is inconclusive. Some studies suggest that labelling is inevitable and serves some positive purposes. For example, it helps bring consistency to research and communication regarding SEN and is particularly useful in testing, evaluation, assessment and placement of students in special programmes (Ormrod, 2008[35]; Thomson, 2012[36]). Others have argued that labelling has negative consequences for stereotyping and grouping people rather than seeing them as individuals (Osterholm, Nash and Kritsonis, 2007[37]).

In a recent mapping of special provision approaches, the European Agency For Special Needs and Inclusive Education (2020) notes that school staff tend to face difficulties in addressing learners' needs without labelling the learners. The report also highlights that various countries are changing their approaches to prevent unnecessary and potentially harmful labelling of learners as a prerequisite for official decisions on SEN (European Agency for Special Needs and Inclusive Education, 2020[38]).

For example, Thomson (2012[36]) investigated the relationships between main concepts associated with labelling gifted students and the impact on their self-esteem in the existing literature. The author concluded that, although special education professionals argue that labelling can be helpful because it provides a common language to describe and recognise a specific need, it can also be harmful when, as a result of that label, individuals are degraded, discriminated against, excluded from society or placed in classrooms without regard for their individuality. A more recent scoping review that examined the perceptions and outcomes of autism diagnostic disclosure to others found discrepancies in perspectives between others and people with autism. While "others" perceive disclosure as having positive effects on social acceptance and perceptions of disability for people with autism, particularly when explanatory information about autism was provided with the autism label, people with autism were reluctant to disclose diagnosis due to perceived negative outcomes and stigma (Thompson-Hodgetts and al., 2020[39]).

Portugal's move away from categorisation

Decree Law No. 54/2018 of 6 July on Inclusive Education initiates a move away from the rationale that it is necessary to categorise to intervene. It requires identification processes and decisions for educational support to be defined and implemented at the school level according to national guidelines. Students are not categorised, or labelled, according to their personal characteristics (e.g. SEN, immigrant background, Roma background), but according to the type of educational support measure(s) they need.

Article 20 of the Decree Law states that the process to identify students in need of support measures must be done at the school level as early as possible through the collaboration of parents/guardians, teachers, relevant non-teaching staff and social services. Once a student has been identified as in need of additional measures, a request is made to the school leader who must approve the assessment made and mobilise the multidisciplinary team. The Decree Law requires each school cluster to have a multidisciplinary team whose purpose is to support inclusion. In particular, the team is responsible for the identification of students in need of support measures, the implementation and monitoring of these measures and, if necessary, the writing of technical-pedagogical reports on individual students.

New categories and implications for data collection

Therefore, the notion of "student in need of support measures" comes to replace the notion of "special education needs" and the associated categories, or any other category. Any student, from any

background, can be a student in need of support measures. There are three broad categories of support measures, which are explained in greater details in Chapter 2: (1) universal measures; (2) selective measures; (3) additional measures. Each category contains a set of measures, ranging from tutoring, curriculum accommodation or enrichment to tutoring, pedagogical-psychological support and the redesigning of the pedagogical strategy, including significant curricular adjustments.

This new categorisation system takes into account the support students receive and not their personal characteristics. This logic has substantial implications regarding the data collection process. First, as mentioned, Portugal considers that labelling has a negative impact on students. Second, the law forbids Portugal from collecting data based on personal characteristics, except nationality and gender. Some data on students with SEN and from ethnic groups are available, but those are based on school leaders' perception and not on questionnaires directly answered by students or their family. At the time of writing, DGEEC is collecting data on the number of students receiving support measures in each category set out above. The objective is to inform the system on the measures implemented in schools and the needs of schools across the country.

Participation

Each school year between 2010/2011 and 2017/2018, DGEEC sent a questionnaire to Portuguese schools to develop knowledge on students with SEN, the challenges they face and educational measures to respond to these challenges. The questionnaires also provide information on human resources dedicated to address students with SEN and reference school clusters in the area of early intervention.[14]

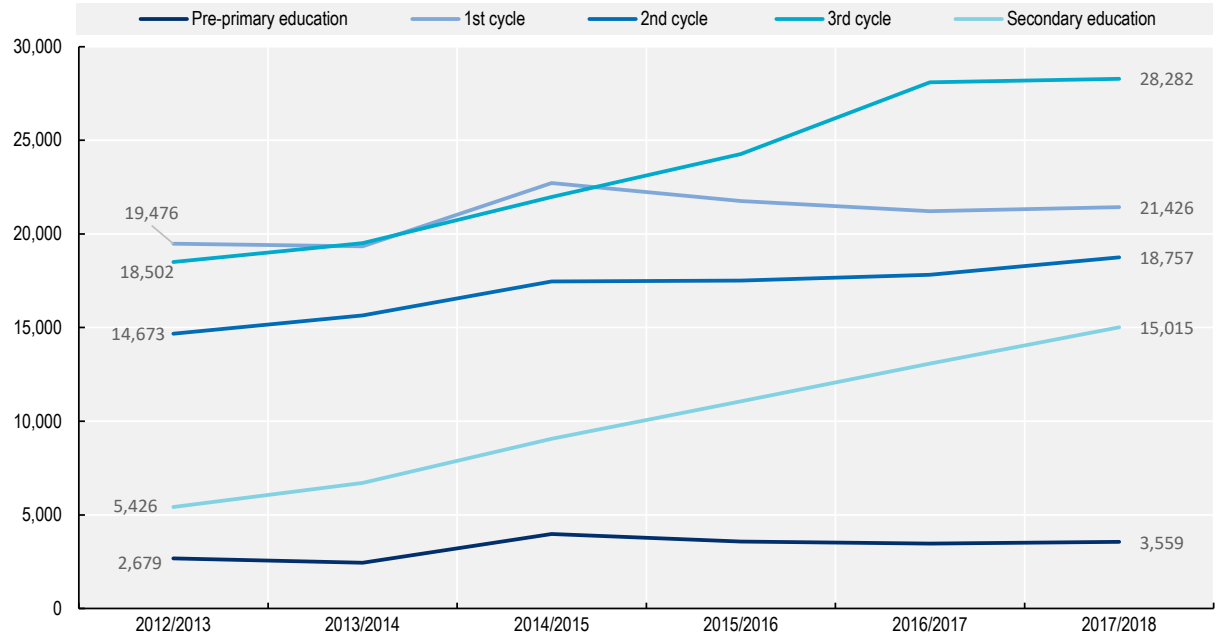
During the 2017/2018 school year, there were 87 039 students with SEN in Portuguese schools, including 3 559 in pre-school, 65 132 in basic education and 13 077 in secondary education (see Table 1.7). The number of students with SEN enrolled in mainstream schools has increased since the 2012/2013 school year, mainly in the 3rd cycle and secondary education (Figure 1.17). Overall, it increased by 7% between the 2016/2017 and 2017/2018 school years.

Table 1.7. Number of students with SEN enrolled by level of education and region (2017/2018)

Regions	Students	Total	Pre-primary education	Basic education				Secondary education
				Total Basic education	1st cycle	2nd cycle	3rd cycle	
Portugal Mainland	Number of students	87 039	3 559	68 465	21 426	18 757	28 282	15 015
	% of students	100.00%	4.10%	78.70%	24.60%	21.60%	32.50%	17.30%
North	Number of students	23 550	1 074	18 258	5 746	4 823	7 689	4 218
	% of students	100.00%	4.60%	77.50%	24.40%	20.50%	32.60%	17.90%
Centre	Number of students	22 836	589	17 506	4 997	4 814	7 695	4 741
	% of students	100.00%	2.60%	76.70%	21.90%	21.10%	33.70%	20.80%
Lisbon Metropolitan Area	Number of students	28 405	1 486	22 817	7 586	6 350	8 881	4 102
	% of students	100.00%	5.20%	80.30%	26.70%	22.40%	31.30%	14.40%
Alentejo	Number of students	7 959	254	6 517	2 081	1 798	2 638	1 188
	% of students	100.00%	3.20%	81.90%	26.10%	22.60%	33.10%	14.90%
Algarve	Number of students	4 289	156	3 367	1 016	972	1 379	766
	% of students	100.00%	3.60%	78.50%	23.70%	22.70%	32.20%	17.90%

Source: Adapted from DGEEC (2018[40]), Special Education Needs 2017/2018, https://www.dgeec.mec.pt/np4/224/ (accessed on 01 September 2021).

Figure 1.17. Number of students with SEN enrolled in mainstream schools, by level of education, Portugal Mainland (2012/2013 - 2017/2018)



Source: Adapted from DGEEC (2018[40]), Special Education Needs 2017/2018, https://www.dgeec.mec.pt/np4/224/ (accessed on 01 September 2021).

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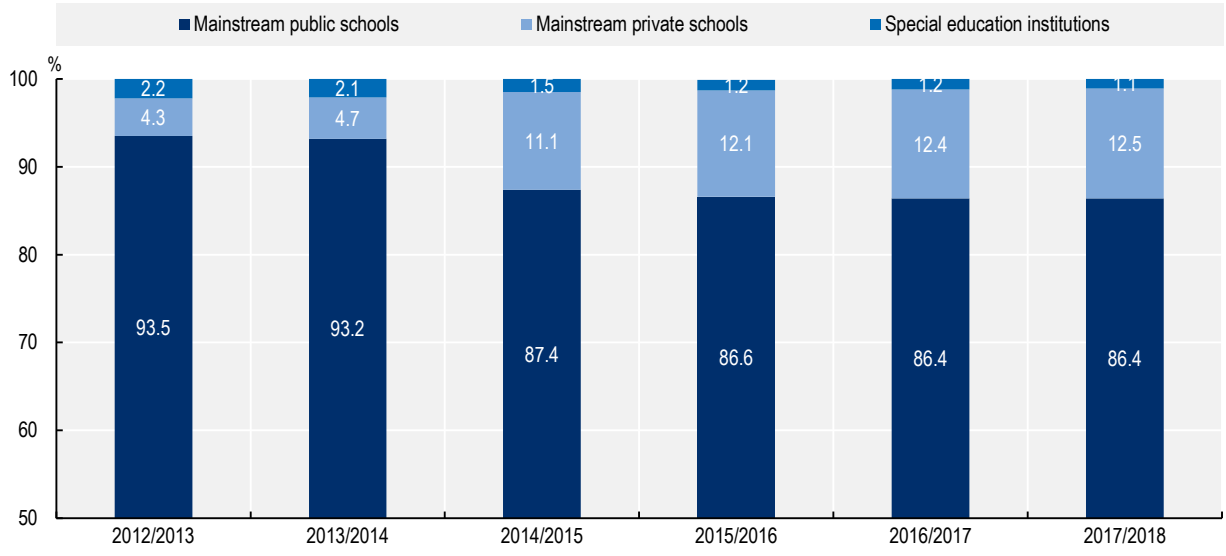
Besides public and private (both state-dependent and independent) schools, students with SEN can also enrol in private special education schools, which are private institutions that depend on cooperatives or parent associations. Private for-profit separate schools are highly concentrated in Lisbon and on the coast, with very few available inland. As for mainstream schools, the school calendar for private special education schools is defined annually by the MoE. Special education schools close for holidays for 30 days. However, they have to ensure students remain engaged through the organisation of free activities in periods outside of school activities, during school holidays and at all times of academic interruption. Since the 2009/2010 school year, following the Decree Law No. 3/2008, students in need of additional support have increasingly enrolled in mainstream schools, and most publicly-funded private special education schools have been turned into Resource Centres for Inclusion (*Centros de Recursos para a Inclusão*, CRIs; see Chapters 3 and 4).

Portugal has a one-track approach for the enrolment of students with SEN in education settings. This means that mainstreaming is the most common approach and that there are only a few specialised structures for students with special education needs. In mainstream schools, programmes and activities are adapted to address the individual needs of students with SEN and various services are provided to support their learning and broader well-being (Brussino, 2020[34]). An exceptionally high rate of students with SEN attend mainstream schools, which kept increasing between 2012 and 2018 (Figure 1.18). The latest available data show that in 2018, 98.9% of students with SEN were enrolled in mainstream schools, while the remaining 1.1% of students were enrolled in private institutions (Campos Pinto and Faneca, 2020[41]). Most students with SEN attend public schools (86.4% in 2017/2018), though an increasing number of them enrol in mainstream private schools (12.5% in 2017/2018 against 4.3% in 2012/2013).

Figure 1.18. Students with SEN enrolled in education by types of school (%), Portugal Mainland (2012/2013 - 2017/2018)



Source: DGEEC (2018[40]), Special Education Needs 2017/2018, https://www.dgeec.mec.pt/np4/224/ (accessed on 01 September 2021).

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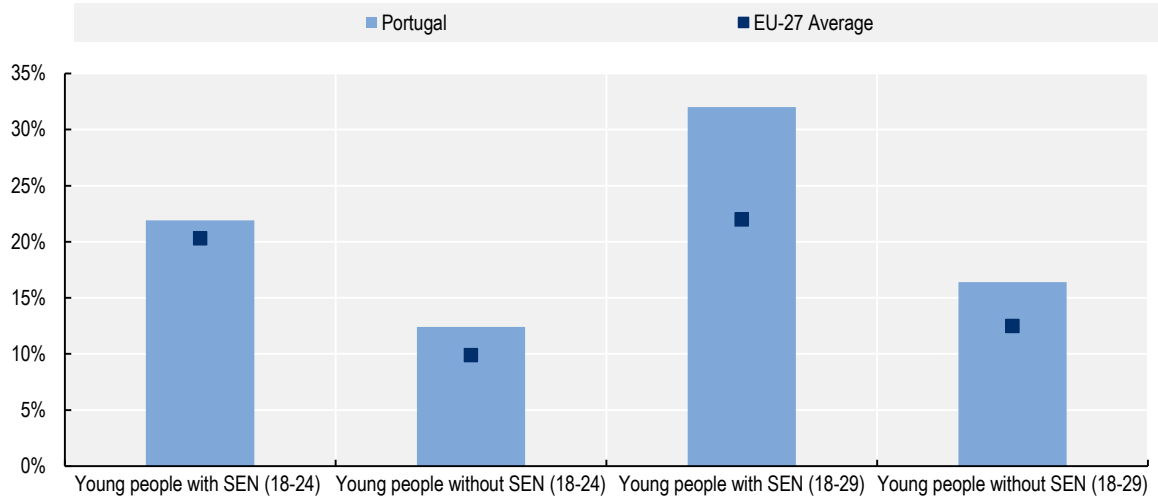
Early school leaving

The Disabilities and Human Rights Observatory (*Observatório da Deficiência e Direitos Humanos*, ODDH) highlights that students with SEN in Portugal tend to have poorer outcomes than students without SEN (Campos Pinto and Faneca, 2020[41]). The rate of students with SEN who are early school leavers is significantly higher than for students without SEN. In 2018, among the population aged 18 to 24, 21.9% of people with SEN were early school leavers compared to 12.4% among people without SEN. This rate was also slightly higher than the EU-27 average for both people with SEN (20.3%) and without SEN (9.9%). The gap between the SEN population and the general population increases considerably among the population aged 18 to 29 (Figure 1.19). The authors note a decrease in early school leavers among people with SEN since 2015, a decrease of 2.2% among the population aged 18 to 24 and of 3.9% among the population aged 18 to 29. In spite of existing challenges, Campos Pinto and Faneca (2020[41]) highlight progress in terms of access to university (+16.8% between the 2018/2019 and the 2019/2020 school years) as well as improvements in terms of accessibility.

Figure 1.19. Early school leaving among students with SEN and the general student population (2018)

Percentage of early school leavers aged 18-24 and 18-29 in Portugal, compared to EU-27 Average



Source: Campos Pinto and Faneca (2020[41]), *Pessoas com Deficiência em Portugal - Indicadores de Direitos Humanos 2020 [People with Disability in Portugal – Human Rights Indicators 2020]*, http://oddh.iscsp.ulisboa.pt/index.php/pt/2013-04-24-18-50-23/publicacoes-dos-investigadores-oddh/item/483-relatorio-oddh-2020 (accessed on 01 September 2021).

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Socio-economic background

Performance and attainment

In Portugal, the socio-economic background of students has an impact on their academic outcomes. According to PISA 2018, socio-economic status was a strong predictor of performance in reading, mathematics and science. In particular, advantaged students outperformed disadvantaged students in reading by 95 score points. The percentage of variance in reading performance explained by economic, social and cultural status (ESCS) is only slightly higher than the OECD average (13.5% against 12%). Moreover, many high-performing disadvantaged students held lower ambitions than would be expected given their academic achievement. Only three in four high-achieving disadvantaged students expect to complete tertiary education compared to almost all high-achieving advantaged students (OECD, 2019[24]).

Portugal does not collect data specifically on students' socio-economic status. DGEEC collects data on students benefitting from the School Social Assistance (*Ação Social Escolar, ASE*). The ASE is a programme implemented in 1971 to prevent social exclusion and school dropout by giving students from more disadvantaged socio-economic backgrounds the opportunity to complete compulsory schooling successfully. Eligibility for financial aid is structured by income brackets. Students in bracket A, corresponding to students with families with the lowest income, receive the most support, including free meals and textbooks. Students in bracket B also receive significant support, although less than students in bracket A (e.g., they have to pay 50% of the price of school meals). Students in bracket C are students in families with the highest income and do not receive any support (Ministry of Education, 2022[5]).

National data supports the PISA assessment that socio-economic status has a strong impact on students' outcomes. The National Council of Education notes, for example, that most students who benefitted from the ASE during the 2017/2018 school year were those following curricular alternative pathways in the 2nd

and 3rd cycles, education and training courses in the 3rd cycle and VET classes in the secondary, which might indicate a relationship between disadvantaged socio-economic status and (1) learning difficulties and (2) social determinism (CNE, 2019[15]). Furthermore, fewer students receiving the ASE in brackets A and B finish the different levels of education within the expected amount of time, compared to their peers who do not benefit from ASE. For example, during the 2018/2019 school year, 56% of students who were not covered by ASE finished the 3rd cycle of basic education in three years and with positive results on the national examinations (compared to 47% on 2015/2016). There were only 21% among students in bracket A and 28% in bracket B who did so (DGEEC, 2021[42]) (see Table 1.8). This suggests that students from more disadvantaged socio-economic backgrounds might have significantly higher rates of grade repetition, lower scores in national examinations and are more likely to attend classes with younger peers.

Table 1.8. Students receiving ASE who complete education within the expected time and achieve positive results on national exams, by levels of education and ASE brackets (2017/2018 and 2018/2019)

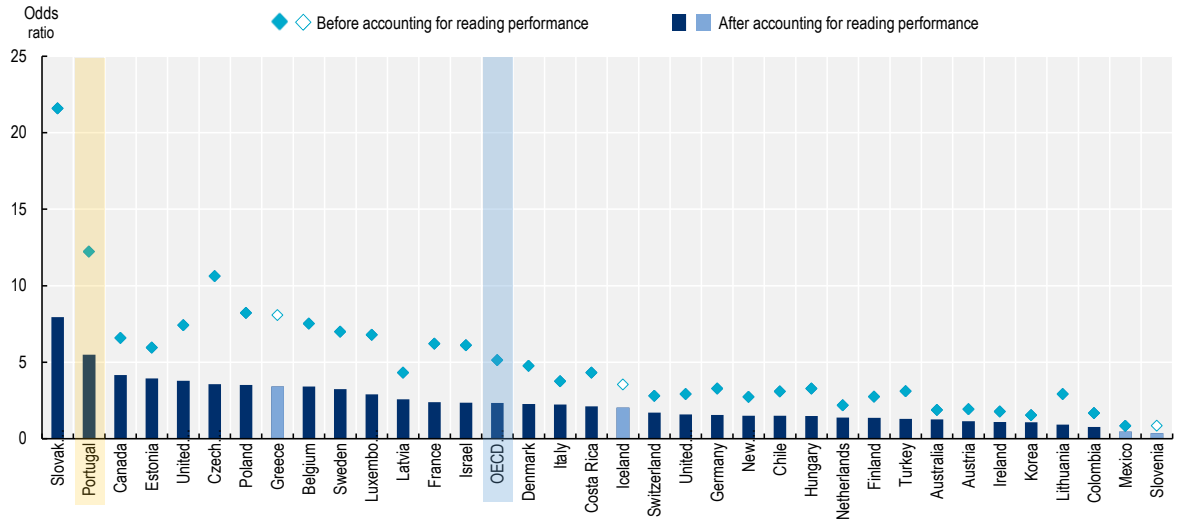
Education level	2017/2018		2018/2019	
	ASE Bracket A	ASE Bracket B	ASE Bracket A	ASE Bracket B
1st cycle	70%	88%	74%	89%
2nd cycle	82%	92%	84%	94%
3rd cycle	21%	34%	21%	38%
Secondary - Humanities-Sciences	26%	32%	30%	38%
Secondary - VET	54%	67%	53%	67%

Source: DGEEC (2021[42]), Resultados Escolares - Indicador de Equidade, Ensino Básico e Secundário – 2019 [*School Results – Equity Indicator, Basic and Secondary Education]*], https://www.dgeec.mec.pt/np4/490/%7B$clientServletPath%7D/?newsId=1233&fileName=Relatorio_IndicadorEquidade.pdf (accessed on 03 September 2021).

Grade repetitions

Data from PISA 2018 (OECD, 2020[14]) show that students from a disadvantaged socio-economic background in Portugal were more than five times as likely to have repeated a grade, compared to students from an advantaged background, which is significantly higher than the OECD average. Even after accounting for reading performance, grade repetition was more likely for students from a disadvantaged background (see Figure 1.20). This could also suggest that factors outside academic performance affect decisions about which students are required to repeat a grade. In terms of school attendance, PISA also shows that 11.1% of disadvantaged students in Portugal (above the OECD average) against 3.7% of advantaged students briefly attend or do not attend pre-primary school (OECD, 2020[14]).

Figure 1.20. Grade repetition, socio-economic status and reading performance (PISA 2018)



Notes: The socio-economic profile is measured by the PISA index of economic, social and cultural status (ESCS).
Statistically significant odds ratios are shown in darker tones.
Countries and economies are ranked in descending order of the increased likelihood of having repeated a grade amongst disadvantaged students, after accounting for reading performance.
Source: OECD (2020[14]), *PISA 2018 Results (Volume V): Effective Policies, Successful Schools*, Table V.B1.2.11, https://doi.org/10.1787/ca768d40-en.

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Socio-economic segregation

Another challenge faced by Portugal is the isolation of students from disadvantaged socio-economic backgrounds. A 2018 DGEEC report on socio-economic asymmetries among 2nd cycle public schools during the 2015/16 school year highlighted significant inequalities between schools (Oliveira Baptista and Pereira, 2018[43]). The district with the most segregation was Lisbon, where some schools had an 8% share of ASE students, while in others, this share reached 78%. In Setúbal, the share of ASE students went from 17% in some schools up to 83% in others. This study also unveiled substantial disparities across districts. For example, while the district of Santarém had the same percentage of ASE students as the district of Lisbon, the average difference between public schools in terms of the share of ASE students was 8.1% in the former and 17% in the latter.

Looking at the isolation index of advantaged students, PISA 2018 shows that Portugal is above the OECD average regarding the isolation of advantaged students, while it is slightly below the OECD average regarding the isolation of disadvantaged students (OECD, 2019[24]). This suggests that socio-economically advantaged students were, on average, less likely to attend the same schools as average or disadvantaged students than disadvantaged students were likely to attend the same school as more advantaged students.

There are also patterns of socio-economic segregation between public and private schools. For example, PISA 2015 showed that among schools enrolling 15-year-old students, schools in the top quartile of socio-economic status are 13 percentage points less likely to be public schools than those in the bottom quartile of socio-economic status (Liebowitz et al., 2018[6]). Further, when examining census data of all Portuguese grade 6 students, Brás de Oliveira (2018[44]) found that 1.3% of students at private independent schools receive ASE, while 45.4% in government-dependent private schools and 53.6% in public schools receive ASE.

The Equity Indicator

Since 2020, DGEEC has developed a new indicator to measure and monitor equity in education across the country. The indicator aims to assess the ability of school clusters and municipalities to promote the school success of disadvantaged students, i.e., ASE students. School success is defined as the completion of each school cycle in the expected time and with positive scores in national examinations.[15] A school or a municipality obtains a high positive value in the equity index if its disadvantaged students achieve higher success in school compared to the national average school success of students of the same socio-economic condition (controlling for ASE bracket, age and mother's educational level). As well as a national report with main trends, DGEEC publishes annually updated data for each school cluster and municipality that are made publicly available and used by the School External Evaluation Programme run by the General Inspectorate (*Inspeção-Geral da Educação e Ciência, IGEC*).

The first systematised results on the equity indicator highlights regional variations (DGEEC, 2021[42]), with the Northern coastal districts of Viana do Castelo, Braga, Porto and Aveiro as well as Vila Real, and the districts of Viseu, Coimbra and Leira in the Centre showing the highest values of educational success for ASE students (i.e. the highest positive values in the equity indicators) in 2019. On the contrary, the districts of Lisbon and Setúbal in the metropolitan region of Lisbon, and those of Beja and Portalegre in Alentejo had the worst results on the equity index (lowest negative values). The districts of Lisbon and Setúbal showed a negative equity index at all cycles of education. This means that disadvantaged students within schools and municipalities in these districts are the least likely to complete each school cycle in the expected time and with high scores in the national examinations. When looking at the municipalities with the highest numbers of enrolled students, Lisbon, Sintra, Almada and Porto have the lowest equity index, with negative values at all cycles, except in the first cycle in Sintra (see Annex 1.C). In spite of these significant variations between districts and municipalities, according to the equity indicator, equity improved in nearly all districts between the 2017/2018 and 2018/2019 school years (DGEEC, 2021[42]).

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Annex 1.A. Foreign students enrolled in primary and secondary education in Portugal Mainland (2017/2018 and 2018/2019 school years)

Nationalities	2018/2019		2019/2020		Variation rate between school years
	N	%	N	%	
European Union	**6 475**	**12.3**	**7 354**	**10.8**	**+13.6**
Romania	1 962	3.7	1 873	2.8	- 4.5
France	805	1.5	1 088	1.6	+35.2
United Kingdom	757	1.4	930	1.4	+22.9
Spain	794	1.5	868	1.3	+9.3
Italy	523	1.0	743	1.1	+42.1
Germany	387	0.7	452	0.7	+16.8
Bulgaria	404	0.8	359	0.5	-11.1
Netherlands	281	0.5	318	0.5	+13.2
Other European Union countries	562	1.1	723	1.1	+28.6
Eastern Europe	**3 609**	**6.9**	**3 889**	**5.7**	**+7.8**
Ukraine	2 370	4.5	2 487	3.7	+4.9
Moldova	844	1.6	921	1.4	+9.1
Russian Federation	286	0.5	360	0.5	+25.9
Other Eastern European countries	109	0.2	109	0.2	+11.0
Other European countries	**361**	**0.7**	**582**	**0.9**	**+61.2**
Africa	**13 723**	**26.1**	**16 722**	**24.6**	**+21.9**
Angola	4 446	8.4	6 239	9.2	+40.3
Cape Verde	3 781	7.2	4 137	6.1	+9.4
Guinea-Bissau	2 593	4.9	2 989	4.4	+15.3
Sao Tome and Principe	1 689	3.2	1 862	2.7	+10.2
Mozambique	412	0.8	523	0.8	+26.9
Other African countries	802	1.5	972	1.4	+21.2
South America	**23 730**	**45.1**	**33 384**	**49.1**	**+40.7**
Brazil	22 687	43.1	31 824	46.8	+40.3
Venezuela	803	1.5	1 263	1.9	+57.3
Others South American countries	240	0.5	297	0.4	+23.8
North America	**302**	**0.6**	**393**	**0.6**	**+30.1**
United States	225	0.4	282	0.4	+25.3
Other North American countries	77	0.1	111	0.2	+44.2
Other American countries	**142**	**0.3**	**167**	**0.2**	**+17.6**

Asia	**4 265**	**8.1**	**5 499**	**8.1**	**+28.9**
China	1 443	2.7	1 490	2.2	+3.3
Nepal	802	1.5	1 192	1.8	+48.6
India	726	1.4	1 108	1.6	+52.6
Pakistan	411	0.8	521	0.8	+26.8
Bangladesh	214	0.4	358	0.5	+67.3
Other Asian Countries	669	1.7	830	1.2	+24.1
Oceania	**34**	**0.1**	**27**	**0.0**	**-20.6**
Total	**52 641**	**100**	**68 018**	**100**	**+29.2**

Source: Oliveira, C. R. (2021[22]), *Indicadores de integração de imigrantes: relatório estatístico annual 2021 [Immigrant integration indicators: 2021 annual statistics report]*, ACM, Lisbon, Table 5.2., p.101, https://www.om.acm.gov.pt/documents/58428/383402/Relat%C3%B3rio+Estat%C3%ADstico+Anual+2021.pdf/e4dd5643-f282-4cc8-8be1-92aa499bb92f (accessed on 18 January 2022).

Annex 1.B. Transition/conclusion rates of foreign students by nationality in basic and secondary education in Portugal Mainland

Nationalities	Transition rate 2017/2018 (%)	Transition rate 2018/2019 (%)	Transition rate 2019/2020 (%)	Difference with foreign students' average 2019/2020 (percent point)	Difference with Portuguese students' average 2019/2020 (percent point)
European Union	**86.7**	**88.6**	**92.2**	**+3.7**	**-4.0**
Italy	81.6	89.9	92.9	+4.4	-3.3
France	87.0	89.8	94.2	+5.7	-2.0
Germany	85.4	89.4	93.1	+4.6	-3.1
Romania	87.6	89.3	90.9	+2.4	-5.3
Netherlands	88.3	89.0	91.8	+3.3	-4.4
Spain	87.9	88.0	92.7	+4.2	-3.5
Bulgaria	83.8	83.9	88.9	+0.4	-7.3
Other European Union countries	39.5	87.9	92.0	+3.5	-4.2
United Kingdom	86.4	87.6	93.0	+4.5	-3.2
Eastern Europe	**89.6**	**91.6**	**94.4**	**+5.9**	**-1.8**
Moldova	91.5	91.8	94.9	+6.4	-1.3
Russian Federation	91.6	91.6	95.0	+6.5	-1.2
Ukraine	89.2	91.5	94.0	+5.5	-2.2
Other Eastern European countries	86.6	91.7	95.9	+8.7	-2.0
Other European countries	**87.5**	**91.1**	**95.9**	**+7.4**	**-0.3**
Africa	**76.5**	**80.0**	**86.3**	**-2.2**	**-9.9**
Mozambique	81.1	83.7	86.8	-1.7	-9.4
Cape Verde	76.9	81.6	86.3	-2.2	-9.9
Sao Tome and Principe	78.7	80.8	87.7	-0.8	-8.5
Angola	75.7	78.5	86.3	-2.2	-9.9
Guinea-Bissau	74.9	78.4	86.1	-2.4	-10.1
Other African countries	75.9	81.8	84.4	-4.1	-11.8
South America	**79.6**	**82.3**	**89.0**	**+0.5**	**-7.2**
Venezuela	86.7	89.4	93.2	+4.7	-3.0
Brazil	79.3	82.1	88.9	+0.4	-7.3

Other South American countries	81.6	85.4	87.5	-1.0	-8.7
North America	**88.4**	**83.8**	**91.0**	**+2.6**	**-5.1**
United States	85.3	84.9	95.7	+2.6	-5.1
Other North American countries	97.3	80.5	79.3	-9.2	-16.9
Other American countries	**83.5**	**88.7**	**92.8**	**+4.3**	**-3.4**
Asia	**77.4**	**80.1**	**82.1**	**-6.4**	**-14.1**
China	89.0	90.9	92.8	+4.3	-3.4
Nepal	67.1	74.2	75.9	-12.6	-20.3
Pakistan	69.0	70.1	75.8	-12.7	-20.4
India	66.2	67.4	77.1	-11.4	-19.1
Other Asian countries	78.7	83.1	86.4	-2.1	-9.8
Oceania	**87.9**	**88.2**	**88.9**	**+0.4**	**-7.3**
Total foreign students	**80.6**	**83.0**	**88.5**	**0**	**-7.7**
Portuguese students	**92.3**	**93.7**	**96.2**	**+7.7**	**0**

Note: The conclusion/transition rate (*taxa de transição/conclusão*) is an indicator that measures the percentage relation between the number of students who, at the end of a school year, obtain approval to transit to the following school year and the number of enrolled students on the corresponding school year. It is different from the "Conclusion rate" (*taxa de conclusão*) indicator, which is used to measure to the number of students who obtain approval in the last year of a school level, i.e. in the 9th grade or 12th grade (DGEEC, 2020[11]).

Sources: Adaptated from Oliveira, C. R (Oliveira, 2020[23]), *Indicadores de integração de imigrantes: relatório estatístico annual 2021 [Immigrant integration indicators: 2021 annual statistics report]*, ACM, Lisbon Table 5.5., p.119, https://www.om.acm.gov.pt/documents/58428/383402/Relat%C3%B3rio+Estat%C3%ADstico+Anual+2020++Indicadores+de+Integra%C3%A7%C3%A3o+de+Imigrantes/472e60e5-bfff-40ee-b104-5e364f4d6a63 (accessed on 2 September 2021); and Oliveira, C. R. (2021[22]), *Indicadores de integração de imigrantes: relatório estatístico annual 2021 [Immigrant integration indicators: 2021 annual statistics report]*, ACM, Lisbon, Table 5.5., p.105, https://www.om.acm.gov.pt/documents/58428/383402/Relat%C3%B3rio+Estat%C3%ADstico+Anual+2021.pdf/e4dd5643-f282-4cc8-8be1-92aa499bb92f (accessed on 18 January 2022).

Annex 1.C. Equity indicator in the largest Portuguese municipalities by education cycles

Level of schooling	Council	% PDS/CTN among ASE student	% PDS/CTN - national average ASE students	Equity Indicator
1st cycle	Lisbon	72.0%	76.2%	-4.2%
	Sintra	80.5%	80.1%	0.4%
	Vila Nova de Gaia	84.5%	83.4%	1.2%
	Porto	74.2%	77.5%	-3.4%
	Cascais	80.5%	79.1%	1.4%
	Loures	66.3%	78.1%	-11.9%
	Braga	86.6%	81.7%	4.9%
	Almada	75.7%	77.0%	-1.3%
	Oeiras	83.5%	79.6%	3.9%
	Seixal	77,9%	79.6%	-1.7%
	Amadora	68.6%	75.3%	-6.8%
	Matosinhos	83.6%	79.5%	4.2%
	Odivelas	76.8%	80.0%	-3.2%
	Vila Franca de Xira	80.7%	80.3%	0.3%
	Gondomar	81.7%	80.1%	1.6%
2nd cycle	Lisbon	76.8%	85.1%	-8.3%
	Sintra	84.9%	88.4%	-3.6%
	Vila Nova de Gaia	86.8%	88.3%	-1.5%
	Porto	86.7%	86.3%	0.3%
	Cascais	88.5%	88.3%	0.2%
	Braga	92.8%	89.7%	3.1%
	Almada	83.6%	86.0%	-2.4%
	Loures	78.9%	85.1%	-6.1%
	Oeiras	88.8%	89.7%	-0.8%
	Amadora	70.9%	84.1%	-13.3%
	Seixal	82.9%	87.3%	-4.4%
	Matosinhos	90.2%	88.2%	2.0%
	Odivelas	81.9%	87.8%	-5.9%
	Guimarães	96.1%	90.7%	5.4%
	Setúbal	76.7%	85.0%	-8.3%
3rd cycle	Lisbon	15.7%	24.2%	-8.5%
	Sintra	19.5%	27.8%	-8.3%
	Vila Nova de Gaia	26.3%	26.8%	-0.6%
	Porto	16.8%	26.1%	-9.3%
	Cascais	26.3%	27.2%	-0.9%
	Braga	34.8%	30.9%	3.9%
	Loures	16.6%	23.0%	-6.4%
	Almada	20.5%	23.2%	-2.7%
	Oeiras	29.3%	30.6%	-1.3%
	Seixal	19.8%	25.2%	-5.4%
	Matosinhos	26.3%	27.2%	-0.9%
	Guimarães	43.2%	33.5%	9.7%
	Maia	27.5%	28.9%	-1.4%

	Odivelas	21.6%	26.5%	-4.9%
	Vila Nova de Famalicão	36.4%	32.8%	3.6%
Secondary Sciences-Humanities	Lisbon	24.1%	28.6%	-4.6%
	Porto	27.2%	31.6%	-4.4%
	Sintra	23.3%	29.2%	-5.9%
	Braga	38.7%	39.0%	-0.3%
	Cascais	29.1%	30.7%	-1.6%
	Oeiras	28.1%	31.3%	-3.3%
	Vila Nova de Gaia	30.5%	30.9%	-0.4%
	Almada	25.5%	28.6%	-3.1%
	Coimbra	34.6%	36.6%	-1.9%
	Guimarães	45.2%	40.3%	4.9%
	Gondomar	23.9%	30.9%	-7.0%
	Seixal	21.9%	28.7%	-6.8%
	Matosinhos	35.8%	33.7%	2.1%
	Odivelas	23.4%	27.3%	-3.9%
	Loures	26.7%	29.3%	-2.6%
Secondary VET	Lisbon	40.1%	54.2%	-14.1%
	Porto	48.6%	54.4%	-5.8%
	Vila Nova de Famalicão	74.1%	63.5%	10.6%
	Sintra	53.4%	60.4%	-7.0%
	Vila Nova de Gaia	60.2%	61.4%	-1.2%
	Braga	61.7%	64.0%	-2.3%
	Guimarães	76.4%	65.5%	10.9%
	Almada	41.0%	51.6%	-10.5%
	Coimbra	45.9%	52.0%	-6.1%
	Amadora	26.8%	49.7%	-22.9%
	Torres Vedras	83.3%	65.4%	18.0%
	Barcelos	86.6%	68.7%	17.9%
	Santo Tirso	86.6%	57.3%	29.2%
	Matosinhos	76.9%	55.9%	21.0%
	Cascais	44.2%	48.1%	-3.9%

Note: The measurement school success is based on two indicators, which are used to calculate the equity indicator. The first one is the "conclusion within the expected time" (*conclusão no tempo esperado*, CTN, for the 1st, 2nd cycle of basic education) and the second is the "direct success path" (*precursos diretos de sucesso*, PDC, for the 3rd cycle of basic education and sciences-humanities of secondary education). The CTN indicator estimates how many of students who finish a cycle within the expect time. The PDC indicator, based on the CTN indicator and student's results on national exams, estimates how many students concluded a cycle within the expected time and obtained positive results at on national exams.

Source: DGEEC (2021[42]), Resultados Escolares - Indicador de Equidade, Ensino Básico e Secundário – 2019 [*School Results – Equity Indicator, Basic and Secondary Education*], https://www.dgeec.mec.pt/np4/490/%7B$clientServletPath%7D/?newsId=1233&fileName=Relatorio_IndicadorEquidade.pdf (accessed on 03 September 2021).

Notes

[1] See: https://dre.pt/pesquisa/-/search/488826/details/maximized (accessed on 25 August 2021).

[2] For further information of the different strands, see the website of the Directorate-General for Education (*Direção-Geral da Educação*, DGE): http://www.dge.mec.pt/cursos-cientifico-humanisticos (accessed on 25 August 2021).

[3] An early leaver from education and training, previously named early school leaver, refers to a person aged 18 to 24 who has completed at most lower secondary education and is not involved in further education or training; the indicator "early leavers from education and training" is expressed as a percentage of the people aged 18 to 24 who meet this criteria out of the total population aged 18 to 24.

[4] In Portugal, the "grade repetition and dropout rate" (*taxa de retenção e desistência*) corresponds to the percentage of students who, at the end of a given school year, could not transit to the next school year.

[5] De Almeida et al. (2021) explain that the significant decline in the number of foreigners living in Portugal was primarily due to two factors: the economic crisis and the acquisition of the Portuguese nationality by a high number of people with an immigrant background already residing in the country. During these years, Portugal had more emigration than immigration, with the revival of traditional destinations such as Switzerland, Luxembourg and Germany and the emergence of new ones such as the United Kingdom, Spain and Angola.

[6] In Portugal, data on people with an immigrant background are mainly collected based on nationality. As such, a non-negligible share of people with an immigrant background, when they acquire the Portuguese nationality, are invisible in these statistics. In education, data mainly come from administrative data provided by public schools using a questionnaire sent by DGEEC. In this questionnaire, schools can give information on the country of birth of students and parents. In private schools, DGEEC sends a questionnaire with similar questions, but there is no information about parental birth country in these questionnaires.

[7] Because data collected by Portugal are based on nationality, they use the notion of foreigners (*estrangeiros*) to describe non-Portuguese. To describe these individuals, the OECD Strength through Diversity project uses the term "people with an immigrant background", which, however, encompasses broader characteristics than nationality. Therefore, in this report, "foreign students" refer to students enrolled in the Portuguese education system who do not have Portuguese nationality. The category "Students with an immigrant background" encompasses students who do not have Portuguese nationality as well as students who are Portuguese and immigrated to Portugal and/or have parents (2nd generation), or grand-parents (3rd generation) etc. who immigrated to Portugal.

[8] According to Oliveira (2021[22]), this decrease was mainly due to a decrease of the overall foreign population and to a significant number of immigrants born in Portugal obtaining the nationality and disappearing from official statistics.

[9] The PISA 2018 index of attitudes towards immigrants was derived from responses to the following statements: “Immigrant children should have the same opportunities for education that other children in the country have”; “Immigrants who live in a country for several years should have the opportunity to vote in elections”; “Immigrants should have the opportunity to continue their own customs and lifestyle”; and “Immigrants should have all the same rights that everyone else in the country has”. Responses were provided on a four-point scale: “strongly disagree”, “disagree”, “agree”, and “strongly agree”.

[10] See: https://www.acm.gov.pt/documents/10181/52642/Publicac%CC%A7a%CC%83o+ENICC_EN_bx.pdf/c129278c-86bc-4647-88e7-f362a61c56f1 (accessed on 13 December 2021).

[11] While this study gives an idea of the repartition of Roma communities in Portugal Mainland, results have to be interpreted with caution since slightly less than half of the Portuguese municipalities participated.

[12] People living in households with very low work intensity are defined as people of all ages (0-59) living in households where the household members of working age (18-59) worked less than 20% of their total potential, based on the current activity status.

[13] See: https://www.dgeec.mec.pt/np4/97/ (accessed on 25 August 2021).

[14] See: https://www.dgeec.mec.pt/np4/224/ (accessed on 13 December 2021)

[15] Portugal only has national examinations in 9th grade of basic education (Portuguese and mathematics) and in 11th and 12th grades of upper secondary education.

2 Governing and financing inclusive education

This chapter is about the governance and resourcing of inclusive education in Portugal. It analyses the country's educational goals for diversity, equity and inclusion; the curriculum; the regulatory framework; the responsibilities and administration and the resourcing of inclusive education. Portugal started focusing on inclusion in education in the 1970s. It has developed one of the most comprehensive legal frameworks for inclusive education. The country has made significant efforts to respond to the needs of all students and grant more flexibility and autonomy to local actors. Many programmes and resources are now available to support equity and inclusion. However, challenges remain regarding the management of these resources and the administration of inclusive education. Also, the system is still mainly orientated towards the inclusion of students with special education needs. The chapter provides recommendations to overcome these challenges and strengthen the governance and resourcing of inclusive education.

Context and features

Educational goals for diversity, equity and inclusion

Portugal has a specific history of inclusive education policies that has led to its current educational priorities. After the 1974 revolution, based on previous small and local experiments, more intensive efforts to integrate students with special education needs (SEN) in mainstream schools started in Portugal (Nogueira and Rodrigues, 2010[1]). In 1979, the national policy already stated that students with special education needs should, as far as possible, attend mainstream schools and that these schools should progressively readjust their structures to respond to these students' needs (Alves, 2019[2]).

In parallel to the emergence of integration policies, parents and specialised staff created various private special education schools. About 100 of these institutions, called Education and Rehabilitation Cooperatives for Citizens with Disabilities (*Cooperativa Educação e Reabilitação de Cidadãos com Incapacidades,* CERCI), were formed, specifically dedicated to supporting and educating students with SEN in separate settings (Nogueira and Rodrigues, 2010[1]). Decree Law No. 319/1991[1] then established the right of children with SEN to attend mainstream schools. While inclusion emerged as an important orientation relatively early in Portugal, the inclusive education terminology was only adopted after the 1994 Salamanca Conference, which established the principle of inclusive education. However, inclusion was not fully integrated into school culture and remained mainly understood as the inclusion of students with SEN.

In 2008, there were approximately 10 000 students in 93 private special education schools. Within the logic that an inclusive system should, as much as possible, avoid separate provisions and equip mainstream schools to respond to diversity, the Ministry of Education (MoE) in Portugal started a dialogue with these special private schools. The MoE suggested that students and staff should be placed in mainstream schools, which should be supported in promoting the inclusion of these students. This consultation led to the elaboration of Decree Law No. 3/2008, 7 January, which defined the specialised support to implement in pre-school, basic and secondary education for the inclusion of students with SEN in mainstream schools. An agreement was made ensuring these separate private schools received funding from the MoE to intervene in public schools (Ministry of Education, 2022[3]). Most of these institutions thus became Resource Centres for Inclusion (*Centros de Recursos para a Inclusão,* CRIs).

While inclusion has been an important part of Portugal's education agenda since even before the 1990s, the focus largely remained until recently, almost exclusively students with SEN. However, over the last years, in particular, in the last three years, there have been major changes in education policy in Portugal. As in many OECD countries, trends such as an increase in the share of the population with an immigrant background and a shift towards accommodating diversity (Cerna et al., 2021[4]) have led to a greater recognition of diversity in Portuguese schools. There has been, for example, a steady increase in the share of students with an immigrant background and of identified students with SEN across regions in Portugal (see Chapter 1). Also, in PISA 2018 (OECD, 2020, p. 24[5]), nearly 55% of students responded that they have contact with people from other countries in schools, placing Portugal slightly above the OECD average. In this context, measures to promote students' inclusion into the education system through access to the curriculum, educational success and ensuring their sense of belonging and self-worth have become core priorities.

The 22nd Constitutional Government's programme promotes an education policy that focuses on people, guaranteeing equity and quality. In particular, it states that "the public school is the main instrument to reduce social mobility inequalities. As such, schools must guarantee equality of opportunity in accessing a quality and inclusive education".[2]

In line with these principles, policies and laws adopted at the national level have been increasingly orientated towards the inclusive education model, adopting inclusion in a broad sense as a cornerstone of

educational policy and a key responsibility of the education system. Equity and inclusion principles inform national policy measures within the education system, particularly those that deal with the curriculum, assessment, school evaluation, continuing teacher professional learning and budgets.

Recent legislation on inclusive education requires the provision of support for all students to be determined, managed and provided within mainstream school settings. For example, local multidisciplinary teams to support inclusive education (*Equipas multidisciplinares de Apoio à Educação Inclusiva*, EMAEI, see Chapter 4) are formed within schools to support inclusion. They are responsible for determining what support is necessary to ensure that all students (regardless of socio-economic, cultural, linguistic, ethnic backgrounds and ability) have access and the means to participate effectively in education and be fully included in society. Furthermore, various national action plans and programmes support all students, especially those from diverse groups who are particularly vulnerable and at risk of dropout, such as students with special education needs, students from ethnic minorities (in particular, Roma communities) and students with an immigrant background.

Measures within the education system are designed and implemented at all levels - national, regional and local - so that all students have access to good learning conditions. The system promotes inclusion for all and the creation of a system-wide culture of inclusion that requires a shared commitment amongst staff at the national, local and school levels.

There has been an increasing trend towards local autonomy, which has been accompanied by new governance and accountability mechanisms. Ongoing reforms are leading to a growing intervention of municipalities in the field of education. There is a common assumption that there is not one single model of an inclusive school. Therefore, within the recent political orientation developed at the system level, schools have been granted more autonomy. Autonomy and curriculum flexibility, together with inclusion, are key concepts and principles in the design and implementation of curricula and educational activities. Significant effort is being made regarding personalisation, which involves giving individual attention to students and closely working with them. A strong development-orientated political commitment currently exists, which aims to reduce educational inequities and promote quality education and learning for all. There is also the possibility for schools to have up to 25% autonomy in managing the curriculum to respond to the needs and characteristics of their students and local context.

Curriculum reference documents and other essential documents developed at the central level, such as The Students' Profile by the End of Compulsory Schooling and Essential Learning described below, guarantee coherence within the education system. They guarantee the inclusive function of the school and guide them through a set of principles, values and vision, resulting from social consensus.

Curriculum

Since 2017, the MoE of Portugal has adopted a set of new documents that constitute the framework for the design and implementation of a 21st century curriculum. The national curriculum for primary and secondary education has changed according to three major guiding central documents: (1) the Students' Profile by the End of Compulsory Schooling (2017); (2) the National Strategy for Citizenship Education (2017); and (3) a set of documents, called the Essential Learning.

The Students' Profile by the End of Compulsory Schooling (Students' Profile)

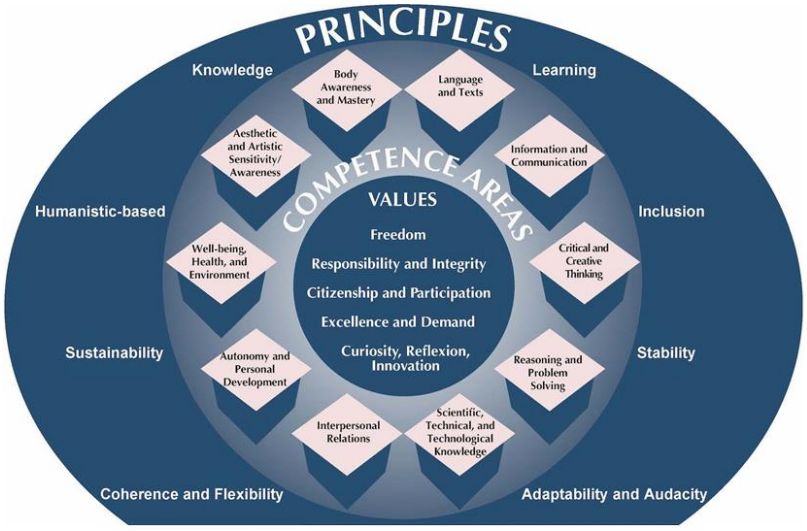
The Students' Profile (*Perfil dos Alunos à Saída da Escolaridade Obrigatória*, Legislative Order No. 6478/2017, 26th June) is a reference guide for the whole curriculum, setting out the principles, vision and competence areas (academic, social and emotional competences) that students should have attained by the time they complete compulsory schooling. It is the matrix for decisions to be taken by educational managers and actors at the level of the bodies responsible for educational policies and schools. The purpose is to contribute to the organisation and management of the curriculum and to the definition of

strategies, methodologies, and pedagogical-didactic procedures to be used in learning and teaching practices. It is the matrix for decisions to be used by educational stakeholders at all levels of the education system.

This document is the framework for curriculum development and the organisation of school activities. The broadness of the Students' Profile respects the inclusive and multiple character of the school, ensuring that, regardless of the school pathways, all knowledge is guided by explicit principles, values and vision, resulting from social consensus (Ministry of Education, 2022[3]).

The principles and values outlined in the Students' Profile's conceptual framework (see Figure 2.1) mirror the humanistic-based philosophy on which the whole document is based. By referring to students in the plural form, it fosters inclusion and values diversity viewing each student as a unique human being. Therefore, the Students' Profile leads to a school education on which the students of this global generation can build a humanistic-based scientific and artistic culture. It aims to help students: (1) mobilise values and skills that allow them to act upon the life and history of individuals and societies; (2) make free and informed decisions about environmental, social and ethical issues; and (3) carry out civic, active, conscious and responsible participation (d'Oliveira and al., 2017[6]).

Figure 2.1. Conceptual Framework for the Students' Profile by the End of Compulsory Schooling



Source: DGE (2022[7]), P*erfil dos Alunos [Students' Profile]*, https://www.dge.mec.pt/perfil-dos-alunos (accessed on 17 March 2022).

National Strategy for Citizenship Education (ENEC)

The 2017 National Strategy for Citizenship Education (*Estratégia Nacional da Educação para a Cidadania,* ENEC[3]) was created to support children and young people to acquire citizenship skills, knowledge and values throughout compulsory education. The Strategy was developed in accordance with the Students' Profile. In line with the ENEC, the national curriculum includes the Citizenship and Development subject, which promotes and reflects on the principles of diversity, equity and inclusion and encourages interdisciplinary activities.

This strategy aims to help students develop and participate actively in projects that promote fairer and more inclusive societies within the context of democracy and democratic institutions, the respect and defence of human rights, and respect for diversity and gender equality, environmental sustainability and health education. Enshrined in the 1986 Basic Law of the Education System (Law No. 46/86) and the *Students' Profile*, the inclusion of this area in the curriculum recognises the school's responsibility to provide adequate preparation for active and informed citizenship, as well as appropriate education to achieve the *Sustainable Development Goals*[4].

The Essential Learning

In 2018, based on these two reference documents, the MoE developed the Essential Learning (*Aprendizagens Essenciais,* AE, established by Legislative Orders No. 6944-A/2018, of 19th July and No. 8476-A/2018, of 31st August). The AE are curricular orientation documents that describe the bases for the planning, realisation and assessment of each school subject for each year of schooling[5] to Vocational Courses and Artistic Specialised Courses (Legislative Orders No. 7414/2020, of 24th July and No. 7415/2020, of 24th July). The AE were developed in consultation with teacher associations. When there was no professional teacher association constituted, this was undertaken by scientific societies and authors, allowing for the development of meaningful learning standards. The AE also facilitate interdisciplinary work, various assessment procedures and tools, the promotion of research, comparison and analysis skills, the mastery of presentation and argumentation techniques and the ability to work cooperatively and independently (Ministry of Education, 2022[3]).

School autonomy and curriculum flexibility

It is critical that schools and teachers make the main decisions at curricular and pedagogical levels, for instance by having greater flexibility in curriculum management, aiming to foster interdisciplinary work, in order to deepen, strengthen and enrich the Essential Learning by subject and year of schooling. As such, within Decree Law No. 55/2018, 6 July, schools are provided with up to 25% of curriculum autonomy in order to meet their specific needs by fostering pedagogical differentiation in the classroom, interdisciplinary work and project-based methodologies; creating new subjects; and allowing upper secondary students to choose their own course format by being able to swap and replace subjects within the scientific component of each course, among other measures.

In the scope of the School Autonomy and Curriculum Flexibility the MoE issued Ordinance No. 181/2019, of 11th June, which allows public and private schools, according to their autonomy and flexibility, to manage more than 25% of the curriculum by designing innovation plans. This Ordinance aims at facilitating the implementation of curricular and organisational innovation school plans based on the need to implement appropriate responses to curriculum and pedagogy to meet each educational community's challenges and improve the quality of learning, the focus on meeting diverse learners' needs and, ultimately, the success of all. Each innovation plan must be proposed and presented by each school and requires validation by the MoE.

Curricular accommodations

Students can benefit from curricular accommodations which aim to facilitate their access to the curriculum. Portugal implemented various tools to respond to the needs of students at risk of school failure and those from disadvantaged and diverse backgrounds who encounter difficulties in their learning. These tools are to be implemented in the classroom through diverse strategies, including the diversification and appropriate combination of various teaching methods and strategies, diversified and inclusive assessment strategies and the removal of barriers in the organisation of space and equipment. In other words, curriculum adaptation strategies are designed to respond to the different learning styles of every student and promote

their educational success (Ministry of Education, 2022[3]). The main curricular adaptation programmes and strategies are the following:

Education and Training Courses (CEF)

The Education and Training Courses (*Cursos de Educação e Formação* - CEF) were first implemented during the school year 2004/2005. They aim at supporting young people who:

- Are at risk of early school leaving.
- Left school before completing 12 years of schooling.
- Are interested in obtaining a professional qualification before entering the labour market.

CEFs are mainly aimed at young people aged 15 or over but are also offered to students under 15 in exceptional circumstances. The courses have a specific curriculum design, tailored to the profile and individual features of each student. They provide academic and/or professional certification at different levels, depending on the student's starting point.

Education and Training Integrated Programme (PIEF)

Created in 1999, the Education and Training Integrated Programme (PIEF)[6] is an exceptional measure for students up to 15 years old in a situation of abandonment that has been redesigned over the years. The PIEF is a socio-educational measure, of a temporary and exceptional nature, to be adopted after all other school integration measures have been exhausted. It aims to promote the fulfilment of compulsory education and social inclusion, granting a qualification in a second or third school cycle. The programme aims to reintegrate students into education and promote the completion of compulsory education and/or integration into the labour market. Each student is specifically targeted through the development of an Individual Education and Training Plan. It differs from Education and Training Courses (CEF) in that it does not confer double academic and professional certification. The two also differ in terms of curriculum and study scope. The main objective of PIEF is to recover students who have left the education system early.

Distance learning (ED)

Drawing on a previous educational provision entitled Mobile School (*Escola Móvel*) in 2005, distance learning (*Ensino a Distância*, ED)[7] formally became an official educational provision in 2014 through Ministerial Implementing Order no. 85/2014, of the 14th April, which was repealed by the Ministerial Implementing Order no. 359/2019, on the 8th October. Distance learning aims to adapt an educational and training offer to students for whom face-to-face teaching is not possible. A virtual education platform was put in place for:

- Children of travelling professionals.
- Student-athletes attending distance learning in the network of schools with High Performance Support Units at School.
- Students integrated in social solidarity institutions that establish cooperation agreements with the ED school.
- Students with health problems or physical conditions that limit their regular attendance at school.
- Other specific cases.

The ED aims to ensure equal access to education, stable educational paths, quality learning, and students' educational success in the above circumstances. It is offered from the second cycle of primary education until the end of secondary education. It provides an organisational, curricular, pedagogical and learning structure suitable for this type of teaching, functioning on a b-learning model.[8] Both b-learning and

e-learning models are used in distance learning. However, students have to attend some face-to-face lessons, namely Physical Education. Students usually attend these lessons in a nearby school.

Alternative Curricular Pathways (PCAs)

Alternative Curricular Pathways (*Percursos Curriculares Alternativos*, PCAs)[9] were implemented in 2006. They are specific educational provisions for exceptional circumstances, which require prior authorisation from the MoE. These pathways target students who have repeated years in the same cycle and are at risk of early school leaving, or experience school or social exclusion. PCAs are adapted to the profile and specific needs of each student. They are part of a re-orientation strategy and aim at facilitating inclusion into mainstream education.

Currently, PCAs are integrated into innovation plans established by Ordinance No. 181/2019, of the 11th June, altered by Ordinance No. 306/2021, of 17th December. Within the scope of their curricular autonomy and the principles that underpin innovation plans, a school can design PCAs if: (1) it identifies a group of students from the same year of schooling who require specific and temporary management of the basic curricular matrix; and (2) none of the existing educational and training offers proves to be adequate. These innovation plans, of which PCAs are part, are submitted to the MoE for analysis and approval.

Portuguese as a Second Language (PLNM)

Some measures have been implemented to respond to these challenges to improve access and inclusion of newly arrived students with an immigrant background and, more recently, of refugee students (see Box 2.1), in primary and secondary education. Data from PISA 2018 show that in Portugal, 33.2% of first-generation and 23.5% of second-generation students with an immigrant background do not speak the language of instruction at home. Evidence shows that students who do not speak the language of instruction at home might face significant challenges in accessing the curriculum and feeling that they belong (OECD, 2019[8]; European Commission/EACEA/Eurydice, 2019[9]).

To promote the inclusion of students with an immigrant background who recently arrived in the Portuguese educational system, the MoE implemented measures to support the acquisition of the Portuguese language. These students are offered the school subject Portuguese as a second language (PL2 or *Português Língua Não Materna,* PLNM), in primary and secondary education (ISCED 1, 2 and 3). The objective is to ensure that all students who are non-native Portuguese speakers are offered equal conditions to access the school curriculum and achieve educational success. The idea that schools "must provide specific curricular activities for students whose language is not Portuguese to learn Portuguese as a second language" first emerged in 2001 with Decree Law No. 6/2001, 18 January. The PNLM subject was created a few years later, in 2006 (Ordinance No. 7/2006) in basic schools and in 2007 (Ordinance No. 30/2007) in secondary schools. It was strengthened with Decree Law No. 139/2012 that requires PNLM to be a mandatory part of the curriculum (Oliveira, 2021[10]).

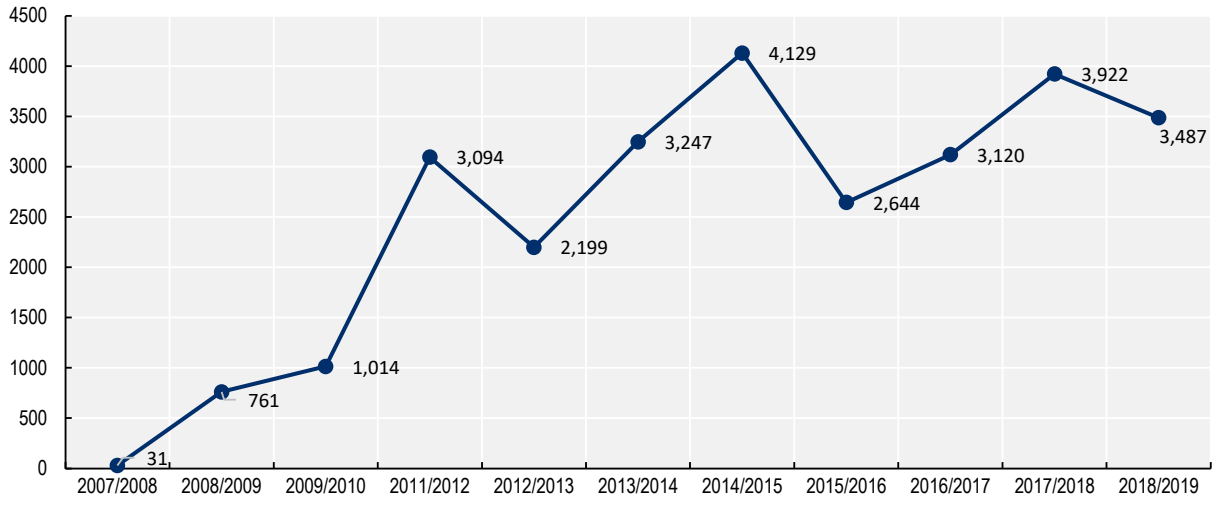
The PL2 offer is taught in ISCED 1 and 2 (primary and lower secondary education - year 1 to year 9) in most education and training courses, including sciences - humanities courses and specialised artistic courses in ISCED 3 (upper secondary education – year 10 to year 12) as well as professional courses with dual certification at the secondary level[10].

All public primary and secondary schools in the Portuguese educational system offer these measures. Based on language assessment through interviews and placement tests, students are placed depending on their language level (A1, A2 or B1, according to the Common European Framework of Reference for Languages, CEFR). They can benefit from PLNM classes for the development of the Portuguese language and follow a specific PL2 curriculum. Immigrant students with a B2 or C1 level follow the Portuguese subject as described in the national curriculum and can benefit from additional language support classes. Furthermore, students placed at the A1, A2 and B1 language levels can also benefit from specific

assessment criteria in the PLNM subject, as well as final exams of PLNM, which correspond to their language level instead of the regular final exams of the Portuguese subject.

During the 2018/2019 school year, there were 3 487 students attending PNLM classes, fewer than in 2017/2018 (3 922) although 1.3 times more than in 2015/2016 (2 644) (Figure 2.2). In 2018/2019, 86.6% of PLNM students were enrolled in basic education, and 17.4% of them were in secondary education. Moreover, the same year, 48% were girls, and 52% were boys (Oliveira, 2021[10]).

Figure 2.2. Students enrolled in PLNM classes in public schools, Continental Portugal (2007/2008 - 2018/2019)



Source: Oliveira (2021[10]), *Indicadores de integração de imigrantes: relatório estatístico annual 2021 [Immigrant integration indicators: 2021 annual statistics report], ACM (High Commissioner for Migrations), Lisbon, Figure 6.6, p.130, https://www.om.acm.gov.pt/documents/58428/383402/Relat%C3%B3rio+Estat%C3%ADstico+Anual+2021.pdf/e4dd5643-f282-4cc8-8be1-92aa499bb92f* .(accessed on 19 January 2022).

StatLink https://stat.link/uv3t5b

Also, within the scope of the Decree Law No. 54/2018, other specific educational measures, such as universal, selective and/or additional measures can be applied by each school to support immigrant students placed at level A1 to ensure their access to the curriculum and inclusion.

Box 2.1. Extraordinary educational measures for foreign non-accompanied minors

Since the 2015/16 school year, the MoE has developed a set of extraordinary educational measures for foreign non-accompanied minors (*menores estrangeiros não acompanhados*, MENA). These measures aim to welcome refugee or asylum seeker non-accompanied students by supporting progressive access to the national curriculum and ensuring their educational success. It reinforces support for PLNM classes and provides specific educational measures. These include simplifying the process of academic degree recognition, progressive integration in the curriculum (through the adaptation of the school calendar and separate small group classes to reinforce learning) and School Social Assistance (*Ação Social Escolar*, ASE). In 2020, the Directorate-General for Education (*Direção-Geral da Educação*, DGE) and the National Agency for Vocation Education and Training (*Agência Nacional para a Qualificação e o Ensino Professional*, ANQEP) created a "Welcoming Guide" (*Guia de Acolhimento*) to help officials and school staff implement the appropriate measures.

Various entities from the different ministries collaborate to welcome unaccompanied children and youth to ease the inclusion of these children and youth in the Portuguese society and schools.

Source: DGE and ANQEP (2020[11]), *Menores Estrangeiros Não Acompanhados (MENA) - Guia de Acolhimento: Educação Pré-Escolar, Ensino Básico e Ensino Secundário [Unaccompanied Foreign Minors (MENA) – A Welcoming Guide: Pre-school, Basic and Secondary Education]*, http://www.dge.mec.pt/sites/default/files/Projetos/Criancas_jovens_refugiados/guia_acolhimento_mena_agosto2020.pdf (accessed on 3 November 2021).

Regulatory framework for diversity, equity and inclusion in education

The Constitution of the Portuguese Republic establishes that:

> "[t]he State promotes the democratisation of education and other necessary conditions, for education, realised through the school and other educational means, to contribute to equal opportunities, the overcoming of economic, social and cultural inequalities, the development of personality and a spirit of tolerance, mutual understanding, solidarity and responsibility, for social progress and democratic participation in collective life."[11]

As mentioned above, Portugal has undertaken major changes to reform its education system. While one of its main focuses was the inclusion of students with SEN into mainstream education from the 1970s, the new regulatory framework established in 2018 has broadened the approach to inclusive education. Moving away from the one-dimensional approach to inclusion in education as the mere participation of students with SEN in mainstream schools, the new legislation adopted a vision that implies developing equitable quality education systems by removing barriers to the "presence, participation and achievement of all students in education" (Ainscow, 2005, p. 119[12]). Following international standards, inclusion in education in Portugal is seen as a process in which the education system has to adapt to the needs of all students, and all students should attend mainstream education as much as possible. According to this approach, a new set of legal instruments has been developed (see Table 2.1).

Table 2.1. New legislative framework on inclusive education

Law	Scope
Decree Law No. 54/2018, 6 July	Establishes the principles and norms that guarantee inclusion in education, understood as a process that aims to respond to the diversity of the needs and potential of all students, by increasing participation in the processes of learning and educational community life.
Decree Law No. 55/2018, 6 July	Establishes the curriculum for basic and secondary education and the guiding principles for the design, implementation and evaluation of the learning process.
Legislative Order No. 10-A/2018, 19th June and Legislative Order No. 16/2019, 4 June	Establishes the criteria for the composition of groups and classes and the period of operation of education and teaching establishments within the scope of compulsory education.
Legislative Order No. 181/2019, 11 June	Allows public and private schools, according to their autonomy and flexibility, to manage more than 25% of the curriculum by designing innovation plans.
Legislative Order No. 3-A/2020, 5 March	Regulates the National Examination Jury and Regulation of External Evaluations.
Legislative Order No. 5/2020, 21 April	Regulates the registration and renewal procedures and the rules to be observed in the distribution of students in each school and classroom.

Source: Ministry of Education (2022[3]), *OECD Review of Inclusive Education: Country Background Report*.

The Law for Inclusive Education - Decree Law No. 54/2018

Decree Law No. 54/2018 (to which amendments were introduced by Law No. 116/2019, 13 September) entered into force following a rigorous evaluation process of the past ten years' policies and practices and a broad national consultation in 2017. The proposal of the new Law on inclusive education was elaborated by a taskforce that listened to multiple stakeholders searching for the best solutions from didactic, pedagogical, health, education and social inclusion perspectives. The draft of the Decree Law was submitted to public consultation between July and September 2017, with broad participation of stakeholders, including public and private educational establishments, teachers' associations, professionals of the educational community, professional associations, parents and guardians' associations, representatives of persons with special education needs, federations, trade unions and individuals in general. Also participating were the National Council for Education, the Council of Schools, the Association of Schools of Private and Co-operative Education, the Portuguese Co-operative Confederation, the National Confederation of Solidarity Institutions, the Union of Portuguese *Misericórdias* and the Union of Portuguese Private Health Insurances. The political organs of the Autonomous Regions were also consulted (Ministry of Education, 2022[3]).

It establishes the principles and regulations that ensure inclusion as a process by which the education system must adapt to respond to the diversity of needs and capabilities of each student through increased participation in the learning processes and educational community. According to the law, inclusive education has eight main principles that must guide its implementation: (1) Universal education; (2) Equity; (3) Inclusion; (4) Customisation; (5) Flexibility; (6) Self-determination; (7) Parental involvement; and (8) Minimum interference.

Equity, as one of the core principles of inclusive education, must guarantee that all students have access to the necessary support to achieve their learning and potential, while inclusion is the right of all children and students to access and participate fully and effectively in the same educational contexts. In this sense, schools, and more broadly the education system, must adapt to respond to the needs of each student, valuing diversity and promoting equity and non-discrimination in accessing the curriculum and the different levels of education.

Furthermore, the new law on inclusive education reflects a move away from the rationale that it is necessary to categorise to intervene. This means that there is no need to categorise students based on personal characteristics or establish a formal diagnosis of special education needs to provide specific support. Rather, it seeks to ensure that all students can access the curriculum and realise the Students'

Profile. Providing relevant support can be realised through reasonable accommodations, i.e. differentiated learning paths that allow each student to progress in the curriculum in a way that ensures their educational success. Therefore, Decree Law No. 54/2018 abandons categorisation systems for students, including the categories associated with special education needs. By doing so, it removes the restricted concept of "support measures for students with special education needs". Instead, it takes a broader view, implying a whole school approach, which considers multiple dimensions and the interactions between them. It aims to end segregation and discrimination based on diagnosis or clinical labels, as well as suppress special education legislation.

Under this approach, there is a need to evaluate the reasons why students encounter difficulties in the learning process, both taking into account the students themselves and their context (e.g. need for additional support, poor teaching, inappropriate curriculum, inadequate resources, socio-economic factors). Support is no longer the exclusive responsibility of a specific professional considered as a "specialist". Rather, a broader and systemic approach to support is adopted, considering all factors that increase a school's ability to respond to diversity. In this sense, building support networks within and between schools as well as between the school and its community is needed.

Every student has the right to receive adapted measures to support their learning and inclusion process and to specific resources that might be mobilised to meet their educational needs in all education and training offerings. The law distinguishes between three broad types of measures to support students (see Table 2.2).

Table 2.2. Support measures for the inclusion of all students in Portuguese mainstream schools

Type of support measures	Definition	Examples of measures
Universal Measures (*Medidas Universais*)	Support measures that schools use to support the participation and learning improvement of all students.	Differentiated instruction, curricular accommodations and/or enrichment, promotion of pro-social behaviour.
Selective Measures (*Medidas Seletivas*)	Support measures aimed to support students' more specific needs that are not addressed by universal measures.	Differentiated curricular pathways, psycho-pedagogical support, and tutorial support.
Additional Measures (*Medidas Adicionais*)	Support measures aimed to respond to persistent needs related to communication, integration, cognition or learning that require specialised resources to support inclusion in education.	Significant curricular adaptations, individual transition plans, adapted teaching methodologies and strategies, development of personal and social autonomy competences.

Source: Ministry of Education (2022[3]), *OECD Review of Inclusive Education: Country Background Report*.

The Decree Law for inclusive education emphasises the responsibility of schools to identify barriers to individual students' learning and develop diverse strategies to overcome them. The law calls for a change in school culture and encourages multi-level and multidisciplinary interventions (see Chapter 4) to support all students who need additional support for their learning. To support the implementation of the Decree Law, meetings and training opportunities have been offered to school boards, teachers and other staff (Ministry of Education, 2022[3]).

The Law for Curriculum flexibility – Decree Law No. 55/2018

An increasing number of OECD countries implement measures to have greater flexibility in curriculum management. A recent OECD report covering OECD and non-OECD estimates that 61% of participant countries allow local flexibility on curriculum content, pedagogies or assessment (OECD, 2021[13]). In Portugal, since Decree Law No. 55/2018, schools' autonomy allows a flexible management of the curriculum and of the learning spaces and schedules, so that the methods, timing, instruments and activities can respond to the singularities of each student.

Schools have greater flexibility in curriculum management, which aims to foster interdisciplinary work to strengthen the competence areas set out in the Students' Profile and deepen the Essential Learnings. As such, within Decree Law No. 55/2018, schools are provided with up to 25% of curriculum autonomy to meet their specific needs by fostering pedagogical differentiation in the classroom, interdisciplinary work and project-based methodologies; creating new subjects; and allowing upper secondary students to choose their own course format by being able to swap and replace subjects within the scientific component of each course, among other measures (Ministry of Education, 2022[3]).

The Decree Law requires the creation of school-based strategies for implementing flexibility and autonomy as key concepts in the design and implementation of curricula and educational activities organisation, giving increased autonomy to schools in order to design and shape their curriculum options so that teaching and learning are meaningful and beneficial for all their students and their specific contexts. Decree Law No. 55/2018 on Curriculum Autonomy and Flexibility was established at the same time as the Decree Law No. 54/2018 on Inclusive Education. Through these legal documents, schools are encouraged to change their organisational and pedagogical practices, according to the Essential Learnings, to ensure that all students acquire the competences set out in the Students' Profile.

Decree Law No. 55/2018 also sets out the curriculum for primary, lower and upper secondary education, as well as the guiding principles for the design, implementation and evaluation of the learning process to ensure that every student acquires the knowledge and develops the skills and attitudes, which contribute to the achievement of the competences outlined in the Students' Profile. In line with the ENEC, the Decree Law No. 55/2018 enacts the mandatory creation of school-based strategies for the implementation of a specific curricular component, Citizenship and Development. This aims at developing a broad range of active citizenship competences deemed essential for any young person to achieve before they reach the age of 18.

The Decree Law was completed by Ordinance No. 181/2019, 11 June, altered by Ordinance No. 306/2021, of 17th December, which allows public and private schools to potentially manage more than 25% of the curriculum. The Ordinance aims at:

- Further facilitating the implementation of curricular and organisational innovative school plans based on the need to implement curricular and pedagogical appropriate responses to meet each educational community's challenges
- Improving the quality of learning, the focus on meeting diverse students' needs and, ultimately, the success of all.

To gain the possibility of managing more than 25% of the curriculum, school must design and present to the MoE an innovation plan, focused on curriculum and pedagogical innovation. In the school year 2020/2021, 103 schools implemented innovation plans.

To support and monitor the implementation of this curriculum autonomy and flexibility (A*utonomia e Flexibilidade curricular*, AFC) in all public schools, regional AFC teams were created. The members of these teams come from different entities of the MoE to ensure proximity to the field.

Responsibilities for and administration of inclusive education

Portugal is a semi-presidential republic, which joined the European Union (EU) in 1986. The Constitution of the Portuguese Republic (1976) governs the separation of powers into the legislative (the Assembly of the Republic), the executive (the Government) and the judiciary (the Constitutional Court as well as Administrative, Civil and Criminal Courts) branches. The President of the Republic – elected every five years – is the State's Chief, whose duties are to represent the country, as well as supervise and guarantee the regular functioning of democratic institutions. The President is also vested with the responsibility of commanding the Armed Forces, approving or vetoing legislation and nominating the Prime Minister, after

approval of the Parliament. The Parliament (*Assembleia da República*) is composed of 230 members who are elected by popular vote every four years (Liebowitz et al., 2018[14]).

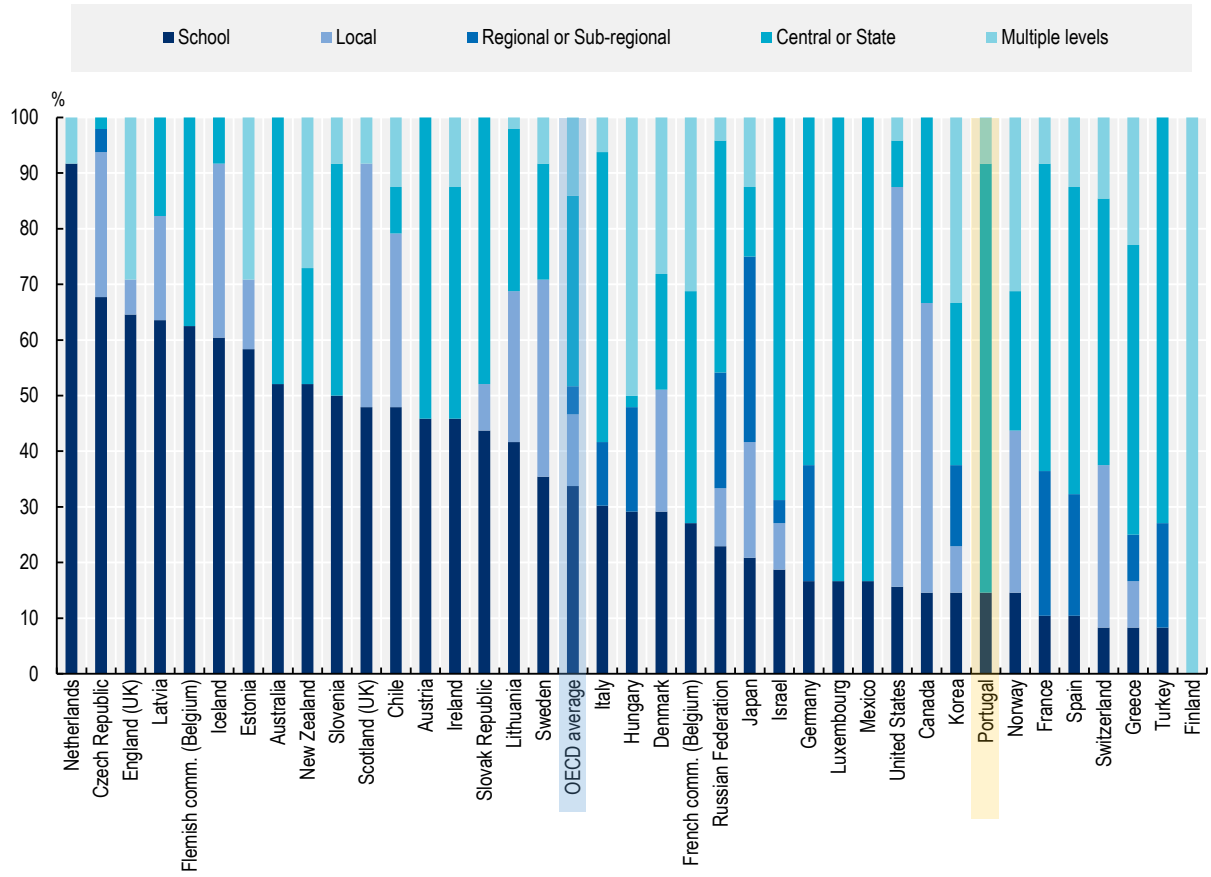
The executive power in Portugal is shared across two administrative tiers: central and local. The central government is divided into executive departments headed by their respective ministers who are nominated by the Prime Minister. The local level is sub-divided into municipalities (*concelhos*) and civil parishes (*freguesias*). Each municipality has executive and deliberative representation. The Municipal Chamber, composed of a President – the mayor – and other elected members (*vereadores*) acts as the executive body, whereas the Municipal Assembly supervises all municipal activity. At the sub-municipal level, civil parishes are governed by a Council of parishes (*junta de freguesia*) and an Assembly. The Portuguese Constitution established a political division of Portugal into Portugal Mainland and two Autonomous Regions, the Azores and Madeira, which have autonomous power over several areas, including education. Portugal Mainland is divided into five continental regions (North, Centre, Lisbon Metropolitan Area, Alentejo and the Algarve). However, no formal regional administration exists on the Continent. The five continental regions have no governance power and are only used for statistical purposes.[12] Instead, Supra-municipal administration is generally provided by such entities as Metropolitan Areas, Regional Co-ordination and Development Commissions (*Comissões de Coordenação e Desenvolvimento Regional*, CCDRs) or inter-municipal communities (*comunidades intermunicipais,* CIMs), which often have intertwining and overlapping functions.

Most regional approaches are related to the use of EU Structural and Investment Funds, put forth in the Partnership Agreement with the EU for 2014-2020. The five statistical territorial regions in continental Portugal – and to which the Review refer – are the North (*Norte*), Centre (*Centro*), Lisbon Metropolitan Area (*Área Metropolitana de Lisboa*), Alentejo and Algarve.

A centralised system

Governance in Portugal is highly centralised. Decisions about education policy are made at several levels of government, although a majority are made at the central level. Figure 2.3 shows that in 2017 in Portugal, 77% of decisions in public lower secondary education were made at the central level, only 15% at the school level, and 8% at multiple levels of government. This was below the OECD average of 34% for decisions made at the school level. At that time, Portugal had the second highest most centralised education decision-making of OECD countries and economies (OECD, 2018[15]).

Figure 2.3. Percentage of decisions taken at each level of government in public lower secondary education (2017)



Note: Countries are ranked in descending order of the percentage of decisions taken at the school level.
Source: OECD (2018[15]), *Education at a Glance 2018: OECD Indicators*, Table D6.1. https://dx.doi.org/10.1787/eag-2018-en.

StatLink https://stat.link/1lhzsb

There are multiple stakeholders involved in the functioning of the educational system at the national level (see Table 2.3). At the central level, government bodies under the MoE are the main ones responsible for managing the education system. Among others, they ensure the design and implementation of laws and policies, the creation of a common curriculum, the management of public schools, including vocational education and training (VET) and their regular evaluation. Entities that are part of the Portuguese MoE are the Directorate-General for Education (DGE), the Directorate-General for School Administration (DGAE), the Directorate-General for Schools (DGEstE), the Directorate-General for Statistics of Education and Science (DGEEC) and the Inspectorate-General for Education and Science (IGEC).

The Directorate-General for Education (*Direção-Geral da Educação*, DGE) is responsible for the management of the curriculum and the production of curricular reference documents for general education and out-of-school education to be developed by all schools at the national level (from pre-school to ISCED 3). In this vein, the DGE is responsible for the support and monitoring process regarding the implementation of education policies. Moreover, it is also responsible for the conception and management of specific programmes regarding school achievement.

The Directorate-General for School Administration (*Direção-Geral da Administração Escolar*, DGAE) ensures the implementation of policies for the strategic and efficient management of human resources in education. It guarantees the development of the human resources allocated to public educational structures. DGAE also responsible for the management of the teaching workforce and the organisation of school leadership, including recruitment and selection, career progression, remuneration and training.

The Directorate-General for Schools' (*Direção-Geral dos Estabelecimentos Escolares*, DGEstE) mission is to ensure the regional implementation of administrative measures and the exercise of peripheral competences related to the MoE, without prejudice to the competencies of the other central services. It has decentralised services with a regional scope. Some of its competencies involve monitoring, coordinating and supporting the organisation and functioning of schools and the management of their human and material resources, as well as promoting the development and consolidation of their autonomy. It is also responsible for the co-ordination with local authorities, as well as public and private organisations involved in education in order to strengthen local interactions and support the development of good practices. DGEstE's follow-up work is carried out in collaboration with schools, teachers, parents and the entire educational community.

The Directorate-General for Education and Science Statistics (*Direção-Geral de Estatísticas da Educação e Ciência*, DGEEC) is a central service under the State's direct administration, with administrative autonomy that operates under the purview of the MoE and the Ministry of Science, Technology and Higher Education (MCTES). The DGEEC's mission is to guarantee the production and statistical analysis of education and science. To create and ensure the proper functioning of the integrated information system of the MoE, DGEEC provides technical support for policy formulation, strategic planning and operations. Also, DGEEC observes and evaluates the overall results obtained by the educational, scientific and technological systems in co-ordination with other services of the MoE and MCTES.

The Inspectorate-General for Education and Science (*Inspeção-Geral da Educação e Ciência*, IGEC) has a specific law that details its organisational framework and states its role within the education system. Inspection activities range from the supervision of legal compliance to school external evaluation. In addition, there are many other activities the Inspectorate can perform, such as monitoring schools' performance, administrative and financial audits or even disciplinary proceedings against individual staff. Schools are inspected regularly (often more than once a year), although inspections can fill different purposes. IGEC gives significant attention to schools' culture, specifically to how they promote equity and inclusion. It recently modified its reference framework for evaluation by adding indicators to assess how the management of the school promotes the development of an inclusive education culture.

Portugal also created the National Agency for Qualification and Vocational Education and Training (*Agência Nacional para a Qualificação e o Ensino Profissional*, ANQEP). ANQEP is a public institute under the indirect administration of the State, with administrative, financial and pedagogical autonomy. The ANQEP has superintendence and joint supervision of the Ministry of Education and Labour and the Ministry of Solidarity and Social Security, in co-ordination with the Ministry of Economy and Digital Transition. Its mission is to contribute to improving the qualification levels of young people and adults in Portugal.

Table 2.3. Portuguese Ministry of Education's organisational responsibilities

Entity	Primary Responsibility
General Secretariat for Education and Science (SGEC)	• Responsible for quality of policy, information and communication. • Provides specialised technical support to the MoE (Ministry of Education) and MCTES (Higher Education) government members in conflict resolution and litigation, as well as in employment regime, human, material and financial resources management. • Responsible for European affairs and international relations.
General Directorate for Education (DGE)	• Responsible for the management of the curriculum and the production of curricular reference documents. • Ensures support and monitoring for the implementation of education policies. • Co-ordinates, collaborates with and/or supervises targeted educational programmes developed in schools. • Directs psychological services. • Assists in defining teachers' training needs and can provide theoretical training on inclusive education.
General Directorate for Schools (DGEstE)	• Ensures the implementation of educational policies defined within the scope of the educational system in an articulated manner by the various regional districts. • Monitors, co-ordinates and supports the organisation and functioning of schools and the management of their human and material resources, promoting the development and consolidation of their maintenance. • Provides support and information to users of the education system, in particular students and guardians, local entities and agents. • Defines, manages and monitors the requalification, modernisation and maintenance of the school network. • Discloses guidelines and technical information from MoE services. • Collects information as necessary for the design and execution of education and training policies to groups of schools or non-grouped schools. • Monitors the procedures and activities developed within the scope of the educational system regarding the control of the quality of teaching. • Cooperates with other services, bodies and entities, with a view to carrying out joint actions in the field of education and VET.
General Directorate for School Administration (DGAE)	• Ensures the implementation of policies for strategic management. • Ensures the development of the human resources of education allocated to the public educational structures. • Responsible for the management of the teaching workforce and the organisation of school leadership, including recruitment and selection, career progression, remuneration and training.
General Directorate for Statistics of Education and Sciences (DGEEC)	• Operates under the purview of the MoE and the MCTES. • Produces and analyses education and science data. • Provides technical support to the formulation of policies and strategic planning. • Creates and ensures a properly integrated information system for the MoE and the MCTES. • Manages the technological infrastructures of schools (computers, digital cloud, data communications network, internet, access control system, video surveillance system, etc.) • Develops new indicators on equity and inclusion.
General Inspectorate for Education and Science (IGEC)	• Ensures the legality of actions taken by services and departments of the MoE and the MCTES. • Monitors, audits and supervises the functioning of the technical-pedagogical and administrative-financial aspects of the activities of pre-schools, schools and out-of-school education, other educational and teaching institutions of public, private and co-operative networks, including higher education, as well as institutions teaching Portuguese abroad. • Assesses to what extent the management of the school promotes the development of a culture of inclusive education. • Identifies best practices that promote inclusive education.
Institute for the Management of Educational Finance (IGeFE)	• Ensures the programming, financial management and operational and strategic planning of the MoE. • Assures accurate execution of MoE budget and its reliable and sustainable management. • Provides comprehensive evaluation of policy implementation.
Educational Evaluation Institute (IAVE)	• Plans, develops and validates the tools for the external assessment of students' knowledge and ability in primary and secondary education.

	• Responsible for the development of national tests. • Processes and disseminates information related to decisions made for the improvement of the quality, effectiveness and efficiency of the national educational system. • Co-ordinates the Portuguese participation in international studies related to external student assessment. • Drafts tests certifying specific knowledge and abilities for other purposes and educational levels on an *ad hoc* basis.

Sources: Liebowitz et al. (2018[14]), *OECD Reviews of School Resources: Portugal 2018*, https://doi.org/10.1787/9789264308411-en; Ministry of Education (2022[3]), *OECD Review of Inclusive Education: Country Background Report*.

Undergoing a decentralisation process

As explained above, in Portugal, the core institutional actors at the local levels are the municipalities. There are no decision-making authorities at the regional level, except for the Autonomous Regions of the Azores and Madeira. The municipality is also a territorial unit endowed with legal personality and a certain administrative autonomy, led by its political and administrative bodies, namely the Municipal Assembly - legislative body - and the City Council - executive body. While central entities remain the main decision-making bodies, Portugal has intensified its decentralisation process in recent years, giving increasing responsibilities to municipalities in the field of education. The ongoing decentralisation process has encouraged the transfer of some decision-making and responsibilities to municipalities. These responsibilities include the areas of school social assistance, recruitment and management of some human resources (non-teaching staff), as well as curricular enrichment activities, facilities and the management of pre-school and basic education (Ministry of Education, 2022[3]).

Decentralisation became a dominant paradigm in the 1980s (Lima and Franca, 2020[16]). The Portuguese Education Act, established by Law No. 46/86, was the first major tool that established the reform of the role of the state in education. The act states that the education system must be organised in ways that that "decentralise and diversify the structures of the educational actions" (Art. 3). According to Santos, Rochette Cordeiro and Alcoforado (2018[17]), while the 1976 Constitution already recognises the role of municipalities, it is in 1999, with the Law No. 159/99, that the principles of administrative decentralisation and local power autonomy started to be realised. The law established the framework for the transfer of responsibilities to local authorities, delimiting the intervention of the central administration. It also reinforces principles enshrined in the Education Act by requiring municipalities to participate in the planning and management of educational equipment and infrastructure (in pre-school and basic education). A year before, in 1998, Decree Law No. 115-A/98, 4 May, was enacted. It approved the regime of autonomy, administration and management of pre-school, basic and secondary schools. This normative framework, with cuts from municipal initiative, also foresaw the creation of Local Education Councils (CLE), conceived as structures of participation of the various agents and social partners for the articulation of educational policy with other social policies, mainly in terms of socio-educational support, organisation of complementary curricular activities, school network, timetables and school transport. These councils were conceived as structures of participation and collaboration for various actors and social partners in order to articulate educational policy with other social policies, mainly in terms of socio-educational support, organisation of complementary curricular activities, school network, timetables and school transport (Ministry of Education, 2022[3]).

Nonetheless, little change happened in practice until Decree Law No. 7/2003, 15 January, was enacted (Santos, Rochette Cordeiro and Alcoforado, 2018[17]). This Decree Law introduced a diploma that requires the Constitution and functioning of Municipal Councils of Education (*Conselhos Municipais de Educação*, CME). The CMEs are essential entities that concretise the institutionalisation of the intervention of educational communities at the municipal level. The same legal act also introduced the Educational Charter (1st generation), which is a fundamental instrument for organising the education network and teaching offers. The contracts for the transfer of competences between state and municipalities,

established in Decree Law No. 144/2008, 28 July, defined the conditions for the transfer of the management of non-teaching staff in pre-schools and basic schools, of curricular enrichment activities in lower primary education and the management of public school facilities in upper primary and lower secondary education.

A few years later, an inter-administrative contract for the delegation of competences was signed under Decree Law No. 30/2015, 12 February. This Decree Law established the system of delegation of competencies to municipalities and inter-municipal entities in the field of social functions. Among other elements, this set a general programme for transferring responsibilities in education and better collaboration between the MoE (central level), municipalities (local level) and schools. Recently, Decree Law No. 21/2019, 30 January, reinforced and consolidated the framework for transferring power and competences to local authorities. It reinforces the areas that have, to some extent, already been decentralised. It gives the municipality new local and inter-municipal competences in the fields of planning, investment and management of education. However, the definition of the educational network, in conjunction with municipalities, inter-municipal entities and school clusters and non-clustered schools, as well as the decision on contracting or assigning creation and maintenance, remains within the competences of the MoE.

Furthermore, the competences of local authorities in the field of investment, equipment, conservation and maintenance of school buildings are now extended to all basic education and secondary education. The provision of meals in cafeterias of upper primary and secondary schools is now managed by the municipalities. Allocation of subsidies and/or provision of support and services by or contracted by municipalities are complementary to those available in schools. Furthermore, the responsibility for the recruitment, selection and management of non-teaching staff, of all levels and teaching cycles, is now ensured by the city councils. Consequently, this responsibility covers and reinforces the legal and functional mechanisms already enforced in the completion contracts.

In the area of security, the municipalities have also acquired, in conjunction with the security forces present in their territory and with the administrative and management bodies of clusters of schools and ungrouped schools, the competencies of organising the surveillance and security of educational equipment, namely the building and exterior spaces included in their perimeter.

Finally, as the highest expression of territorialisation, the municipal education council is an institutional body of intervention, leading consultation and debates to advance educational policy. Its composition has now been extended and includes, in addition to the members who already belonged to it, a representative of the co-ordination and regional development commissions, a representative of each of the pedagogical councils of the groupings of schools and non-grouped schools and a representative of social and solidarity sector institutions that develop activities in education.

Central policies and programmes for diversity, equity and inclusion in education

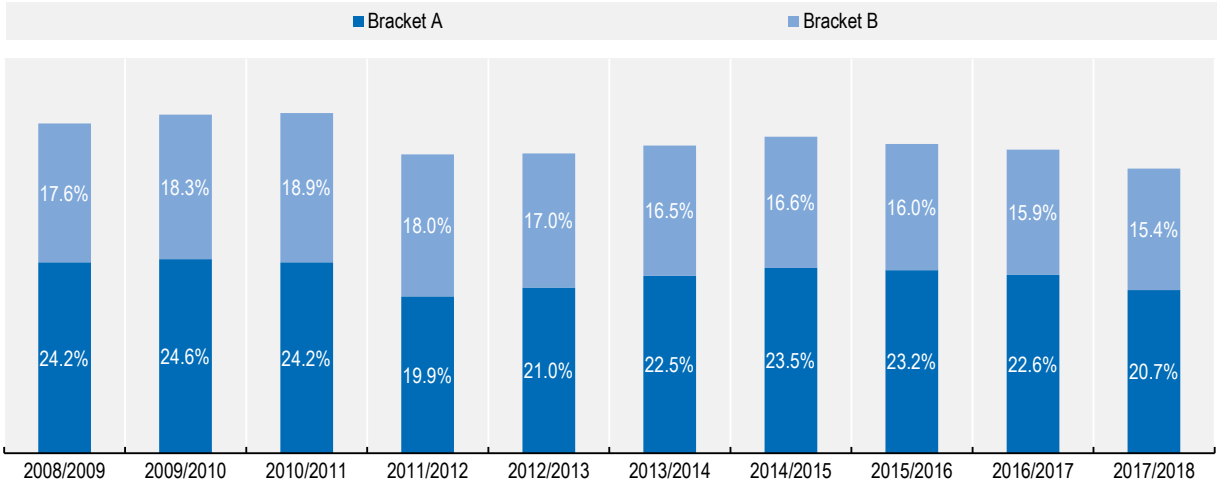
Many educational policies and programmes implemented in the last two decades in Portugal are aligned with equity and inclusion principles described above. They are designed to support students from disadvantaged backgrounds, promote school success and respond to Portugal's current educational challenges, including grade repetition and early school leaving. The primary policies and programmes that allow for adaptation of and support to learning processes for students or groups of students are described in this section.

School Social Assistance (ASE)

Implemented in 1971, the granting of School Social Assistance (*Ação Social Escolar*, ASE) aims to prevent social exclusion and early school leaving. It promotes school and educational success, allowing all students to successfully complete compulsory schooling, regardless of their social, economic, cultural and family

situation. As mentioned earlier in this report (see Chapter 1), eligibility for financial aid is structured in income brackets. Students in bracket A, corresponding to students with families receiving the lowest income, receive the most support, including free meals and textbooks. Students in bracket B also receive significant support, although less than students in bracket A (e.g. they have to pay 50% of the price of school meals). Students in bracket C are from families with the highest income and do not receive any support (Ministry of Education, 2022[3]). Between the 2014/2015 and 2017/2018 school years, the share of students benefiting from the ASE decreased from 40.1% to 36.1%. During the 2017/2018 school year, among the 36.1%% benefiting from the ASE, 20.7% were in bracket A, while 15.4% were in bracket B (Figure 2.4).

Figure 2.4. Students receiving the ASE in public schools, Continental Portugal (2008/2009 - 2017/2018)



Source: CNE (2020[18]), *Estado da Educação 2018 [*State of Education 2018*]*, Conselho Nacional da Educação, https://www.cnedu.pt/content/edicoes/estado_da_educacao/Estado_da_Educacao2018_web_26nov2019.pdf (accessed on 14 December 2021).

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The Priority Intervention Educational Territories Programme (TEIP)

The first generation of the Priority Intervention Educational Territories Programme (*Terrirórios Educativos de Intervenção Prioritária*, TEIP) was implemented in the 1996/1997 school year. The fourth generation, which is currently starting, includes 146 school clusters (about 18% of the total of Portuguese school clusters). The TEIP programme involves schools located in areas with high levels of poverty and social exclusion, as identified by educational (e.g., school failure) and socio-economic indicators (e.g., the ASE). Within the transition from third generation to fourth generation (TEIP 3 to TEIP 4) there was the revision of the criteria for integration in the TEIP Programme and thus, recently ten school clusters have been added to this programme (there used to be 136) following the Council of Ministers' Resolution 90/2021 in the scope of a national learning recovery programme that extended the TEIP programme to schools with a high number of students with an immigrant background and with a wide variety of mother tongues.

Through the TEIP 3, schools have been encouraged to develop a plan of improvement (*plano plurianual de melhoria*, PPM) based on their own knowledge of their context and challenges. The plans aim to strengthen their autonomy and positive discrimination measures to support the inclusion of all students. The last PPMs cover the years 2018 – 2021.

With the support of the MoE, TEIP schools implement their three-year Improvement PPM focused on four main, broad areas of intervention: (1) improvement of teaching and learning to ensure educational success; (2) prevention of early school leaving, absenteeism and indiscipline; (3) school management and organisation; and (4) relationship between school, family and community (Ministry of Education, 2022[3]). Regarding the monitoring process of the TEIP programme, there are regional teams from the MoE that support and provide a close contact for these schools to help them make the necessary adjustments to their commitments, methodologies and practices.

Specific Tutorial Support (ATE)

Implemented since the academic year 2016/2017, Special Tutorial Support (*Apoio Tutorial Específico*, ATE) consists of close and continued support to students in the second and third cycles of basic education who are over 12-years-old and have had two or more grade repetitions. It aims to prevent early school leaving, increase retention and, overall, promotes educational success by complementing other existing measures.

Choices Programme (PE)

First implemented in 2001, the Schools Programme (*Programa Escolhas,* PE) is a government programme promoted by the Council of Ministers under the leadership of the Portuguese High Commissioner for Migrations (*Alto Comissariado para as Migrações*, ACM). The PE targets 6- to 30-year-olds in vulnerable social and economic situations. These include children and young people with an immigrant background and from Roma communities. The PE, currently in its seventh generation, funds 101 projects, including three in the Autonomous Regions of Madeira and Azores. Its budget comes from the overall State budget and is co-funded by the European Social Fund and regional programmes in Lisbon and the Algarve.

The main objectives are to promote the social inclusion of children and young people from the most vulnerable socio-economic contexts. Various areas are included in the programme, including education and training considered essential to foster equal opportunities and inclusion. Projects funded by the PE are planned to be intensified in 68 municipalities, mobilising numerous partnerships between municipalities, parishes, school clusters, migrant associations and other relevant stakeholders[13].

Commissions for the Protection of Children and Youngsters (CPCJ)

Created in 2001, the Commissions for the Protection of Children and Youngsters (*Comissões de Proteção de Crianças e Jovens*, CPCJ) succeeded the Commissions for the Protection of Minors created in 1991. The CPCJ offices are spread throughout the country and aim to prevent or end current or imminent situations which endanger the lives of children and young people. In addition to other areas of intervention, they specifically consider children and young people's participation in school and their educational success. Each Commission includes a representative from the MoE, preferably a teacher. There are 269 teachers in total working at the CPCJ.

The National Programme for School Success Promotion (PNPSE)

The National Programme for School Success Promotion (*Programa Nacional de Promoção do Sucesso Escolar*, PNPSE) was created in April 2016. Its mission is to prevent school failure by reducing grade repetition rates through a bottom-up approach. Each school can implement its own strategic action plan to promote educational practices and improve learning[14]. The PNPSE has been engaging closely with local authorities and inter-municipal entities, with which it implements various programmes to combat school failure, such as the Integrated and Innovative Plan to Combat School Failure (*Plano Integrado e Inovador de Combate ao Insucesso Escolar,* PIICIE).

In practice, the PNPSE is based on a logic of proximity, meaning that it is implemented through teams constituted of officials close to the field. The PNPSE can:

- Support local initiatives of diagnosis and interventions, i.e., ensure the training of local officials and school staff to design and implement strategies tailored to their context.
- Promote practices that anticipate and prevent failure through an emphasis on early intervention instead of remedial strategies.
- Encourage common and collaborative strategies between local education authorities.

In August 2020, all the public schools of mainland Portugal (including the TEIP schools) were invited to apply for the Personal, Social and Community Development Plan (*Plano de Desenvolvimento Pessoal, Social e Comunitário,* PDPSC), which is part of the PNPSE and sets out measures to support students' return to school after the lockdown due to the COVID-19 pandemic. These plans aim to welcome students, reinforce their learning, promote well-being, foster social skills and enhance interaction with the community. From a total of 810 schools and school clusters, 668 have designed plans that comprise a total of 1 316 measures for social and educational intervention, corresponding to an average of two measures per plan. During the school year 2020/2021, schools and school clusters that applied were able to hire more than 900 specialised support staff (e.g. psychologists, social workers, IT technicians, artists) to implement these plans (Verdasca, J.; et al., 2020[19]).

*The National Plan for Arts (*PNA*)*

The National Plan for Arts (*Plano Nacional das Artes*, PNA)[15] is a culture and education initiative for 2019-2029 that operates through partnerships with school clusters that develop their own artistic and cultural projects promoting curricular development and inclusive education.

The PNA is currently working with 148 school clusters, spread across the country and the Autonomous Regions (Azores and Madeira) and two Portuguese schools abroad: Mozambique and Timor-Leste. In these schools, Coordinators of the Cultural School Project (CSP) are identified, and CSP Consultative Commissions are formed. The commissions are formed of school staff, staff from the departments of culture of the city councils, cultural institutions (directions of theatres, museums, educational heritage services, etc.), artistic associations, higher education institutions and representatives from previously described plans and programmes already existing in schools.

The PNA supports various artistic and cultural projects, including:

- Resident Artist Projects: An artist, cultural association or theatre company can reside in a school for a minimum of three months. During the 2019/2020 school year, there were 19 Artists in Residence. Due to the COVID-19 pandemic, most of this work was conducted through online communication.
- Digital Educational Resources Website: Created in March 2019, the online page provides digital resources for all students, teachers, mediators and parents about the arts, heritage, culture, citizenship, sciences and the humanities. More than 300 digital resources are provided to be incorporated in other curricular subjects at each year of education.
- Academia PNA: The PNA also provides training courses and accreditations for teachers. The vast majority are now online courses, carried out in partnership with the School Association Training Centres.

The Digital Programme for Schools

The Digital Programme for Schools (*Programa de Digitalização para as Escolas*[16]) is a part of the national Plan for Digital Transition. The Action Plan for the Digital Transition was formally created in 2020 (Council of Ministers Resolution No. 30/2020) to develop a programme for the digital transformation of schools. The

Programme has a strong commitment to teacher training to ensure the acquisition of the competences necessary for teaching in digital environments. The training of teachers is articulated with the Action Plan for the Digital Development of Schools, a fundamental document to support decision-making and monitoring of digital strategies. This measure aims to actively contribute to schools' technological modernisation, familiarising students with digital tools they might increasingly encounter in the labour market. The objective is to develop teacher's digital literacy skills so that they can use digital tools to strengthen pedagogical practices and simultaneously promote innovation in the teaching and learning process. Also, the programme aims to foster digital inclusion and give access to the internet to all. Within the frame of the programme, spurred by distance learning during the COVID-19 pandemic, computers with an internet connection have already been distributed to many students, giving priority to the most socio-economically disadvantaged students. Computers with an internet connection have also been distributed to all teachers. Digital access and literacy are important for inclusion not only to ensure certain student groups are not further excluded, but that digital education tools can also increase flexibility and personalisation for diverse student needs.

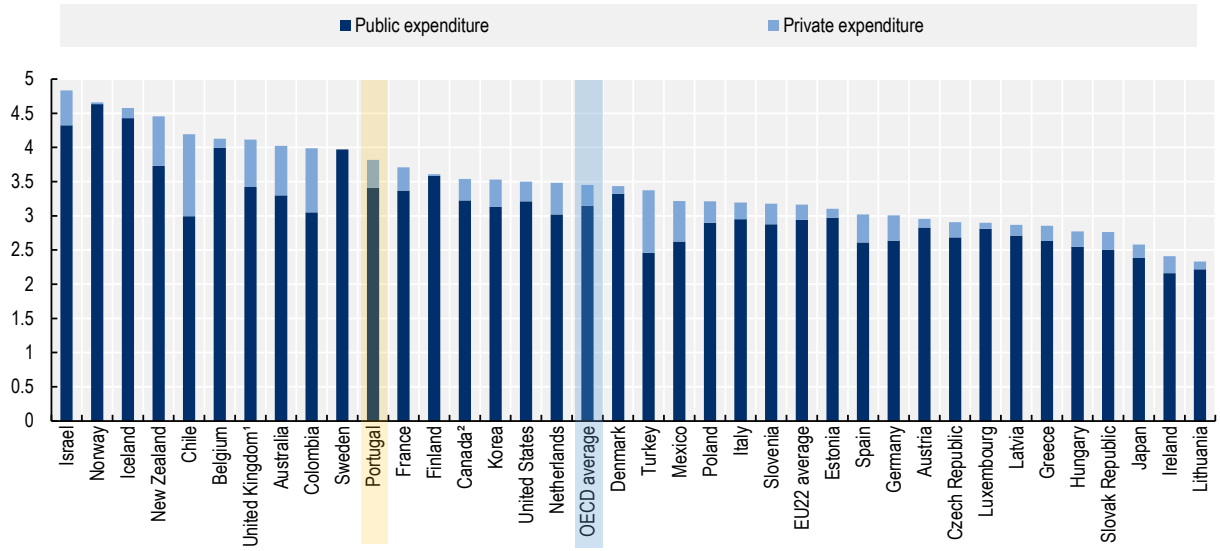
Resourcing for inclusive education

Overview on the funding of the education system

In comparison to other OECD countries, Portugal invests substantially in non-tertiary education. According to OECD (2021[20]), 3.8% of the added-value produced in the country (gross domestic product, GDP) in 2018 was dedicated to financing education, from primary to upper secondary education institutions. The share of GDP invested by Portugal in education was above the OECD average (3.4%) and, apart from France (3.7%), well above its Southern European peers (Figure 2.5).

Figure 2.5. Public and private expenditure on non-tertiary educational institutions as a percentage of GDP (2018)

Primary, secondary, post-secondary non-tertiary education, after transfers, in per cent



Notes: International expenditure is aggregated with public expenditure for display purposes.
1. Figures are for net student loans rather than gross, thereby underestimating public transfers.
2. Primary, secondary and post-secondary non-tertiary education includes pre-primary programmes.
Source: Adapted from OECD (2021[20]), *Education at a Glance 2021*, Figure C2.2, https://dx.doi.org/10.1787/b35a14e5-en.

StatLink https://stat.link/raiwbj

According to the OECD (2021[20]), between 2012 and 2018, the total expenditure per student in primary, secondary and post-secondary non-tertiary corrected for differences in purchasing power increased in Portugal, from USD 8 950 (EUR 7 876) to USD 9 300 (EUR 8 183) (+0.6%). Meanwhile, the total expenditure on education institutions at the same levels slightly decreased (-1.1%), which can be explained by a decrease in the student population (-1.8%). In sum, although between 2012 and 2018, Portugal's student population has decreased and less is spent on education, the country spends more per student. Similarly, Portugal has observed a negative change in public expenditure on educational institutions as a share of the GDP within the same period (-7.4%). More than two-thirds of OECD and partner countries with available data experienced a reduction in the total expenditure on educational institutions as a share of GDP, although this is in most cases the result of a higher rise in GDP compared to education expenditure. Lithuania and Portugal were among the countries with the largest negative adjustments over that period, due to increases in GDP over 5% combined with reductions in total expenditure on educational institutions (OECD, 2021[20]).

While the share of GDP spent in education is relatively high at all educational levels, the absolute level of expenditure and expenditure per student is close to the OECD average. In fact, the annual expenditure per student in pre-primary and primary schooling, corrected for differences in purchasing power across countries, is below the OECD average at all levels of education except from lower secondary (Table 2.4). In 2018, Portugal spent slightly more than the OECD average in secondary schooling, a notable change in comparison to 2014 when the annual expenditure per student in secondary schooling, corrected for differences in purchasing power across countries, was about 15% below the OECD average (Liebowitz et al., 2018[14]). Although expenditure has increased since 2014 at all levels of education, it still favours secondary and tertiary levels compared to pre-primary and primary ones (Table 2.4).

Furthermore, at the non-tertiary level, the funding of education in Portugal is mostly supported by public revenues, representing 89% of the total expenditure. The remaining 11% of the funding comes from household expenditure, while private sources do not participate in the funding of non-tertiary education (OECD, 2021[20]).

Table 2.4. Selected indicators of expenditure in education (2018)

	Education level	Portugal	OECD average
Annual expenditure per student (in equivalent USD PPP)	Pre-primary and primary	8 812	9 550
	Lower secondary	11 354	11 091
	Upper secondary	10 670	11 690
	Tertiary	11 779	17 065
Expenditure on educational institutions (% GDP)	Pre-primary and primary	1.5	1.5
	Lower secondary	1.1	0.9
	Upper secondary	1.2	1.1
	Pre-primary to secondary	3.8	3.4
	Tertiary	1.1	1.4

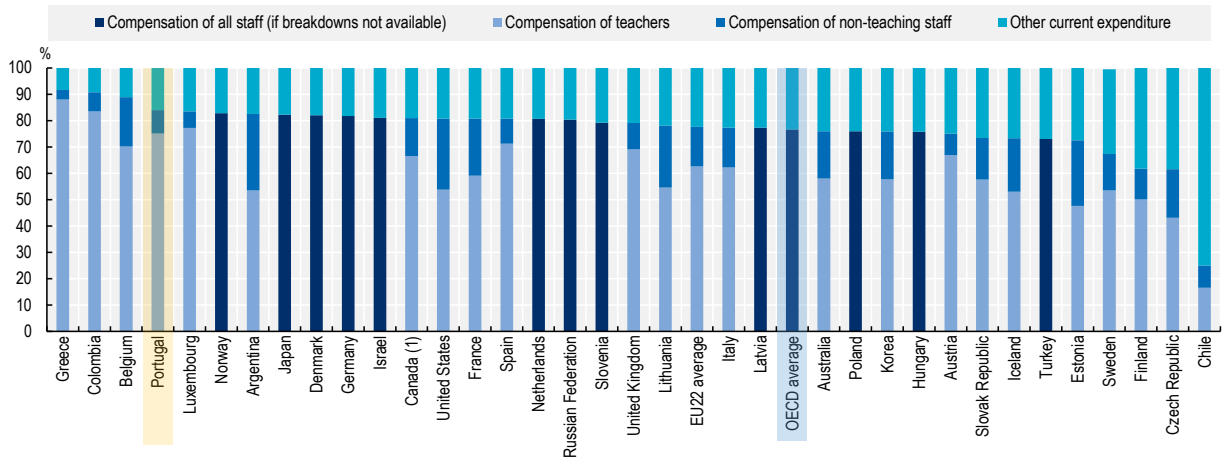
Source: OECD (2021[20]) *Education at a Glance 2021: OECD Indicators*, https://dx.doi.org/10.1787/b35a14e5-en.

According to the National Council of Education (*Conselho Nacional da Educação*, CNE) (2020[18]), in 2019 Portugal spent a total of around EUR 9 million in education. About 71.2% (around EUR 6.4 billion) of this amount was devoted to non-tertiary education from pre-primary education to upper secondary. While the amount spent on non-tertiary education significantly decreased between 2010 and 2015, it steadily increased until 2019, the year that registered the third highest amount spent on education since 2010. Still in 2019, around EUR 5.7 billion were spent in pre-primary education, the highest amount since 2013 (EUR 5.8 billion). It was highlighted in the 2019 State Budget that the "budget has gradually increased over the past years. This is the result of an increase in the budget dotation for public pre-school classrooms, including animation activities and support to the families that extend the daily functioning hours of pre-schools, promoting a balance between work and family".

Also, overall, 98.4% of the budget for non-tertiary education was spent on current expenditures and less than 2% on capital expenditures[17] (CNE, 2020[18]). Regarding current expenditures, as in most OECD countries, the largest share is spent on compensation of staff. In 2018, about 75% was dedicated to the compensation of teachers, 9% to the compensation of non-teaching staff and the remaining 16% to other current expenditures (see Figure 2.6). The latter category includes teaching materials and supplies, ordinary maintenance of school buildings, provision of meals and dormitories to students, and rental of school facilities.

Figure 2.6. Distribution of current expenditure in public and private educational institutions (2018)

Primary, secondary and post-secondary non-tertiary education, in per cent



Notes: 1. Primary, secondary and post-secondary non-tertiary education includes pre-primary programmes.
Countries are ranked in descending order of the share of all staff compensation.
Source: Adapted from OECD (2021[20]), *Education at a Glance 2021*, Figure C2.6, https://dx.doi.org/10.1787/b35a14e5-en.

StatLink https://stat.link/drgaus

Budgeting and planning process

The governance of the funding system in Portugal is historically largely centralised. Article 74 of the 1976 Constitution besides establishing that everyone has a right to education, indicates that the State must be responsible in ensuring universal and free basic education for all. This logic is extended to secondary education. The budget process for financing schools is annually defined, based on information provided by schools and central estimates, and is anchored in past expenditure corrected for inflation. The public budget for education is proposed by the MoE, negotiated with the Ministry of Finance and finally approved by both the central government and parliament (Liebowitz et al., 2018[14]). Two separate mechanisms exist for budgeting centrally distributed funds, one for the teaching salary component of the budget and the other for non-teaching salaries and non-salary expenditures.

Furthermore, the financing of schools and the provision of resources are structured around two main axes (Ministry of Education, 2022[3]):

- Costs, including salaries for teachers and other professionals and investment expenditures, supported directly by the MoE, which regularly transfers the required funds to schools.
- Annual budget allocation for each school containing MoE funding for the ongoing period.

Teaching salary budget

Each spring, the DGEstE, in articulation with ANQEP for planning VET courses, provides student enrolment projections to each school cluster administration. The school cluster administration uses this information to decide on an offering of classes sufficient to meet student needs, following the guidelines presented in a set of governmental dispatches for the organisation of the school year. These include Normative Dispatches No. 10-A/2018, 19th June, and No. 16/2019, 4th June, which provide orientations on the class size and the organisation of the school year (*organização do ano letivo*), an official regulation published on a yearly basis by the Secretary of State for Education that defines key elements such as

staffing rules for schools. The school cluster proposal takes into account planned strategic projects, including PNPSE and TEIP, and the estimated number of classes previously approved by DGEstE on the basis of the estimated distribution of students. DGEstE reviews, corrects as necessary and ultimately validates the network of class offerings for each school and the entire system (Ministry of Education, 2022[3]).

Once classes have been determined, the school cluster administration reviews the available permanent teaching staff returning to the cluster, compares the instructional needs with the available human resources and submits a proposal for any missing teaching hours to the DGAE to meet its instructional needs. Similarly, DGAE reviews the proposal, corrects it as necessary, validates the number of required teachers and then assigns the required teachers following established protocols. Finally, the financial department within the MoE, the Institute for the Management of Educational Finance (*Instituto de Gestão Financieira da Educação*, IGeFE), receives the defined staffing levels for each school cluster and transfers earmarked funds to schools and school clusters to pay teachers' salaries (Liebowitz et al., 2018[14]).

The source and allocation of funding for teaching staff and specialised technicians mainly come from the state budget and funds from the Human Capital Operational Programme (*Programa Operacional Capital Humano*, POCH). This system is managed by specialised entities of the MoE (mainly DGAE and DGEstE), according to centrally established criteria and guidelines to monitor local needs (see 0.).

Non-teaching salary budget

A parallel process exists for planning and developing the budget for the non-teaching component of schools' budgets. Each spring, school administrators prepare a proposal for their non-teaching expenses to submit to IGeFE. This proposal takes into account prior-year expenditures, planned investment in school facilities and resources, and other projects pursued by the school, all following the guidelines relating to non-teaching expenses in the organisation of the school year regulations (Liebowitz et al., 2018[14]).

IGeFE is responsible for analysing the budget proposal according to legal criteria and for defining the school budget. The amount requested by the school is contrasted with the results of a model recently developed by IGeFE based on historical expenses, number of students, levels of education, facilities at the schools, the existence of central heating and the geographic location of schools. This model, which was newly introduced for the 2017/2018 school year and is not public, automates the rules defined for each expenditure item. During the school year, IGeFE may approve additional *ad hoc* funding following a justified request from a school (Liebowitz et al., 2018[14]).

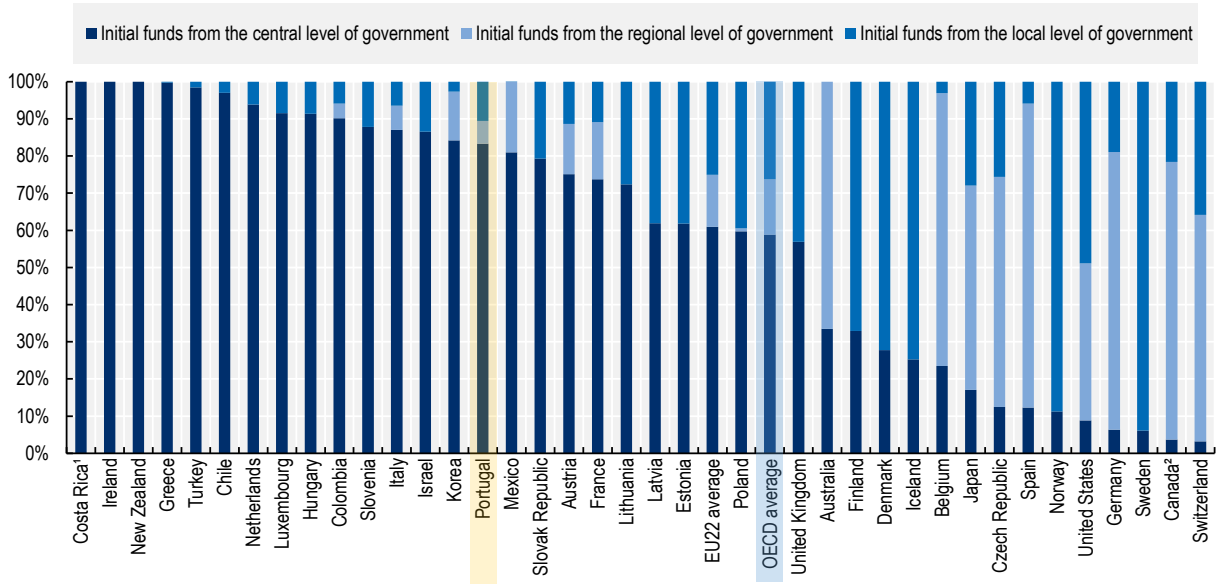
Budgetary responsibilities and resource allocation

The funding system for education in Portugal is based on a system of transfer from central authorities towards the other levels of administration, which benefit from increasing autonomy to manage their resources (Lima and Franca, 2020[16]). Most of the budget is calculated and managed at the central level (see

Figure 2.7). It is then distributed through several funding streams, either directly to school cluster administrations or to municipalities that then distribute resources to schools according to needs assessments and established partnerships mechanisms. While this is true for current expenditures, most capital expenditures are managed by the municipalities or the *Parque Escolar*. *Parque Escolar* is a state-owned company, functionally dependent on the MoE, created in 2007. The main goal for the creation of *Parque Escolar* was to plan and carry out a Programme for the Modernisation of Secondary Schools, with the objective of updating and restoring the physical, environmental and functional effectiveness of secondary school facilities. *Parque Escolar* also inaugurated a new management model for the maintenance of the intervened school infrastructures (Liebowitz et al., 2018[14]). Actors at the different

levels of the education system and other relevant stakeholders take part in the allocation of the educational funds and resources.

Figure 2.7. Distribution of initial sources of public funds for education (2018)



Notes: 1. Year of reference 2018.
2. Primary, secondary and post-secondary non-tertiary education includes pre-primary programmes.
Countries are ranked in descending order of the share of initial sources of funds from the central level of government.
Source: Adapted from OECD (2021[20]), *Education at a Glance 2021*, Figure C4.4, https://dx.doi.org/10.1787/b35a14e5-en.

StatLink https://stat.link/07bc5e

While the education system remains largely centralised, policy initiatives, programmes and support measures have recently created room for local agents, namely schools and municipalities, to intervene with relative autonomy. They are increasingly able to implement initiatives in partnership with schools and other stakeholders so that they can adapt to local contexts and further promote inclusion and school success.

Schools and school clusters have limited autonomy to manage their budget. The vast majority of schools' operating budgets are devoted to staffing and transferred to competent units within the MoE (mainly DGAE and DGEstE) through IGeFE. However, the levels of staffing, the selection of staff and the assignment of teaching staff to schools are decisions made at the central level (see Chapter 3) as established in Decree Law No. 41/2012 (first established by Decree Law No. 139-A/90) Career Statute of Childhood Educator and Basic and Secondary Education Teachers (*Estatuto da Carreira dos Educadores da Infância e Professores do Ensino Básico e Secundário*). The Statute[18] is the reference document for the management of teacher's careers from their education and training to their retirements. It describes the rights and duties of educational staff and sets rules related to recruitment, salary, career evolution opportunities, etc.

School clusters control the assignment of teachers to roles. In particular, at the school level, the directors of the school clusters are responsible for: (1) managing the allocated funds (except for the salaries of teachers and other professionals and investment expenditure, which are directly managed by the MoE); (2) monitoring spending; and (3) reporting the number of students engaged in school activities and their academic achievement. Schools report their annual activities plan and budget to the MoE each year. This report includes the initiatives and activities promoted by the school, the associated expenditures and

students' academic results. Schools also report periodically on additional funding allocated to them through applications for specific support measures or programmes. These are sent to the administrative bodies mentioned above that have approved the initiatives and the associated funding.

Municipalities have formal responsibilities for the education funding of pre-primary and primary schools (first cycle/lower primary). In particular, they are responsible for providing non-teaching staff, maintaining buildings and assigning/maintaining standard equipment. Additional responsibilities are in the process of being transferred to the municipalities, covering non-instructional aspects of education.

Since 2019, with Decree Law No. 21/2019 (Framework for the transfer of competences to municipalities and to intercity entities in the field of education), the competences of municipalities in the field of investment, equipment, conservation and maintenance of school buildings are extended to all basic education and secondary education, with the exception of schools whose education and training offer covers, due to its specificity, a supra-municipal territorial area. In preparing the Educational Charter[19], the municipalities and the government department with competence in the matter must closely collaborate and coordinate their interventions. At the municipal level, the Educational Charter is the instrument for planning. The educational charter is thus the reflection, at the municipal level, of the planning process at the national and inter-municipal level of the network of education and training offers.

Municipalities report their annual interventions in terms of activities promoted or supported, the number of students involved and the expenditure incurred. Results and cost effectiveness are not usually evaluated. Annual accounting reports from municipalities are submitted to the Municipal Assembly for approval before being disseminated on their websites.

Other ministries, especially the Ministry of Work, Solidarity and Social Security (MTSSS) and the Ministry of Health (MS) also contribute to the funding of education. These contributions concern areas within their political responsibility that also overlap with the MoE. Some collaborations happen within the framework of local and informal articulation. Others take place within the framework of programmes and measures involving institutionalised partnerships between these ministries. These collaborative partnerships are more active and frequent when they occur in the context of social inclusion policies, such as expenditure and measures related to special education. These partnerships sometimes extend to local and regional organisations in the community in order to guarantee a greater level of responsibility and autonomy in delivering and managing education at a local level by municipalities.

Occasionally, companies and other entities (such as foundations) are also involved, collaborating on, and occasionally launching, inclusive education initiatives and projects. Also, schools may sometimes have and use their own revenues, which they obtain from school fundraising initiatives and collaborations with companies that co-finance specific projects by granting different types of support to schools.

Targeted resources to support equity and inclusion

Unlike most countries, Portugal recently legislated a non-categorical approach to determining special needs. As described above, Decree Law No. 54/2018 organises educational support according to a multi-level approach to students' needs. Students are not labelled, but the school must identify the students who need universal, selective and additional support measures. Moreover, there are no financial incentives for schools welcoming students from diverse and/or disadvantaged backgrounds. Students must attend the school of their geographic residence area and while no school can refuse a student's registration based on their characteristics, it must ensure that the students receive the necessary support. Chapter 4 on school-level interventions provides more details on the measures implemented at the school level to support students' needs.

It is therefore possible to divide Portuguese funding schemes into three broad categories (Ministry of Education, 2022[3]; European Agency for Special Needs and Inclusive Education, 2016[21]), at least in theory:

- General funding described above, devoted to the implementation of universal support measures. These measures are allocated to schools to provide flexible teaching and learning processes, within the general school dynamics. The resources are allocated to provide general education to all students.
- Through funding, devoted to selective support measures. This funding provides adaptive and intensified support allocated to schools for groups of students-at risk of failure who may need additional help. This is complementary to universal support. Several programmes for equity and inclusion included in this category receive funding from EU institutions.
- Input funding, dedicated to additional support measures. These are resources allocated to individual students in need of intensive additional support. The support is specialised and individualised and responds to specific needs. It is frequently associated with special education needs.

As described above, Portugal has implemented various policies and programmes to promote equity and the inclusion of its students and provide them with additional support. About EUR 19 million was spent on the PNPSE during the 2019/2020 school year to support non-TEIP schools in promoting school success, including EUR 175 271 coming from EU funding (IGeFE, 2019[22]).

The additional resources allocated to school clusters involved in the TEIP are dedicated to:

- human resources development, mainly through training opportunities
- additional human resources (teachers, psychologists, social workers, and mediators, among others)
- additional funds that allow schools to organise learning networks, as well as the monitoring and the assessment by the higher education institutions
- diversification of the educational offers.

Support is also provided for costs associated with external evaluation, the training of human resources, and school meals for deprived students. Resource allocation is based on the school's own need assessment, set out in their PPM. During the 2018/2019 and 2019/2020 school years, TEIP school clusters benefited from three additional credit hours for each class created (DGE, 2020[23]). Credit hour (Crédito Horário, CH) refers to a set of hours attributed to each school by the MoE, which is calculated depending on the hours estimated in curricular matrix and the exercise of organisational functions. TEIP school clusters may also benefit from additional support, mainly through European funds (see Box 2.2). DGEstE has received POCH and European Social Fund (ESF) financing operations to respond to this challenge for several years (see Annex 2.B).

Box 2.2. Learning Communities Project: INCLUD-ED

Scope of the project

The INCLUD-ED Project started in 2011 as a research project funded by the EU Reform Support Service (SRSS) of the European Commission and coordinated by the University of Barcelona, Spain. It aims to identify best practices, or "Successful Educational Actions for All", that promote school success and the improvement of social cohesion by strengthening the participation of families and communities.

INCLUD-ED in Portugal

The Learning Communities Project - INCLUD-ED (*Projeto Comunidades de Aprendizagem*, INCLUD-ED) in Portugal is supported by the MoE and implemented by a team of the University of Barcelona. It aims to implement good practices to reduce school failure and promote inclusion in Portuguese schools by developing research and activities within schools with the strong participation of parents and local

communities. A pilot programme started in Portugal during the 2017/18 school year in 11 TEIP schools. The objective is to implement the project in 50 TEIP schools, and strengthen collaboration between them, in order to obtain comparable results that could contribute to the development of a sustainable strategy at the national level.

In order to reach these goals, the research and implementation team from Barcelona provides technical support to the DGE by working with school clusters, as well as training teachers and teacher trainers who will guarantee the sustainability of the project. The training of teacher trainers began in 2019, followed by the training of school teams in 2020. In addition, stakeholder meetings have been organised since 2020 to ensure collaboration and the monitoring of the project.

Source: DGE (2020[23]), *Relatório Anual TEIP, Territórios educativos de intervenção prioritária*, https://www.dge.mec.pt/sites/default/files/EPIPSE/relatorio_teip_2019_2020.pdf (accessed on 7 September 2021).

In addition, schools can benefit from extra resources to apply selective and additional measures through applications for funding to European funds, mainly dedicated to human resources and managed by the European Commission. The ESF provides resources for the organisation and availability of education and training offers. These funds sometimes constitute a considerable share of the total budget dedicated to equity and inclusion programmes. For example, the PNPSE created in 2016 had a total approved budget of EUR 32 million, including EUR 3 million from national funds and EUR 29 million from European funds (Liebowitz et al., 2018[14]). Specific procedures for applying to EU funds have also been developed. Applications are now made by municipalities together with schools through the proposal of several projects aiming at promoting school success and the inclusion of all students (Ministry of Education, 2022[3]).

Furthermore, a significant budget is allocated to special education provisions. For example, during the 2020/2021 school year, EUR 283.199 million was dedicated to special teachers, a significant increase compared to 2015/2016 (EUR 206.328 million). Resource Centres for Inclusion (CRIs) received EUR 27.826 million in 2020/2021, slightly more than the previous years, although less than in 2015/2016 (EUR 30.584 million). Also, Decree Law No.163/2007 requires that all schools have disability-friendly access points. More broadly, it established the accessibility regime for public and residential buildings and public spaces. There has also been an increase in the funding of programmes and initiatives to support equity and inclusion more broadly. For example, TEIP schools received increasing funding between 2015/2016 (EUR 21.298 million) and 2020/2021 (EUR 26.337 million). In 2019/2020, about EUR 219 000 was dedicated to the PNA, increasing to EUR 479 000 in 2020/2021. Table 2.5 provides an overview of the funding for equity and inclusion in education between the 2015/2016 and the 2020/2021 school years.

Table 2.5. Expenditure on policies for equity and inclusion[1] in education (2011/2012 - 2020/2021)

In EUR million

Total Education Budget	2011/2012	2012/2013	2013/2014	2014/2015	2015/2016	2016/2017	2017/2018	2018/2019	2019/2020	2020/2021	2021[2] (Initial Consolidated Allocation)
Execution (consolidated total) by economic year					5 854 603	6 253 867	6 222 026	6 330 069	6 443 871	6 673 413	7 017 147
	Programmes/Initiatives to promote equity and inclusion in schools										
PNPSE						32 000	32 000	32 000	18 847[3]	n. a.	
TEIP[4]	12 938	23 956	23 542	21 288	21 298	21 301	23 020	24 321	25 320	26 337	
ATE[5]						n. a.	10 455	11 452	n. a.	8 883	
PNA									219	479	
Psychology Services[6]	n. a.	17 373	18 783	20 029	20 283	20 347	26 028	26 117	29 406	29 688	
EMAEI										2 025[7]	
Measures to promote success[8]						433 388	435 374	462 141	522 510	528 772	
PDPSC										22 500	
	Support to socio-economically disadvantaged students										
ASE (execution by economic year)	173 502	168 228	189 108	189 443	185 435	259 179	254 831	248 437	250 411	199 925[9]	253 468
	Special Education										
Specialised teachers[10]	n. a.	n. a.	193 060	192 206	206 328	219 138	238 955	247 165	306 143	283 199	

Specialised technicians (not psychologists)	n. a.	n. a.	6 405	6 901	7 358	7 625	7 460	5 935	6 252	8 490	
Early childhood intervention[11]	n. a.	20 428	20 428	20 428	20 428	20 428	19 855	19 855	19 855	19 855	
Resource Centres[12]	15 383	8 631	31 581	30 466	30 584	26 159	26 243	24 883	24 923	27 826	
Transport[13]	n. a.	n. a.	6 800	6 900	5 218	7 559	10 999	12 411	12 680	11 858[7]	

Notes: 1. Expenditure on equity and inclusion policies includes all nationally managed funds, combining Portuguese and European sources.
2. The 2021 value corresponds to the initial allocation. The performance values presented correspond to the first year of the academic year pair.
3. The amount indicated in 2019/2020, stems from the permanence in the system of the resources used in previous years.
4. Extrapolated values based on trend line. From 2012/2013, there has been an increase in TEIPs schools (from 110 to 136), as well as in reinforced Credit Hours in recent years.
5. The programme was first implemented in the 2016/2017 school year. In 2019, due to the COVID-19 pandemic, no survey was not carried out to estimate the number of teachers involved. The reduction in the funding dedicated to ATE during the 2021/2021 school year is due to the pandemic that reduced the amount of in-school ATE provided.
6. This psychologist allocation network is complemented by psychologists allocated by municipalities. Calculations are based on the average salary indexes indicated by IGeFE.
7. This amount corresponds to the reinforcement of two more Credit Hours per EMAEI to provide more support within schools.
8. These values corresponds to the reinforcement of specialised technicians within schools.
9. In 2020/2021 the execution values decrease due to the pandemic that reduces the amount spent on meals and school transport.
10. The number of teachers considered for the calculations was made available by DGAE and DGEEC and was based on the average salary indexes indicated by IGeFE.
11. In the 2017/2018 school year, the number of teachers was lower as a result of the diagnosis that was carried out. It indicated the need to allocate the number of specialised technicians that were missing, to promote therapeutic support. The number was maintained in the following years. The professionals that MoE gave to the system (teachers) was greater than the therapists given by Health, Social Security. There was an increase in the referral, in the system, of children from zero to three years old and still with serious pathologies, with an effective need for rehabilitative intervention and, therefore, in need of therapists (professional careers in Health and Social Security).
12. The indicated values include the following items: Resource Centres for Inclusion (CRI), special education schools, educational area, materials/supplies for the support learning centres.
Resource centres for information and communication technologies (CRTIC), Braille, digital and relief textbooks, DGE budget and the system for the allocation of support products.
It should be noted that in the case of the special education schools and educational area, the values vary depending on the number of students attending this offer each year.
13. The reduction of the amount is due to the pandemic that obviated the transportation of many students who stayed home due to lockdowns.
Source: Ministry of Education (2022[3]), *OECD Review of Inclusive Education: Country Background Report*. IGeFE/ME – Budget execution reports.

Furthermore, Portugal recently created two funding formulae that allow non-TEIP and TEIP schools to receive extra resources. Normative Dispatch No. 10-B/2018 established the rules for the organisation of the school year in pre-primary, basic and secondary education. It recognises the importance of strengthening schools' autonomy in the management of resources while ensuring work efficacy. It introduced greater flexibility in the use of hour credits attributed to management staff and to the implementation of pedagogical measures. The overall CHs are determined based on the number of existing classes and hours already available under the terms of article 79 of the 1990 Statute of the Career of Early Childhood Educators and Teachers of Basic and Secondary Education (ECD).

The Normative Dispatch also states that, in school clusters to which the first formula applies, if the total number of hours remains insufficient to reach the school's objectives, the school can present a demand to the DGE to obtain more CH. This demand can be rejected or validated upon confirmation from the DGE and IGeFE. Dispatch No. 10-B/2018 allows non-TEIP schools to receive extra CHs based on the following formula:

CH = 7 x number of classes – 50% of the total hours stated in article 79[20] of the ECD

The following formula applies to TEIP schools:

CH = 10 x number of classes – 50% of the total hours stated in article 79 of the ECD

The CH calculated according to the above-mentioned formulae are distributed similarly across the whole school cluster, although their management is flexible and the distribution is made by school leaders according to the needs of their students. The reinforcement of the CH as a result of the application of the formulae is exclusively used for the recovery and consolidation of learning, through hours of educational support and class support, mainly in the years of cycle transition and in the 3rd year of schooling.

Additional resources to recover from the lockdowns due to the COVID-19 pandemic

During the preparation of the 2020/2021 school year, Portugal recognised the necessity of strengthening the availability of human resources to ensure the implementation of measures to support learning losses due to school closures caused by the pandemic. Following the Council of Ministers' Resolution No. 53-D/2020, 20 July, more than 3 300 teachers were hired through the extension of CHs to provide additional support to students through the Specific Tutorial Support Programme (*Apoio Tutorial Específico*). Moreover, 900 specialised staff were recruited to support schools in the implementation of Personal, Social and Community Development Plan (*Plano de Desenvolvimento Pessoal, Social e Comunitário,* PDPSC).

Dispatch No. 10-B/2021 was most recently updated with the Council of Ministers' Resolution No. 90/2021[21] of 7th July. The Resolution approved the *Plano 21/23 Escola* + (Box 2.3), which is an integrated plan for the recovery of learning loss caused by the lockdowns in the context of the pandemic. The Plan, which applies to basic and secondary education students, continues the applications of the provisions established by Resolution No. 53-D/2020, to the school year 2021/2022.

Box 2.3. 21|23 Escola+

The *21|23 Escola+* plan allocated more than EUR 900 million in response to school closures during the COVID-19 pandemic. The plan aims to recover learning losses with consideration to the unequal effects on different students. The two-year plan was developed in consultation with working groups who divided the plan into three hubs: ”Teaching and Learning”, ”Supporting Educational Communities” and ”Knowing and Evaluating” with the following objectives:

- recovery of the most affected skills
- diversification of teaching strategies
- investment in social and emotional well-being
- confidence in the educational system
- involvement of the entire educational community
- capacity building through increased resources and means
- monitoring, through the evaluation of the impact and efficiency of measures and resources.

Each hub has a number of domains, and each domain encompasses a number of specific actions. Within the hub of Teaching and Learning, Domain 1.6 Inclusion and Well-Being includes specific actions such as tutorial support, programs for social and emotional skills, personal, social and community development plans, school sports, and cultural and artistic programmes. The resources distributed under the plan are in addition to pre-existing structures and are part of a two-year plan, with the possibility for extension.

Source: Ministério da Educação [Ministry of Education] (n.d.[24])), “Governo Apresenta Plano 21/23 Escola+: Investimento de Mais de 900 Milhões de Euros para Recuperação de Aprendizagens” [Government Presents Plan 21/23 Escola+: Investment of more than EUR 900 Million for Learning Recovery], https://escolamais.dge.mec.pt/noticias/governo-apresenta-plano-2123-escola-investimento-de-mais-de-900-milhoes-de-euros-para (accessed on 7 September 2021); Eurydice (2021[25]), *National Reforms in School Education*, https://eacea.ec.europa.eu/national-policies/eurydice/content/national-reforms-school-education-53_en (accessed on 7 September).

Besides displaying a set of measures to support all students, Resolution No. 90/2021 increased the number of additional CHs schools can demand and that are determined by the above-mentioned formulae. The resolution establishes that the new formula for non-TEIP schools for the 2021/2022 school year is the following: CH = 8 x number of classes – 50% of the total hours stated in article 79 of the ECD.

Similarly, the resolution establishes that the new formula for TEIP schools for the 2021/2022 is the following: CH = 11 x number of classes – 50% of the total hours stated in article 79 of the ECD.

The distribution and management of the CHs are the same as described above.

Students who are beneficiaries from or applicants for international protection

Children and young people who are beneficiaries or applicants for international protection can benefit from specific measures that support their progressive access to the curriculum. These measures are selected depending on the student’s socio-linguistic profile and needs in terms of learning the Portuguese language. The total weekly workload defined in the national curriculum matrix is mandatory but it is possible to adopt a flexible management according to the pedagogical technical report defined by the EMAEI. The team is responsible for facilitating the welcoming and integration of these students into the school they are enrolled in.

To apply these measures, schools have a maximum time credit of 1100 minutes/week if the number of students covered is equal to or greater than six, and a maximum time credit of 550 minutes/week if the number is less than six. Students are accompanied by a teacher with training in Portuguese/PL2 or, alternatively, by a teacher from primary education (year 1 to year 4) or by a teacher with qualifications in foreign languages, or by a specialised technician with experience in teaching PL2 and/or experience in teaching Portuguese to foreigners. School psychologists, whenever possible, should articulate with the schools' class councils of teachers, or with the coordinators responsible for the dual certification courses if students are over 15 and follow a professional path.

Strengths

The framework regulating inclusive education is considered comprehensive and is widely known among most relevant stakeholders

As described previously, Portugal has a long history of promoting the integration of students with SEN into mainstream schools, which started in the 1970s (Costa and Rodrigues, 1999[26]; Nogueira and Rodrigues, 2010[1]). Inclusion has been even more prominently on Portugal's agenda since the 1990s and the country adopted the inclusive education terminology in 1994 with the Salamanca Declaration (Alves, 2019[2]). The Decree Law No. 3/2008 then defined specialised support for the inclusion of students with SEN in mainstream schools. However, since most of the focus of inclusion was on students with SEN, further efforts followed to include all diverse students in mainstream schools. This led to the implementation of Decree Law No. 54/2018 on inclusion.

While a broad vision of inclusion in education is still lacking in most countries worldwide, Portugal is among the countries who have inclusive education laws covering all learners (UNESCO, 2020[27]). Diversity and inclusion also permeate legal and policy documents and education programmes, such as the Decree Law No. 54 and 55, Students' Profile at the End of Compulsory Schooling, the National Strategy for Citizenship Education and the National Arts Plan, among others. This creates considerable comprehensiveness in the legal and policy realm around issues of diversity and inclusion. Overall, the framework regulating inclusive education is considered comprehensive and innovative by stakeholders. Other countries are looking to learn from Portugal how to design and implement policies for inclusive education. During the interviews, the review team also gained the impression that all stakeholders value the new law on inclusion and consider it a great strength in the education system. As Alves (2019, p. 872[2]) notes, "there seems to be a strong cultural commitment to inclusion in Portugal". Inclusion is considered a concept with a positive value (Nilholm, 2006, p. 436[28]), and there is a clear commitment from stakeholders and society to create better, more inclusive responses to all students within mainstream schools (Alves, 2019[2]; Alves, Campos Pinto and Janela Pinto, 2020[29]). This has created the necessary buy-in for the new law on inclusion and other related laws and policies.

The government conducted a broad consultation process to design the law on inclusive education and regularly consults different education stakeholders

The Decree Law on inclusive education (No. 54/2018) entered into force in 2018. As mentioned before, the legal framework for inclusive education (Decree Law No. 54/2018, with the amendments introduced by the Law No. 116/2019) establishes the principles and regulations that ensure inclusion as a process, according to which the education system must adapt to respond to the diversity of needs and capabilities of each and every student, through increased participation in the learning processes and educational community.

This law followed a rigorous evaluation process of the past ten years' policies and practices and a broad national consultation. In preparation, a working group was established which was composed of State

Secretaries and representatives from various organisations (e.g. Education, Inclusion of Persons with Disabilities, Health, Social Security, Employment, Schools Council, National Institute for Rehabilitation) (Alves, 2019[2]). These engaged with many stakeholders including academics, teachers and teacher unions, parent's associations, organisations for disabled persons and the general public. Public consultations on the draft law took place both in writing and through several open talks organised across the country (Alves, 2019, p. 866[2]). Nonetheless, despite efforts to consult a wide range of stakeholders, the OECD review team heard during its visit that some stakeholders were not consulted. This was for example the case of some Roma associations, although Roma students are among the groups who face the most significant challenges in education (see Chapter 1). While there remain gaps in this area, the OECD review team gained the impression that many stakeholders felt heard, although with different frequencies, and that the MoE expresses its openness and willingness to listen to a variety of actors to learn and work through feedback.

Another key example for consultations with stakeholders is the consensus-building that has taken place concerning the Students' Profile. Expert consultation, meetings with teachers, administrators and parents have all provided crucial information and created stakeholder buy-in. Critically, this process has also involved students themselves – from the youngest ages.

Portugal has also taken a strategic approach to communications about its reforms. An example of this is an event called Student Profile Day that was held on 15 January 2018. The event was well covered – with live streaming to every school in the country and a TV media partner who ensured that the event would be broadcast for viewing by the broader population. It is a considerable achievement that such an event made the national news. The broad and popular base of the panel involved on the day (a prominent Portuguese TV presenter, the national football team's coach, a well-known judge, a scientist, a journalist and a young pop star) gave the event a freshness and relevance. Most impressive, however, was the engagement and enthusiasm of students in schools across the country. Event organisers interviewed students watching the programme and asked them to contribute their thoughts (OECD, 2018[30]).

The new curriculum framework reflects broad citizenship and inclusive values while enabling schools to adapt to their local context

An inclusive curriculum[22] is key for putting the principle of inclusion into action within an education system (IBE, 2008, p. 22[31]). It refers to a curriculum that acknowledges and values students' differences and embraces diversity so that all students can experience an enriching school life. The importance of including diversity in the curriculum is broadly recognised (see Chapter 3). Evidence highlights, for example, that ethnic minority students who are taught on the basis of an inclusive curriculum show greater interest in education and adapt more easily to different environments (Cerna et al., 2019, p. 100[32]). Certain criteria must be met, the first of which is "to respect the linguistic and cultural capital of 'difference', taking its position in the curriculum and school culture and considering it an important factor for the psychosocial and cognitive development of the students" (Calogiannaki and al, 2018, p. 174[33]).

As described, in Portugal equity and inclusion of diversity in educational goals became central to all students, regardless of the reasons behind their disadvantaged situations. These goals permeate the recent curriculum documents developed by Portugal. As such, the 2017 Students' Profile, the main reference curricular document, is based on a set of broad principles, including the "Inclusion" and "Humanistic" principles. Besides the Students' Profile, other curriculum documents such as 2017 National Strategy for Citizenship and the 2018 Essential Learnings, came to strengthen and give coherence to Portugal's new priorities. In addition to the legislative framework, all guiding curricular documents, besides promoting learning, now promote core humanistic and inclusive values and require schools implement such a culture. Also, as mentioned in the previous section, these documents are the result of nation-wide debates and consensus, which, to some extent, seem to have established the legitimacy of this approach across the education system.

In addition, as in various other countries (Brussino, 2020[34]), the Portuguese education system offers the possibility to implement curricular adaptations to allow students with SEN and other students from diverse groups who might face significant barriers to access the curriculum. In fact, a recent OECD report indicates based on a survey to government officials that Portugal grants special provisions to the following groups within the curriculum: students with SEN, language learners, non-native speakers, immigrants students; students belonging to Indigenous communities or minority groups; gifted/talented students; socio-economically disadvantaged students; early school leavers or potential dropouts; and geographically disadvantaged students (OECD, 2021[13]).

Furthermore, the legislative order No. 5908/2017 increased school autonomy in curriculum management and flexibility. In the pilot phase of an autonomy and curriculum flexibility project in 2017/2018, 302 schools could adapt the curriculum to various learning needs and teachers could tailor delivery to make lessons more inclusive (UNESCO, 2020, p. 118[27]). The 2018 law for inclusion (both Decree Laws No. 54/2018 and 55/2018) formally offered all schools more autonomy to manage curricula (European Commission, 2019[35]). Inclusive curricula are flexible ones, involving interactive group work and allowing for curricular accommodations to facilitate access and learning and promote school success (O'Mara et al., 2012[36]; UNESCO, 2020[27]). Based on interviews with school staff, the OECD review team gained the impression that, although they were sometimes unsure regarding how to implement efficiently curriculum flexibility, most teachers valued the possibility of teaching interdisciplinary classes and adapt the content to make it more relevant to the school context and students' needs. Moreover, Portuguese schools have the possibility to implement curricular accommodations and adjustment to foster access and enhance outcomes of different student groups. As such, the Portuguese curriculum flexibility framework focuses both on processes and outcomes. It aims to implement inclusive teaching/learning strategies while improving the outcomes of all students, in particular those at risk of exclusion.

However, based on the interviews conducted, the review team formed the impression that there are restrictions and clearly defined rules in place regarding the curriculum. While schools and teachers can make some adjustments to the curriculum, they need to maintain national curriculum subjects. Therefore, curricular flexibility might be limited as low stakes assessment remains the same for all students in grades 3, 5 and 8 and high-stakes assessment in grades 9 and 12. As Alves, Campos Pinto and Janela Pinto (2020, p. 291[29]) note, "while the new policy has tried to align the message systems of curriculum and pedagogy, there is still some conflict at the level of assessment".

Levels of inclusivity are reported to be part of school assessment, and both schools and MoE are expected to develop indicators to monitor levels of inclusivity and success in implementing the current policy framework (see project with European Agency for Special Needs and Inclusive Education). Furthermore, a curriculum is part of the "message systems of schooling" and does not function in isolation (Alves, Campos Pinto and Janela Pinto, 2020[29]; Lingard, 2007[37]; Lingard and Mills, 2007[38]). An inclusive curriculum reflects what is meant to be taught (content) and learned (goals). It needs to be coherent with how it is to be taught (pedagogical methods) and learned (tasks), as well as with the materials to support learning (e.g. textbooks, computers) and the methods to assess learning (e.g. examinations, projects) (UNESCO, 2020, p. 112[27]). The review team nonetheless also gained the impression the curriculum might be compartmentalised and lack sufficient representation and consideration of the histories and experience of cultural and linguistic minorities in Portugal. In the way it is implemented, it might thus not be sufficiently inclusive and ensure that all students are part of the shared learning experiences in the classroom. These challenges are further developed in Chapters 3 and 4.

There are a significant number of programmes, structures and human resources available to support equity and inclusion in education

As mentioned before, Portugal draws on a wide range of national and European funding programmes to support students, such as the TEIP and the PNPSE. Under some of these programmes, schools can

design their own plans, or strategies, to promote inclusion and school success. In addition, municipalities can hire specialised staff (e.g. cultural mediator, therapist, etc.) and benefit from an increasing autonomy that allows them to apply for external projects or develop local ones with schools. As such, schools seem, to some extent, to receive extra human resources and support to train these human resources that are adapted to their needs. During the visit, the OECD review team gained the impression that schools that received additional resources through programmes, in particular TEIP schools, and those that participated in local projects were able to implement activities and practices which, while targeting all students, benefited to some vulnerable groups such as Roma students or students with an immigrant background. As described in this chapter, the system for funding inclusive education is being adapted in order to increasingly enable stakeholders at the territorial, local and school levels to design and implement their own inclusive initiatives. Allowing space and providing funding for local projects has proven to be effective for vulnerable student groups, even more so when the involve families and the broader communities (Rutigliano, 2020[39]; OECD, 2018[40]).

Furthermore, a significant amount of resources and funding are available to support students with special education needs. According to the Disability and Human Rights Observatory (*Observatório da Deficiência e Direitos Humanos, ODDH*) students with SEN still face significant challenges in the Portuguese education system, including discrimination, high dropout rates and low education attainment (Campos Pinto and Neca, 2020[41]). This, coupled with an increasing number of identifications, highlights the necessity of continually mobilising resources for these students. The OECD review team heard, for example, that in 2019/2020, there were nearly 7 769 special education teachers in Portugal. These special education teachers are moreover spread across various structures that specifically support the learning and the inclusion of students with SEN. Resources and structures available at the local and school levels to support these students, such as Resource Centres for Inclusion and multidisciplinary teams, are described in greater detail in Chapter 4 on school-level interventions.

Also, Portugal has implemented several programmes to support disadvantaged students and ensure equity in education, which is a prerequisite to build an inclusive education system (Cerna et al., 2021[4]). The School Social Assistance provides substantial support to students from low socio-economic backgrounds. Following the first lockdown due to the COVID-19 pandemic, the country made significant effort to distribute computers and internet connection to all students, while building on existing partnerships and structures to ensure the continuity of learning (OECD, 2020[42]). As mentioned in this chapter, Ordinances delivered in the past year and a half ensure the durability of these efforts.

In Portugal, socio-economically disadvantaged and other groups of vulnerable students are supported in various ways. Portugal is one of the seven European education systems which use socio-economic criteria in school admissions at primary level (European Commission/EACEA/Eurydice, 2020[43]). In the case of Portugal, the criteria aim to positively discriminate in favour of disadvantaged students and rank them for priority admission. The socio-economic admissions criteria include: a) beneficiaries of school social benefits whose parents/legal guardians reside in the catchment area of the intended school/school cluster; b) beneficiaries of school social benefits whose parents/legal guardians work in the catchment area of the intended school/school cluster; c) students who in the previous year attended pre-school education in private social solidarity institutions or the same school, in the catchment area of the intended school/school cluster (European Commission/EACEA/Eurydice, 2020[43]). Furthermore, schools in Portugal are considered to be best placed to understand the educational needs of their eligible students, though guidance may be provided (European Commission/EACEA/Eurydice, 2020[43]).

Challenges

The education system is still mainly orientated towards the inclusion of students with special education needs, with less focus on other dimensions of diversity

Inclusive education became a concept widely accepted as a necessary driver for educational policy starting with UNESCO's Salamanca Declaration of 1994. However, the Declaration was exclusively directed at students with special education needs. It is only recently that inclusive education began to be understood as a necessary process of change of an education system to reach and adapt to all students (Ainscow, 2019[44]). Today, many legislations across the world understand still conceptualise inclusive education as the inclusion of students with SEN. Portugal is among the few countries who have an inclusive education law reaching all students (UNESCO, 2020[27]).

While the Portuguese legal framework has broadened the scope of inclusive education to include all students, it is still understood by many stakeholders as the inclusion of students with SEN (now included in the administrative category of students in needs of support measures). This might stem from the decades of policy efforts on mainstreaming of students with SEN. In fact, there seems to be some resistance to the broadening of the concept of inclusive education. A 2019 study from the National Federation of Education (*Federação Nacional da Educação*, FNE) undertaken through a questionnaire distributed across the country to school staff found that slightly more than half of respondents (55%) did not agree with the extension of the scope of inclusive education. Even more (80%) thought that it is necessary to have a specific law for students with SEN (FNE, 2019[45]).

During the visit, the review team repeatedly heard that it is challenging to change mentality as the system is still orientated towards supporting students with SEN in different ways. For example, even though special schools were turned into Resource Centres for Inclusion, most of the staff are still professionals specialised on SEN. However, special education teachers are now considered specialist resources for schools, mainstream teachers and students (Alves, 2020[46]) and thus expected to support diverse students, beyond students with SEN. Furthermore, many interviewees mentioned the fact that the medical model of intervention for these students is still wide-spread and that specialised staff and teachers often do not fully understand how to apply the new approach to support these students. This too, was highlighted by the FNE (2019[45]) study. The review team also heard that multidisciplinary teams usually have special needs teachers as members, who also often serve as chairs, meaning that they can steer the focus on students with SEN (intentionally or unintentionally). Chapter 4 provides more details on the role, strength and challenges of multidisciplinary teams. Finally, teachers lack preparedness to deal with some dimensions of diversity, which is analysed in Chapter 3.

As a result of the composition of the multidisciplinary teams, students with an immigrant or ethnic minority background might be less of a priority and suffer from a significant lack of support due to a certain resistance and lack of preparedness in the education system. Nonetheless, Chapter 1 shows that a number of entities and organisations (such as ACM and Roma associations) promote the inclusion of ethnic minorities (particularly Roma communities) and students with an immigrant background. However, collaboration between MoE and some of these actors might be limited, for example in terms of consultation of legislative proposals (see earlier sections). During the visit, the review team also gained the impression that stakeholders focused particularly on students with SEN, while other diverse students were mentioned less frequently. In sum, while there is consensus on inclusion principles and the new inclusive education framework is broadly known, further efforts might be needed for educational staff to broadly acknowledge its scope and feel confident to implement it in schools.

There is a lack of clarity and coherence regarding the responsibilities for and administration of inclusion in education between different levels of governance

Portugal has initiated a process to transform its education system towards a more inclusive education system that can adapt and respond to the needs of all students. As such, most actors involved in the governance of the education system have a role to play in promoting equity and inclusion; a wide range of agents and institutions take responsibilities for and govern equity and inclusion in education. These include education authorities both at the national level (e.g. ministry of education and dedicated units within it) and at the sub-national level (e.g. municipalities, parishes) (Cerna et al., 2021[4]).

Besides the MoE, Portugal has several central actors involved in the management of inclusion in the Portuguese society. The Secretary of State for the Inclusion of Persons with Disabilities (*Secretária de Estado da Inclusão de Pessoas com Deficiência*) The Secretary for Integration and Migration (*Secretária de Estado para a Integração e as Migrações*), and the High Commissioner for Migrations (ACM) formed by the Observatory for Migrations and the Observatory for Roma Communities, are such actors. In particular, ACM, while focusing on broader inclusion, has various project that focus on the inclusion of students from an immigrant background and ethnic minority groups. ACM, in partnership with the DGE and the Aga Khan Foundation, manages for example a Network of Schools for Intercultural Education (R*ede de Escolas para a Educação Intercultural*, REEI) (ACM, DGE and AKF, 2020[47]). In spite of this variety of actors, the OECD review team formed the impression that, besides the REEI, collaboration between actors involved in the inclusion of students with an immigrant or ethnic minority background and the MoE is limited and punctual.

As much horizontal co-ordination (across the same level of the education system) as vertical co-ordination (across the different levels of the education system) are key to ensure inclusive education systems (UNESCO, 2020[27]). While in 2017 Portugal had the second highest most centralised education decision-making of OECD countries and economies (OECD, 2018[15]), since the Law 50/2018, of 16 August, there has been a decentralisation process going on for a few decades and intensified recently in Portugal. This process transfers new competencies from the government to the municipalities in different policy areas. In the area of education, municipalities will be able to decide over non-instructional aspects in non-tertiary education. However, they will still not have any responsibility regarding the management of teaching staff, the definition of curricular contents as well as school evaluation and assessment processes (OECD, 2020[48]). Overall decentralisation in education in Portugal is twofold, it aims to provide autonomy to municipalities to: (1) fund and manage school infrastructure and non-teaching staff from pre-primary to secondary education; (2) implement and apply to (national and international) projects that promote learning and inclusion and are adapted to the local context of their schools. This could, although to a limited extent, contribute to promoting responsive governance close to the needs of its citizens and efficient in its operation (Liebowitz et al., 2018[14]).

At the time of writing, 103 out of 278 municipalities in mainland Portugal have joined the decentralisation process, at least partially. The aim is that the process of decentralisation is completed for all municipalities by end of March 2022. Granting municipalities and schools autonomy and flexibility allows them to adapt the law of inclusion and other decrees to their local contexts. In addition, previous decentralisation measures have tended to focus on operational and administrative matters to improve efficiency, but recent curricular reforms and the PNPSE have adopted implementation models that centre on leveraging greater school autonomy to enhance educational outcomes. This may have helped develop greater capacity at school and local level to implement rapid responses to different challenges (OECD, 2020[49]). The 2 882 parishes (*freguesias*) in mainland Portugal also have important functions and flexibility in responding to the needs at the local level. They operate under municipal structures and parishes in some municipalities have been granted considerable responsibilities. This is the case, for example, in the Lisbon municipality where parishes play an important role in education by undertaking the maintenance of buildings, hiring non-teaching staff, organising study supervision and support, social support, extracurricular activities and

school holiday activities, providing meals and launching specific educational projects (Liebowitz et al., 2018[14]). Parishes can have a close relationship with school clusters for ensuring the payment of school maintenance and with parent associations, but it can vary.

However, some challenges remain as the process of decentralisation is rather slow and limiting as most areas (such as hiring and placement of teaching staff and the organisation of the school network) remain under the control of the MoE (Liebowitz et al., 2018[14]). The review team also heard that there is still variation across municipalities in terms of decision-making powers while the decentralisation process is underway.

Finally, at the regional level, Curriculum Autonomy and Flexibility (AFC) regional teams exist since 2018, but their role is unclear. These teams are composed by members from different organisms of the MoE (including IGEC) and aimed at supporting and monitoring the implementation of this curriculum autonomy and flexibility in all public schools. While other regional teams such as those monitoring the TEIP programme seem well connected to stakeholders in schools, the review team did not gain the impression during the visit that stakeholders were working closely with the AFC regional teams or were aware of them. While the schools visited by the review team presented outstanding examples of AFC management, the team formed the impression that support available for school leaders and teachers to implement AFC was limited. As a result, implementation of AFC on the ground might remain limited and its extent might primarily depend on the school leadership. Nonetheless, the review team acknowledges that AFC regional teams are fairly recent and that the COVID-19 pandemic might have limited their actions and impact.

There are significant challenges remaining regarding the management of available educational resources to support inclusion

In line with the precedent challenge, there seems to be also a lack of coherence and co-ordination of human resources. The review team has heard that there are nearly 7 769 special education teachers in the Portuguese system, which seems a considerable number for a small system. Nonetheless, a previous OECD review recommended that Portugal invested additional resources for special education teachers to support students in mainstream classes as special education teachers might not be evenly distributed across the country and were often on temporary, part-time contracts (Liebowitz et al., 2018[14]). Furthermore, since the focus in the system is on inclusive education of all students, the special education teachers in the system might not be used effectively to support all students. This also points to the need of training continuous professional learning of these teachers (see Chapter 3). Furthermore, mentioned before, the activities of the CRIs are still mainly focused on students with SEN and often promote a therapeutic approach. Although the law requires CRIs to support students in needs of additional measures, their function could be extended. As community organisations supporting schools, these centres could provide broader support to schools in order to help implement programmes and initiatives dedicated to the inclusion of all students. Resources and skills of these centres, as well as those of multidisciplinary teams (EMAEI), are currently not diversified enough to respond to the needs of all diverse student groups (see Chapter 3).

In terms of available resources and resource allocation, another challenge might lay in the capacity of some municipalities to provide additional resources for schools to promote equity and inclusion. The ongoing decentralisation process, which varies across municipalities might create some imbalances not only in terms of responsibilities and autonomy, but also in terms of funding. While there exist various national programmes to support equity and inclusion in education, municipalities can support schools by hiring additional non-teaching staff and implement educational projects relevant to their context. In addition, the decentralisation process gives municipalities more flexibility, including a less heavy bureaucracy in the use of their resources. They can also directly apply to European funds to support learning and inclusion in schools. This dynamic, while presenting some strengths described above, can also be problematic or at least two reasons: First, representatives from municipalities during the visit mentioned that education was

not always a priority at this level of governance. Second, although Portugal has reduced socio-economic inequalities between regions and is among OECD countries where they are relatively low (OECD, 2020[50]).The National Observatory for the fight against poverty (Observatório Nacional de Luta Contra a Pobreza, 2021[51]) recently highlighted that there are still significant socio-economic disparities across Portugal, both between regions and between municipalities within regions. This can lead to highly unequal support to schools across the country. In addition, during the visit, the review team gained the impression that parishes receive different amounts of resources, which depend on the central administration and even more on the municipality. This can further contribute to create considerable variation in terms of functions and funding.

Liebowitz et al. (2018[14]) already noted that "[t]he decentralisation processes in education may lead to undesired effects with respect to equity in education as a result of different capacity levels in schools across the country, if not accompanied by structures to support and monitor the process". In spite of these considerations, there is still a lack of comprehensive funding mechanism for equity and inclusion, as well as of accountability and monitoring structures. The review team heard about the lack of monitoring and evaluation culture in Portugal, which can create challenges to evaluate whether mechanisms and resources for inclusive education are effective (UNESCO, 2020[27]). The review team also gained the impression that there is lack of clarity at the local level about responsibilities for coordinating and monitoring what happens in schools. This makes it rather impossible to clearly establish resources and support allocated to the school being used to promote the inclusion and success of all students. It can also weaken governance, monitoring and accountability mechanisms and hinder the development of coordinated policies and a streamlined system. Stakeholders often demand more resources at the local level, but substantive evaluation and intervention strategies are often missing.

Short-term policy recommendations

Improve the governance of inclusive education through better synergies and accountability mechanisms between the different levels of the education system

Until recently Portugal has had a very high degree of centralisation though there has been a process of decentralisation underway which is meant to be completed by end of 2022. In this process, more responsibilities are delegated to municipalities and parishes. These responsibilities, which covered pre-primary and basic education, are now being extended to secondary education (Ministry of Education, 2022[3]), However, the responsibility for key matters such as hiring, placement and pay of teachers, responsibility for the curriculum (though some flexibility exists at the school level), national examination, selection and tracking policies and planning of the clusters remains under the jurisdiction of the central government (Liebowitz et al., 2018[14]). Overall, municipalities do not intervene on matters related to instruction or pedagogies. Even though the decentralisation process facilitates the hiring of non-teaching staff to provide more adapted responses to local needs, its scope is rather limited.

Furthermore, as the decentralisation process is still underway, there remains considerable variation in the extent of responsibilities but also capacities and funding across municipalities. This could reinforce existing inequity in education. A comprehensive strategy could help align all governance structures and balance responsiveness to local diversity with national goals (Liebowitz et al., 2018[14]; Burns and Cerna, 2016[52]). While Portugal has a strong central level with an increasing decentralisation to municipalities, support structures are lacking to connect and coordinate between the different levels of the education system. However, according to Decree Law No. 21/2019, which establishes the final framework for the transfer of responsibilities from central education authorities to municipalities and inter-municipal education entities, a national Commission to follow-up on and monitor the decentralisation process must be created. Specifically, the Commission is required to: (1) be well connected to local authorities and monitor the development of the transferred responsibilities; and (2) suggest measures to reach the objective of

decentralisation. It is composed of central educational authority representatives and school leaders. Nonetheless, the review team did not gain the impression that such a Commission was in place.

More broadly, support structures around schools could help schools implement inclusion initiatives (see Chapter 4). These might provide a link between the central level and the clusters of schools. Although some intermediate support structures are in place, the review team formed the impression that these are not efficiently acting to inform local actors, monitor the decentralisation process and support the implementation of inclusive education in schools.

In Portugal, there are AFC regional teams in place but stakeholders might not be aware of them and their impact might be still limited. Other regional teams from the MoE focus on monitoring TEIP programme or PNPSE programmes; they support and provide close contact with schools to help them make the necessary adjustments to their commitments and methodologies to improve school achievement. There also regional teams from DGEstE who focus on administrative matters, supporting school as well as municipalities. Portugal might consider increasing the awareness of AFC regional teams among stakeholders, expanding their function and increasing their numbers to cover inclusive education more broadly. The Inspectorate (IGEC) could also be instrumental in supporting schools to implement inclusion policies and initiatives. The review team heard during interviews that a central role of IGEC is to identify good practices that need to be generalised to the whole system, while keeping in mind the need for diverse approaches depending on the school context. As such, it seems that IGEC adopts an improvement-orientated approach. However, during the visit, the review team gained the impression that the Inspectorate tends to focus on legal and bureaucratic matters. Therefore, there might be room to strengthen the role of the Inspectorate to support schools in the implementation of inclusive education. By adapting its evaluation framework and embracing concepts of equity and inclusion, IGEC offers a great potential to become an intermediate support structure connecting central authorities to municipalities and schools. Finally, school clusters in Portugal can play a key role in providing support structures to schools.

A related point to autonomy and system coherence is the accountability system which is important for effective education governance and for nurturing innovation in education. It requires taking risks and depends on a culture of evaluation and improvement (Blanchenay and Burns, 2016[53]). To foster such a culture, an adequate understanding of the intended policy and ownership among all involved stakeholders is needed. With reforms increasing municipal autonomy, it is essential that there is a clear understanding of new responsibilities and roles played by local stakeholders. In addition, municipalities need to change their processes that they are able to compare between themselves (also in terms of data) and are able to conduct internal evaluations and react to local demands (Burns, Köster and Fuster, 2016[54]). Moreover, for the implementation of the new legal and policy framework on inclusive education to be effective, there is a need for consistent accountability and evaluation mechanisms.

As an intermediate support structure, the Inspectorate could also play an important role in increasing accountability. As mentioned, it recently modified its reference framework for evaluation by adding indicators to assess how the management of the school promotes the development of an inclusive education culture (OECD, 2020[55]). By taking a stronger improvement-based approach, IGEC could both identify good practices to inform the whole system and ensure accountability between the different levels of the education system. In other words, besides evaluating how schools are managing inclusion, it should ensure that (1) schools have the necessary support to comply with the inclusive education legal and policy framework and (2) school clusters and individual schools collaborate and share positive experiences in terms of equity and inclusion. The Inspectorate plays a supporting role for equity and inclusion in a number of education systems (see Box 2.4) which could provide an example for Portugal. Overall, Portugal might consider developing a culture of evaluation and fostering stronger accountability at the local level and between the different levels of government (more in Chapter 4). This will require promoting the understanding of new responsibilities of local stakeholders in the process of decentralisation, changing processes that enable conducting internal evaluations and strengthening the synergies between the different levels of the education system.

Box 2.4. Supporting schools through inspection: An example from the Czech Republic

In the Czech Republic, inclusive education is an ongoing priority of the Ministry of Education Youth and Sports (OECD, 2020[56]). The system allows for a high degree of school autonomy, and local level autonomy (OECD, 2018[57]) with steering from the central government through key policy documents and frameworks (OECD, 2020[56]). The Czech education system faces significant challenges in terms of equity and inclusion and is characterised by below-average levels of academic inclusion as measured by PISA 2018 (OECD, 2019[58]).

A key equity challenge of the education system is addressing issues of performance related to characteristics such as student and school socio-economic background. In order to address current equity and inclusion issues, the Czech School Inspectorate launched the Complex System of Evaluation (*Komplexní systém hodnocení*, 2017-22) project for the evaluation of the quality of education services and facilities. One goal of this project is to develop new tools that can support schools, such as sharing examples of good practice that are linked to inspection evaluation criteria, thereby building stronger ties between external and internal school evaluations. There is also the intent of better understanding the schools' socio-economic profile. Upon completion of the project, the Inspectorate will use the newly developed instruments both to validate learning outcomes, and as a means of ensuring that socio-economic and territorial considerations do not have a negative effect on school conditions, or on students' educational outcomes or access to educational pathways (OECD, 2019[59]).

In the Portuguese context, schools have a much lower degree of autonomy than Czech schools. Nonetheless, the Portuguese Inspectorate could adopt a similar approach to evaluation than the Czech Inspectorate. The new evaluation framework developed by IGEC, which includes several equity and inclusion indicators, could be part of a broader and more comprehensive system of evaluation which, among other objectives, would aim to develop new tools. These tools would be based on experience-sharing and support school clusters and individual schools in better understanding and implementing national policies as well as collaborating with each other.

Sources: OECD (2020[56]), *Education Policy Outlook: Czech Republic,* http://www.oecd.org/education/policy-outlook/country-profile-Czech-Republic-2020.pdf; OECD (2018[57]), "How decentralised are education systems, and what does it mean for schools?, https://dx.doi.org/10.1787/e14575d5-en; OECD (2019[58]), "*PISA 2018 Results (Volume I): What Students Know and Can Do",* https://dx.doi.org/10.1787/5f07c754-en; OECD (2019[59]), "*Education Policy Outlook 2019: Working Together to Help Students Achieve their Potential",* https://dx.doi.org/10.1787/2b8ad56e-en (accessed on 21 December 2021).

Sustain collaboration and consultation strategy efforts to broaden the understanding of inclusive education

Effective governance works through building capacity (see Chapter 3), open dialogue and stakeholder engagement (Burns and Cerna, 2016[52]). In the area of inclusive education, Portugal has been engaging with a variety of stakeholders through different collaboration and consultation strategies and these participatory governance mechanisms could be strengthened. This requires working with less active or less confident stakeholders to build capacity and empowerment to take part in the process (Burns and Cerna, 2016[52]; OECD, 2015[60]). It is also important to move beyond consultation to a higher level of engagement through collaboration or partnerships (OECD, 2015[61]) between MoE and other institutions. Such partnerships can help provide the necessary support and mechanisms to implement inclusive policies in schools.

For example, a number of entities and organisations (such as ACM and Roma associations) promote the inclusion of ethnic minorities (particularly Roma communities) and students with an immigrant background.

However, collaboration between MoE and some of these actors seem limited, for example in terms of consultation of legislative proposals such as the aforementioned Decree Law No. 54/2018 as well as partnerships between the entities. Consulting relevant stakeholders and collaborating with given institutions can increase buy-in in policy changes and build trust in the system for reforms and legislative changes in inclusive education (Burns and Cerna, 2016[52]; Ainscow, 2020[62]). There are already some examples of collaboration between the DGE and other entities, such as the aforementioned REEI and extended guidelines on how to implement inclusive education, including guidelines directed to the inclusion of some specific student groups such those from Roma communities (see Box 2.5).

Box 2.5. DGE Guidelines for schools to promote the inclusion of Portuguese Roma students

To help schools, ministries of education in partnership with academics and civil society can elaborate guidelines on how to design an inclusive school project, with a part focusing on Roma students. For instance, in Portugal, the DGE released in April 2020 an extended guide for schools to "promote the inclusion and educational success of Roma communities."

This guide gives detailed directives on:

- the welcoming of children, youths and adults
- the school network and the distribution of students
- educational modalities
- professional learning of teachers and other school staff
- the creation of an inclusive school atmosphere
- designing of an inclusive curriculum and orientation on pedagogical practices
- relations with the communities and the different stakeholders
- the use of intercultural mediators and "youth technicians"
- the monitoring and evaluation process.

Source: DGE (2019[63]), Pr*omover a inclusão e o sucesso educativo das comunidades ciganas - Guião para as Escolas [Promote the inclusion and school success of Roma communities – A Guide for Schools]*, http://www.dge.mec.pt/sites/default/files/ECidadania/Educacao_Intercultural/documentos/guiao_comunidades_ciganas.pdf (accessed on 23 November 2021).

Therefore, Portugal might consider going beyond guidelines and strengthening its collaboration and consultation strategies with a wider range of stakeholders and organisations (especially with Roma associations and associations supporting immigrants and refugees) to broaden the understanding of inclusive education and ensure that all students are sufficiently supported. This is also related to the need to build the capacity of stakeholders to assume their roles and deliver on their responsibilities so that policies and laws can be implemented effectively in schools and classrooms (Burns and Cerna, 2016[52]) (see also Box 2.6 and Chapter 3).

Box 2.6. Collaboration for Inclusion: an example from Pennsylvania (United States)

In the United States, the federal Department of Education passed the Every Student Succeeds Act (ESSA) in 2015 to expand equity for all students, including those from diverse groups such as ethnic minorities, non-English speakers, students with SEN, and students from a low socio-economic background. As part of this act, which maintained flexibility at the state and local level, each state created a State Plan that was required to include stakeholder input in the process of developing the plan. For example, the state of Pennsylvania fulfilled the ESSA requirement to collaborate and consult with stakeholders that were representative of the geographic diversity of the state, Indigenous groups, educators, educational leaders, parents and families, civil society groups, civil rights organisations serving diverse student groups, and the public (among others). Furthermore, the ESSA outlined guidelines for formatting communications, mandating that information be understandable, consistent, written or orally translated in a language understood by all parents, and provided in alternative formats for parents as required under the Americans with Disabilities Act.

The Pennsylvania Department of Education created a Stakeholder Engagement webpage with resources and data to support transparency around the process of creating the state plan. To engage a multitude of stakeholders from across the geographically large and diverse area, a database of stakeholder contact information was compiled. The initial draft of the state plan was posted in English and Spanish, and notice was sent to the press and across social media platforms, in addition to individually notifying stakeholders. Additional resources were also shared to help understand the plan. Multiple webinars and working groups were conducted, as well as online surveys. The working groups were also followed by a "Listening Tour", in which town hall meetings were held across the state to encourage public participation and feedback. Furthermore, consultations were made with research and policy experts for an understanding of best evidence-based practices. The feedback from consultations was collected, analysed, and published. In addition, the changes made to the state plan as a result of stakeholder input were posted on the Stakeholder Engagement Webpage.

While the stakeholder engagement for the creation of the state plan was conducted over six weeks, ongoing collaboration is ensured through the Community Schools Initiative, which, among other functions such as integrating health and social services, "Requires schools and partners to work together on data-driven planning, building relational trust, and sharing ownership for results with a focus on equity for all students" (p. 4). The Community Schools Initiative consists of the Pennsylvania Department of Education overseeing and facilitating efforts with the Pennsylvania Community Schools Coalition to ensure best practices in stakeholder participation and communications. Coupled with ongoing meaningful engagement with stakeholder groups, data transparency is necessary by providing disaggregated data on specific student groups and resources at the local and school levels. The understanding is that stakeholder input is intrinsically tied to accurate and up to date information. While these efforts focus primarily on equity, the structure and practices can still hold relevance for Portugal.

Source: Pennsylvania Department of Education (2019[64]), *Every Student Succeeds Act: Pennsylvania Consolidated State Plan*, https://www.education.pa.gov/Documents/K-12/ESSA/PennsylvaniaConsolidatedStatePlan.pdf (accessed on 15 November 2021).

Long-term policy recommendations

Improve the management of resources for inclusive education and continue efforts to build a coherent funding system to support equity and inclusion

There has been an increase in the total state budget dedicated to education, although the number of students is decreasing. The funding dedicated to some key measures for equity and inclusion (e.g. TEIP programme, psychology services, specialised teachers and technicians) has increased over the past five years. Also, the system for funding inclusive education is being adapted in order to increasingly enable stakeholders at local and school levels to design and implement their own inclusive initiatives, although within a limited scope. The process of transforming the funding system of inclusive education should nonetheless be strengthened.

Many funding sources exist for inclusive education at the national and European Union levels. However, there might be scope for greater co-ordination between the sources and clarity about the differences in accessing the funding and applying the two different funding formula. This would ensure that funding is equitably distributed and reaches schools and students that require support.

While the current resource allocation mechanisms give some potential for autonomy and flexibility for school clusters, they may still foster the labelling of students, hampered by a prevailing input approach based on students' individual difficulties. The multi-level approach Portugal is adopting to shift away from labels and support "students in needs of support measures" (universal, selective and additional) does not seem to be well-reflected in the funding system. The support provided by Resource Centres for Inclusion and special education teachers is primarily connected to the needs of individual students rather than aiming at building the capacities of mainstream teachers and the whole school. In this sense, some current mechanisms may be still inadequate to enable school clusters and teachers to assume responsibility for inclusive educational practices.

A related point is that there is a need for greater autonomy at community and school levels as well as flexibility within school budgets. This would enable a dynamic approach to the identification of learners' needs and the provision of adequate support measures. For learners with specific education needs, this is already in place to some extent, but it should be developed further and opened to all educational diversities. There are plans to give more responsibilities and competencies in the field of education to local agents (such as municipalities, schools and CRIs) in order to support a more inclusive system through a higher level of local autonomy in decision-making. Decisions regarding the implementation of educational support measures and funding allocation will be made through partnerships involving municipalities, schools, CRIs and other local organisations. They will also cover EU funding available to municipalities and metropolitan areas to support inclusive education (Ministry of Education, 2022[3]). Moreover, considering the key role of EMAEI in the identification of students in needs of additional measures and in the implementation of these measures, the funding allocated to these teams (e.g. extra credit hours, extra temporary or permanent staff) could be strengthened based on needs. This would imply the implementation of a continuous and consistent monitoring and evaluation strategy, which would involve education stakeholders at different levels of the system to assess school clusters and individual schools' needs as well as the efficient and transparent use of targeted funding.

However, greater autonomy granted to municipalities and school clusters in terms of funding could lead to greater variation between schools and municipalities. It is important that it goes hand in hand with strong co-ordination and accountability measures to ensure an equitable and inclusive education system.

Strengthen the management of system-level monitoring and evaluation of inclusive education

Monitoring and evaluation in Portugal is key for assessing the inclusiveness in the education system. Establishing system-level monitoring and evaluation frameworks to monitor the access, participation, achievement and well-being of all learners is fundamental to evaluate the progress of education systems towards reaching inclusion and equity goals and subsequently inform policies in these areas. This implies the design and consistent use of equity and inclusion education indicators and, as far as possible, monitoring student performance across specific groups (e.g. by gender, migrant status, special education needs, socio-economic or ethnic background) as well as across localities and regions authorities (Ainscow, 2020[62]; Cerna et al., 2021[4]). As required by Decree Law No. 54/2018, Portugal is currently making efforts towards the design and implementation of a comprehensive monitoring and evaluation strategy at the school level. The MoE is working with the European Agency for Special Needs and Inclusive Education on designing this strategy. Also, DGEEC is piloting new equity and inclusion indicators in some schools and will publish initial results in 2022.

It is challenging in Portugal to monitor student outcomes of diverse groups of students because of the limits regarding the collection of certain kinds of demographic data in the Constitution. Moreover, Portugal is moving away from labelling students, which has significant implications in terms of data collection (see Box 1.1.). Instead of data on students' background, DGEEC will collect data on students receiving support measures within schools. This suggest that school clusters and individual schools, in particular EMAEI and self-evaluation teams, will have a predominant role in the data collection process. They will also have to adapt their internal evaluation and data collection strategy. While it is still early to formulate clear guidance due to the new nature and specificity of the approach Portugal is adopting, the review team already suggests that DGEEC formulates clear guidance and provides support to relevant staff in schools. It should also continue its efforts to make data available to all and intelligible, as it is currently doing through, for example, online platforms.

In spite of these recent changes, as the OECD School Resources Review of Portugal previously recommended, *ad hoc* processes with the authorisation of the National Data Protection Commission could be explored to receive special permission to conduct analyses of outcomes for diverse groups. This could take the form of voluntary surveys, sophisticated sampling and imputation methodologies. Such an effort was undertaken to conduct the *Questionnaire within the Framework of the National Strategy for the Integration of Roma Communities* and similar efforts could be pursued for other groups (Liebowitz et al., 2018, p. 119[14]). Moreover, such initiatives could rely on the support of specialised national and local associations, who often have close relationship with the community, as well as researchers. For example, the review team noticed that several Portuguese universities have comprehensive projects on the inclusion of individuals with an immigrant background, often with a focus on education. While the MoE works with researchers to conduct, to some extent, programme evaluations, collaboration with research projects focusing on specific student groups might be limited.

Besides information on academic outcomes, Portugal is further encouraged to collect information on broader aspects of education quality, such as student attitudes, motivation and well-being and the overall teaching and learning environment in schools. As part of this effort, there should be consideration on how to best include in the national monitoring system the perceptions of stakeholders regarding the teaching and learning environment and, in particular, the ability of the education system to be inclusive. One option for doing this is to administer a national-level questionnaire to a sample of students, parents, school leaders and teachers in the system to collect views and perspectives about a range of aspects, including academic, psychological, physical, social and material well-being (Cerna et al., 2021[4]). Some punctual initiatives, such as the 2020/2021 monitoring of the PDPSC (part of the PNPSE) (Verdasca, J.; et al., 2020[19]), include socio-emotional and student behaviour indicators in certain schools. However, such indicators should be designed and used to monitor and evaluate education policies and initiatives at the system level.

Additionally, Portugal might consider systematically evaluating education programmes targeted at improving equity and inclusion in education (see Box 2.7). To facilitate the evaluation of programme effectiveness and impact on equity and inclusion in education, it is important that all new programmes have an evaluation component in their original design, including elements such as similar targets and baseline equity and inclusion indicators. Results should then be used to make strategic decisions about specific programmes, including discontinuation, adjustments, re-design and improvements to implementation (Cerna et al., 2021[4]). At present, the evaluation of policies and practices is not common in Portugal, where an evaluation culture might be missing so far. However, there are a number of promising practices in municipalities and schools across Portugal but most have not been evaluated. Evaluating such practices would help to assess whether they are effective and could be scaled up and adapted also in other municipalities and schools.

Box 2.7. Monitoring for inclusion: lessons from Ontario (Canada)

In Canada, the province of Ontario, as part of the Education Equity Plan, committed to regular evaluation of student outcomes disaggregated by diversity groupings, including immigration background, heritage language, ethnicity, special education needs, sexual orientation and gender identity (Ontario, 2017[65]). The approach to data collection is that student information is voluntarily provided, and the larger regional education department supports the collection process by local schools. In addition, data collection on representative diversity of teachers and staff is collected. The development of indicators was done in collaboration with local parents, students, staff and community groups, including special attention to relationships with Indigenous groups. Disaggregated data is to be reported by local school boards annually (Ibid). Furthermore, Ontario has designated an agency, the Education Quality and Accountability Office, to oversee data collection, assessments and reporting (EQAO, 2020[66]). Its own actions as an agency are monitored through policy performance targets, measures and analysis, which are included in an annual report that is published publicly. The results of the performance targets for the government agency were also published alongside a financial audit of the agencies' financial statements (Ibid). While equity is the main goal, the process of data collection and reporting can still be relevant to more inclusive systems.

Source: Ontario (2017[65]), *Ontario's Education Equity Action Plan*, http://www.edu.gov.on.ca/eng/about/education_equity_plan_en.pdf (accessed on 20 December 2021); EQAO (2020[66]), *Education Quality and Accountability Office*, http://www.eqao.com (accessed on 20 December 2021).

Such a significant cultural change will require building capacity in the Portuguese education system to use outcome-based approaches to guide the work (see Chapter 3). Following up on a previous OECD recommendation, Portugal could continue expanding partnerships with external researchers to deepen the empirical knowledge base on the Portuguese education system and its inclusiveness (Liebowitz et al., 2018[14]).

At the national level, the law of inclusive education specifies that a regular evaluation is required. As mentioned before, the MoE is currently working with the European Agency for Special Needs and Inclusive Education on developing indicators to monitor levels of inclusivity and success in implementing the current policy framework. This is an important step forward and could be accompanied also by the development of indicators at the school level. For example, it might be helpful for Portugal to consider documents such as the Index for Inclusion (Booth and Ainscow, 2011[67]) and the Guide for Ensuring Inclusion and Equity in Education (UNESCO, 2017[68]), which provide useful tools for developing monitoring systems that take into account the voices of stakeholders involved (including teachers and students) (Alves, Campos Pinto and Janela Pinto, 2020[29]). The Inspectorate could play an important role here too (see Chapter 4).

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Annex 2.A. Funding system of teaching and specialised staff

Resources	Funding source	Notes/criteria/reference
Teachers	State budget	Applications are submitted by schools to the Directorate-General for School Administration (DGAE) online platform. They must be validated by Directorate-General for Schools (DGEstE) and the subsequent placement is made by DGAE. Specific cases covered by the legal framework: Replacement due to retirement or illness. Application of article 79 of the Teaching Career Statute. Completion of the teaching staff established and published by DGAE. Increase in the number of students and their difficulties and potential. Expansion of the skills of the Learning Support Centre. Each school cluster/school has a table with the number of teachers defined for each recruitment group and published by the DGAE. A network for hiring special education teachers is authorised annually. The network is based on data from monitoring carried out by the Directorate-General for Education and Science Statistics (DGEEC). Applications are analysed on a case-by-case basis considering the resources that already exist in the school clusters/schools and the reasons given for the reinforcement of their specialised staff.
Specialised technicians	State budget Human Capital Operational Programme (POCH/FSE): Of the total number of psychologists placed in schools, 300 are financed by the FSE because of an application submitted by the DGEstE to the POCH (see Annex 2.B).	The request for resources to be allocated to the school clusters/schools is annually submitted by schools and is analysed by the regional and central services of DGEstE. In its decision, DGEstE takes into account DGEEC data, the reasons presented by schools and data gathered through its continuous outreach work carried out with schools. Networks for the renewal/hiring of specialised technicians are authorised annually. The approval is subject to the following criteria: number of students (DGEEC data) number of technicians already placed in the school requests for mobility, retirements, contract terminations, etc. school clusters with high performance support units agricultural Professional Schools schools located in areas not covered by Resource Centres for Inclusion (CRIs) reference schools for Bilingual Education and for low vision

Resources	Funding source	Notes/criteria/reference
		case-by-case analysis of requests for reinforcement. In addition to the aforementioned networks, the schools have technicians who are already part of the framework, for example, through the old regional liaison boards (psychologists) and PREVPAP (programme for the extraordinary regularisation of precarious ties in the Public Administration). They can also contract through hourly credits as provided for in Normative Dispatch No. 10-B/2018, of 6th July and/or through application to the Personal, Social and Community Development Plans. During the 2019/2020 school year, under the PREVPAP, technicians who met the requirements provided for in the law were integrated into the school staff. In this way, many schools now have their own staff, and therefore permanently, specialised technicians.
Specialised technicians who are part of Personal, Social and Community Development Plans (PDPSC)	POCH/FSE	Notice published for submission of application with reference to the criteria for attribution
Operational assistants	State budget	Criteria established by Ordinance No. 272-A/2017, of 13th September, amended by Ordinance No. 245-A/2020, of 16th October and by Ordinance No. 73-A/2021, of 30th March: Number of students; School spaces/facilities; Educational/training offer; Operating regime; Students with reduced mobility and severe limitations in terms of personal autonomy that imply the mobilisation of specific resources, duly substantiated by the respective Multidisciplinary Support Teams for Inclusive Education, except for those supported by the Learning Support Centre within the scope of support services specialised and structured teaching, are accounted for at 2.5 in all teaching cycles, including pre-school education, for the purposes of calculating the total number of students, per educational establishment; In pre-school education, the needs for additional support to mobilise specific health care and to promote levels of participation in different learning contexts are analysed, on a case-by-case basis, at the beginning of each school year, by joint order of the members of the Government responsible for finance and education; Two operational assistants if the Learning Support Centre supports structured teaching; Two operational assistants if the Learning Support Centre welcomes the specialised support valence; Reference schools in the field of vision and reference schools for bilingual education have an additional operational assistant for each of these educational responses; In clusters of non-grouped schools or schools that are part of educational territories of priority intervention, there are two operational assistants at the main school.
Resource Centres for Inclusion (CRIs)	State budget	The accreditation process is independent of the funding process, although it its mandatory. The global amount is stipulated by a Resolution of the Council of Ministers and the financing is based on the terms provided for in the respective Ordinance. Schools establish partnerships with CRIs by drawing up action plans based on the support they identify as necessary and the specificities that each one offers.

Resources	Funding source	Notes/criteria/reference
		The financing aims to support the support recommended in the action plans.
Education and Training Integrated Programme (PIEF)	State budget	A network of local intervention technicians (TIL) is centrally annually authorised. These technicians are assigned to all school groups that have PIEF classes and do not have this resource in their framework. The allocation does not require a request by the schools.
Specialised technicians outside the school.	State budget	Special education allowance awarded to families by Social Security. The subsidy is awarded upon presentation of a medical document and when support does not exist in the school the student is enrolled in (all requests are supported by data from DGEstE).

Source: Ministry of Education (2022[3]), *OECD Review of Inclusive Education: Country Background Report*.

Annex 2.B. The Human Capital Operational Programme (POCH)

The Human Capital Operational Programme *(Programa Operacional Capital Humano*, POCH) was the main funding instrument of Portugal 2020 in the area of human capital. The Programme was aligned to the priorities of the 2020 European Strategy (Intelligent and Sustainable Growth) and to those of the Portuguese National Reform Programme. POCH, which started in 2018 and are still ongoing aims to contribute to strengthening the qualifications and employability of Portuguese people. It is co-funded by the European Social Fund (ESF) and the National Public Counterpart (*contrapartida pública nacional*). The Programme covers the primary, secondary and tertiary levels, and targets the regions of Portugal Mainland that have the lowest level of development (i.e. North, Centre and Alentejo). The Directorate-General for Schools (DGEstE) is the Beneficiary Responsible for the Execution of the National Public Policies. As such, it is the entity that submits applications and manages the POCH/FSE funds. It is responsible for the implementation and for follow-up and monitoring in order to respond to the requirements established by the POCH and by audits.

POCH has five priority areas: (1) the promotion of school success, fight against school dropouts and absenteeism, and strengthening of young people's skills for their employability; (2) the strengthening of higher education and advanced training; (3) lifelong learning and skills, and strengthening of employability; (4) quality and innovation of the education and training system; and (5) technical assistance. The main strategy adopted to tackle the challenges of the first programme's area of priorities mentioned above is the strengthening of the network of school psychologists. This aims to establish diagnoses of difficulties that affect learning to be able to act on time, analyse reasons for school failure and implement appropriate measures to promote school success, including adequate educational and professional guidance. Psychologists perform their functions in selected schools under the General Law on Labour in Public Functions, approved by Law No. 35/2014, 20 June, and Decree Law No. 132/2012, 27 June, with the changes introduced by Decree Law No. 83-A/2014, 23 May. However, under the terms provided for in the Guidance Document - Monitoring and Evaluation of European Cohesion Policy - European Social Fund, the students do not directly benefit from the operation. Since support is provided for the reinforcement of the services provided by psychologists at the service of schools, this service is directed to the generality of the students who attend the same.

Annex Table 2.B.1 shows that, as of December 2019, the total POCH funding was EUR 3.6 million. The first priority area had the highest share of total funding (55%), total approved eligible investment (63%), total validated spending (63%) and payment (63%).

Annex Table 2.B.1. Total funding, total eligible investment, total validated spending, payment, by POCH priority areas (2019)

Areas	Designation areas	Total funding (M EUR)	Total approved eligible investment	Total validated spending	Payment
1	Promotion of school success, fight against school dropouts and absenteeism, and strengthening of young people's skills for their employability	2 004 706	2 153 292	1 392 757	1 486 164
2	Strengthening of higher education and advanced training	614 118	668 633	570 301	582 986
3	Lifelong learning and skills, and strengthening of employability	845 882	448 058	250 723	232 219
4	Quality and innovation of the education and training system	117 647	89 973	47 759	53 439
5	Technical Assistance	59 802	32 514	18 210	19 331

Source: CNE (2020[18]), *Estado da Educação 2019*, https://www.cnedu.pt/pt/publicacoes/estado-da-educacao/1615-estado-da-educacao-2020 (accessed on 9 November 2021).

Notes

[1] See: https://dre.pt/pesquisa/-/search/403296/details/maximized (accessed on 14 December 2021).

[2]See:https://www.portugal.gov.pt/download-ficheiros/ficheiro.aspx?v=%3d%3dBAAAAB%2bLCAAAAAAABACzsDA1AQB5jSa9BAAAAA%3d%3d (accessed on 16 November 2021).

[3] See: https://cidadania.dge.mec.pt/sites/default/files/pdfs/national-strategy-citizenship-education.pdf (accessed on 17 November 2021).

[4] In 2015, all United Nations Member States adopted the 2030 Agenda for Sustainable Development, which contains 17 goals, The Sustainable Development Goals (SDGs). The SDGs are common goals to be reached by 2030 that "recognise that ending poverty and other deprivations must go hand-in-hand with strategies that improve health and education, reduce inequality, and spur economic growth – all while tackling climate change and working to preserve our oceans and forests." See: https://sdgs.un.org/goals.

[5] See: https://www.dge.mec.pt/aprendizagens-essenciais (accessed on 05 September 2021).

[6] See: https://www.dge.mec.pt/programa-integrado-de-educacao-e-formacao (accessed on 17 November 2021).

[7] See: https://www.dge.mec.pt/ensino-distancia (accessed on 17 November 2021).

[8] According to the International Bureau of Education of the United Nations Educational and Scientific Organisation (UNESCO), b-learning (blended learning) corresponds to "structured opportunities to learn which use more than on teaching or training method, inside or outside the classroom, through which at least part of the content is delivered online. (…) More commonly, blended learning refers to a combination

of face-to-face teaching and technologies. (…)". See: http://www.ibe.unesco.org/en/glossary-curriculum-terminology/b/blended-learning (accessed on 17 December 2021).

[9] See: https://www.dge.mec.pt/percursos-curriculares-alternativos (accessed 17 November 2021).

[10] Cf. Article 12 of Ministerial Implementing Order No. 223-A / 2018, of 3rd August, https://dre.pt/application/file/a/115879412 (accessed on 14 December 2021); Article 11 of Ministerial Implementing Order No. 226-A / 2018, of 7th August, https://dre.pt/application/file/a/115941797 (accessed on 14 December 2021); and Ministerial Implementing Order No. 235-A / 2018, of 23rd August, https://dre.pt/application/file/a/116154435 (accessed on 14 December 2021).

[11] Article 73, par. 2 of the 1976 Constitution of the Portuguese Republic:https://www.parlamento.pt/Legislacao/Paginas/ConstituicaoRepublicaPortuguesa.aspx (accessed on 3 September 2021).

[12] The division of Portugal Mainland in five statistical continental regions is referred to as Statistical Territorial Units Nomenclature (*Nomenclatura das Unidades Territorias Estatísticas*, NUTS). To learn more about NUTS, see (in Portuguese): https://www.dirportugal.com/regioes-de-portugal/ (accessed on 17 December 2021).

[13] See: http://www.programaescolhas.pt/apresentacao (accessed on 14 December 2021).

[14] https://pnpse.min-educ.pt/ (accessed on 14 December 2021).

[15] https://www.pna.gov.pt/ (accessed on 14 December 2021).

[16] See: https://www.dge.mec.pt/pcdd/docsreferencia.html (accessed on 7 September 2021).

[17] Liebowitz et al. (2018[14]) differentiate between current expenditures and capital expenditures. Current expenditures refer to the costs of running the day-to-day operations of schools and the education system at its different levels of governance. It includes costs incurred by teaching and learning activities, teachers' and other educational staff's salaries and other operating costs. Operating costs refer to expenses associated with the maintenance and administration of a school (e.g. heating, electricity, small repairs, perishable instructional materials, equipment that lasts for less than one year, etc.).

Funding for capital expenditures covers spending on assets that last longer than one year. It includes funds for construction, renovation or major repairs to buildings as well as new or replacement instructional and non-instructional equipment.

[18] See: https://dre.pt/web/guest/legislacao-consolidada/-/lc/117105579/view?p_p_state=maximized (accessed on 10 September 2021).

[19] The Educational Charter is a municipal instrument that established the local strategy for education. The Educational charter programs, for a ten-year time horizon (with interim reviews, whenever justified), the educational supply networks of pre-school education, primary and secondary education, including special modalities of education and extracurricular education. This Charter reflects the municipal strategies adopted to reduce early school leaving and promote the school success of all students.

[20] Article 79 of the Statute of the Career of Early Childhood Educators and Teachers of Basic and Secondary Education, ECD (Law n°. 14-B/90) establishes the conditions for the reduction of teacher's working hours in the 2nd and 3rd cycles, secondary education and special education. For example,

paragraph a) indicates that the weekly teaching time of a teacher can be reduced by two hours if the said teacher has reached 50 and 15 years of teaching service.

[21] See: https://dre.pt/home/-/dre/166569087/details/maximized (accessed on 10 September 2021).

[22] The International Bureau of Education defines an inclusive curriculum as one that "takes into consideration and caters for the diverse needs, previous experiences, interests and personal characteristics of all learners. It attempts to ensure that all students are part of the shared learning experiences of the classroom and that equal opportunities are provided regardless of learner differences" (IBE, 2008[31]).

3 Developing capacity for diversity, equity and inclusion

This chapter examines the policy area of developing capacity for promoting diversity, equity and inclusion in education in Portugal. Three broad aspects are analysed: building awareness of diversity in education; initial teacher preparation and continuous professional learning; and recruitment, retention and evaluation of teachers. Recently, Portugal has implemented progressive measures aimed at addressing diversity among students and providing support for teachers and broader personnel to develop and improve their professional practice through initiatives such as the National Strategy for Citizenship Education (ENEC), the National Strategy for Equality and Non-Discrimination (ENIND), the National Roma Communities Integration Strategy (ENICC), and Teacher Training Centres affiliated to school clusters that provide tailored professional learning. However, important challenges remain, including inadequate continuous professional learning for diversity, equity and inclusion and a narrow view of diversity largely focused on students with special education needs (SEN). This chapter makes several policy recommendations to address these challenges.

Context and main features

Building awareness of equity, inclusion and diversity in education

In the past few years, Portugal has implemented progressive measures aimed at addressing diversity in education both at the systemic (societal) level and among its student body. One of these measures is the National Strategy for Citizenship Education (ENEC), which was introduced in 2017. The ENEC aims at improving the societal values and competencies that contribute to active and informed citizenship to foster the attainment of a more secure, fair, sustainable and inclusive society. Furthermore, the legislation enacted under the Decree Law No. 55/2018 states that "the programme of the 21st Constitutional Government assumes as a priority the implementation of an educational policy with a people-centred approach, which ensures equity in the access to public education, therefore promoting educational success and equal opportunities for all".

Therefore, citizenship and developmental education seek to develop a broad range of active citizenship competencies in students, which are deemed essential for young people to acquire before they turn 18. The ENEC proposed the mandatory creation of school-based strategies geared toward the implementation of a specific curricular component on Citizenship and Development. In order to provide clear guidance regarding content and focus of Citizenship Education, the ENEC specified different domains of Citizenship Education, split into three categories: i) (domains) mandatory for all grade levels of compulsory education (Grades 1 through 12); ii) domains that should be taught in at least two levels of primary and lower secondary education (Grade 1 through 9); and iii) optional domains. Table 3.1 shows the three broad categories into which the curriculum on Citizenship and Development is organised, as well as the specific themes/areas that fall under each category.

Table 3.1. Citizenship Education curriculum in Portuguese schools

Mandatory courses for all levels of education (Grades 1 through 12)	Courses taught at two levels of primary and lower secondary education (Grades 1 through 9)	Optional courses (any school grade level)
• Human Rights • Gender Equality • Interculturality • Sustainable Development • Environmental Education • Health	• Sexuality • Media • Institutions and democratic participation • Financial Literacy and Consumer Education • Road Safety • Risk	• Entrepreneurship • Labour World • Security, Defence and Peace • Animal well-being • Volunteering • Other

Source: Ministry of Education (2022[1]), *OECD Review for Inclusive Education, Country Background for Portugal*.

The ENEC derives from and draws on the Students' Profile by the End of Compulsory Schooling Act (see Chapter 2 for a detailed account of the Students' Profile). The Students' Profile document underlines the principles and a humanistic-based vision on which educational action should be based as well as the values, competencies and areas to be developed by young people at the end of compulsory schooling. Some of the values that students should develop are inclusion, sustainability, responsibility and integrity, curiosity, reflection and innovation, and freedom. Most of these values are reflected in the ENEC. It is

important to highlight that ENEC objectives embrace a whole-school approach. The fact that the Students' Profile, Decree Law No. 55/2018 on Curricular Flexibility, Decree Law No. 54/2918 on Inclusive Education and the ENEC draw on each other and are complementary indicates a clear commitment by Portugal to focus the education system on the development of these competencies. However, the attainment of these principles and values requires the commitment of the whole school, teachers, families and parents, and education leaders.

The citizenship education curriculum comprises 17 domains. Among the compulsory courses for all schools, each grade has course objectives, which are highly relevant for diversity, equity and inclusion, including: Sustainable Development, Human Rights, Gender Equality, Interculturality, Environmental Education and Sexuality. These topics align with the United Nations (UN) Sustainable Development Goals and the growing popularity of global Citizenship Education (Andreotti, 2010[2]; Peck and Pashby, 2018[3]).

With the introduction of this law, Citizenship Education has been implemented in all public and private schools in Portugal. An important consideration is the fact that the Portuguese government tied the implementation of Citizenship Education to the curriculum's autonomy and flexibility (Decree Law No. 55/2018). This gives schools the freedom to manage up to 25% of the curriculum, enriching and deepening the disciplinary essential learning, which fosters interdisciplinary and collaborative work, problem-based learning and deeper learning tailored to the specific context of schools (see Chapter 2 for further details on curriculum autonomy and flexibility). What remains unclear is whether or not teachers adopt a critical approach to teaching Citizenship Education. In order to accomplish its purpose, Andreotti (2006[4]) admonishes that a critical approach rather than a soft approach to teaching Citizenship Education must be adopted (see Box 3.1 for the distinction between a soft and critical approach to teaching Citizenship Education). The crisis brought about by the COVID-19 pandemic has interfered with the implementation of this policy. It remains to be seen what the actual impact of this programme will have on students.

Box 3.1. Citizen Education vs. Global Citizenship Education

The Citizenship Education pursued by Portugal is similar to what has been called Global Citizenship Education (GCE). GCE has recently gained popularity in response to the perceived failures of education systems to address the complexities of globalisation and meet the programme of human rights, freedom, democracy and global justice. One of the key challenges in teaching Citizenship Education is the tendency to adopt a "soft approach" in terms of teaching and content, which has been the dominant paradigm. Andreotti (2006[4]) distinguishes between "soft GCE" and "critical GCE." Soft GCE approaches the subject from the perspective of "otherness",[1] whereas critical GCE addresses how we are all part of the problems the world faces yet also part of creating solutions. Andreotti's framework provides tools that help teachers and students to develop reflective ethics that engage with various differences, complexities and systemic injustices. It provides a paradigm shift and pushes students to recognise when they are assuming a universal view of the world that is in fact a reflection of their own experience and culture. While not prescriptive, it is a useful resource to engage teachers and students more critically in questions of global importance, such as addressing the economic and cultural roots of inequalities in power and wealth/labour distribution in a global world, promoting an ethical relationship to difference and addressing power relations.

Andreotti (2006[4]) points out the importance of power, voice and difference in critical Citizenship Education. She underscores the need to provide opportunities for students to analyse their own position, identities, attitudes and power relations within entrenched societal structures of power and privilege. This can be done through critical literacy. Engaging students in critical literacy provides the space for students to reflect on their own assumptions and ask the question how they came to "think, be, feel,

and act" the way they do and the implications of their systems of belief in local and global terms as well as their relations to power, social relationships, and the distribution of labour and resources" (p. 49[4]). In a real classroom situation, this means teachers enacting a curriculum that develops students' critical thinking and empathy – two important skills which are often not core learning objectives within school curricula.

Source: Andreotti, V. (2006[4]). Soft versus critical global Citizenship Education. Development Education, Policy and Practice, 3, 83–98.", https://doi.org/10.1057/9781137324665_2.

The Portuguese Government has approved Resolution No. 61/2018 of 21 May, implementing the National Strategy for Equality and Non-Discrimination (*Estratégia Nacional para a Igualdade e Não Discriminação – Portugal + Igual*, ENIND), for the period covering 2018-2030. This National Plan addresses three main domains: equality between women and men (*Igualdade entre Mulheres e Homens*, IMH); violence against women, gender violence and domestic violence (*Violência contra as Mulheres e Violência Doméstica*, VMVD); and discrimination on the grounds of sexual orientation, gender identity, transgender and sexual characteristics (*Orientação sexual, Identidade e Expressão de género, e Características sexuais*, OIEC).

In relation to IMH, the main goals of this Plan are to address the gender dimension at all levels of public governance. The Plan also aims to: i) further promote gender equality in access to education; ii) fight gender stereotypes in the field of access to health services; iii) eradicate gender stereotypes in communication and media; and iv) integrate the gender dimension in the fight against poverty and social exclusion. The second plan, VMVD, aims to: i) prevent and eradicate social tolerance towards violence against women and domestic violence by promoting a culture of non-violence and tolerance; ii) enlarge the protection already granted to the victims of such violence; iii) fight practices such as genital mutilation and forced marriage involving children. The third plan, OIEC, intends to promote the mainstreaming of non-discrimination issues related to LGBTQI+ (Lesbian, Gay, Bisexual, Transgender, Queer, Intersex, etc.) individuals and fight all forms of violence based on the OIEC.

Enshrined in Law No. 38/2018, the legislation aims at fighting discrimination based on sexual orientation, gender identity and expression, and sexual characteristics in governance at all levels and domains. Among others, this law seeks to attain the following:

1. Preventing and combatting discrimination based on gender identity, gender expression or sexual characteristics.
2. Identifying and intervening in situations where children and young people manifest gender identity or gender expression that is not identified with the sex attributed at birth.
3. Protecting gender identity, gender expression and sexual characteristics against all forms of social exclusion and violence in schools; ensuring respect for the autonomy, privacy and self-determination of children and young people who experience social transitions of gender identity and expression.
4. Providing training for teachers and other professionals in the education system concerning issues related to gender identity, gender expression and the diversity of sexual characteristics of children and young people, with a view of their inclusion as a process of socio-educational integration.

The recent publication "The fifth review of the implementation of the Beijing Platform for Action in the EU [European Union] Member States" of the European Institute for Gender Equality noted that, since the adoption of the law in Portugal, there has been an increase in the proportion of women in companies. In particular, it highlighted an increase of women in the boards of listed companies from 12% to 18%, from 28% to 32% in state companies, and from 20% to 32% in local public companies. Another law adopted in March 2019 requires that at least 40% of top civil servants in public administration and staff in public higher

education institutions and associations are women (European Institute for Gender Equality, 2020[5]). This national agenda is directly reflected in the ENEC programme with a specific focus on gender equality. The ENEC provides educational materials and programmes for teacher training.

While there have been significant improvements in raising awareness on issues related to gender, gender identity and sexual orientation, gaps remain in relation to ethnic groups and national minorities. In particular, there seems to be persistent discrimination against Roma people in Portuguese society (see Chapter 1). The recent report of the European Institute for Gender Equality suggests that over half of Roma women (52%) in Portugal reported discrimination with only 4% having reported the latest incident (European Institute for Gender Equality, 2020[5]). Despite progress in recent years, there remain high levels of discrimination, poverty and social exclusion for many Roma people and families, as well as continued lack of awareness and mistrust between Roma and non-Roma people (Ministry of Education, 2022[1]).

The Portuguese National Strategy for the Integration of Roma Communities (*Estratégia Nacional para Integração das Comunidades Ciganas, ENICC*) was created to bring about improvements to the overall situation of Roma communities and promote their inclusion within Portuguese society, including by encouraging communication and positive interaction, and deconstructing stereotypes. The first Strategy was established for the 2013-2020 period (Council of Ministers' Resolution No. 25/2013, of 27 March). It followed a call made by the European Commission (EC) that led to the creation of the 2011 Framework for the National Integration Strategies (NRIS), which complements the Racial Equality Directive (No. 2000/43/EU). Countries were then encouraged to develop and implement their own NRIS in order to foster the inclusion of Roma communities within their borders (Rutigliano, 2020[6]). The Portuguese Strategy was published following consultation processes involving all ministries, civil society organisations, Roma communities and experts. Besides the four main areas proposed by the EC 2011 NRIS – housing, education, health and employment, – the Portuguese ENICC added crosscutting pillars in order to address issues like discrimination, mediation, citizenship, gender equality, Roma history and culture. The ENICC included a total of 40 priorities, 105 measures and 148 goals to reach by 2020.

The ENICC monitoring process has shown the need to introduce changes, both to the strategy's definition – particularly in relation to the clarification and implementation of measures – and in the identification of priority intervention areas – particularly gender equality, knowledge on Roma people and their participation in the implementation process of the next ENICC. The Government has therefore decided to review the ENICC to adjust its objectives, targets and, consequently, to enhance its impact on improving the situation of Roma communities. The priority is to improve inclusion in education and training and the workplace as well as the overall living conditions of Roma people, and to recognise and boost interventions in intercultural mediation, improve information and knowledge, and combat discrimination (Ministry of Education, 2022[1]).

Along the same lines, the new strategy will aim to place the relevance of Roma inclusion higher in the political and public agenda, and to coordinate the different sectors that promote it, in particular by highlighting the central role of local policies in integrating vulnerable Roma populations. The Council of Ministers Resolution No. 154/2018, of 29 November, approved the revision of the National Roma Communities Integration Strategy 2013-2020 by extending it until 2022. The revised ENICC is in line with other national strategies, such as the National Strategy for Equality and Non-Discrimination 2018-2030 (Ministry of Education, 2022[1]).

Likewise, Portugal has a National Strategy for the Inclusion of People with Disabilities (*Estratégia Nacional para a Inclusão das Pessoas com Deficiência*, ENIPD). A national consultation was recently conducted to design the 2021-2025 ENIPD. Like the previous strategies (the first one being in 2011-2013), the 2021-2025 ENIPD has "Education and Qualification" as one of its main strategic orientations. The "Promotion of an Inclusive Environment" is also one of its main strategic orientations.

Initial Teacher Education and Continuous Professional Learning

Initial Teacher Education (ITE)

In Portugal, teachers are required to have a Master's (MA) degree in Education and Teaching, which results in a teaching qualification to teach in public, private or cooperative education. This requirement applies to all teachers regardless of the school level they teach (pre-primary, basic and upper-secondary education). The teaching profession is regulated, and the qualifications required of teachers are defined in the legislation (Decree Law No. 79/2014). The legislation defines the curricula (main elements) and minimum study requirements for each of the main elements, including General educational sciences (GES, 5-15%[2]), Subject-specific didactics (SSD, 25%), Supervised teaching practice (STP, 35 - 40%) and Subject-matter knowledge (SMK, 15%) (Ministry of Education, 2022[1]).

Currently in Portugal, there are 150 ITE programmes offered by both public and private Higher Education Institutions (HEIs) aimed at preparing teachers to become fully capable of independently analysing and solving problems in education and teaching. Of this number, 80 programmes (53.4%) are offered by 32 training institutions whose focus is on preparing teachers for pre-primary education and the first and second cycles of basic education (Grades 1 through 6) (Ministry of Education, 2022[1]). Seventy programmes (46.6%) are offered by 12 training institutions that prepare teachers to teach in the third cycle of basic education and secondary education (Grades 7 through 12). A significant number of these 70 programmes that focus on preparing the third cycle and secondary education teachers are concentrated in the largest universities in Portugal (Ministry of Education, 2022[1]). In particular, 47 of the 70 programmes are offered by four public HEIs, namely the University of Lisbon, the New University of Lisbon, the University of Coimbra and the University of Porto.

Annex 3.A provides insight into initial teacher preparation and highlights areas of focus and the weight put on specific areas of the curriculum. Specifically, Annex Table 3.A.1. displays the training programmes offered by two of the main public universities in Portugal, the University of Coimbra and the University of Lisbon. The data display the training programme and main elements as well as the number and workload of courses included in the corresponding syllabus (Ministry of Education, 2022[1]).

Teaching practice is an essential component of initial teacher preparation in Portugal and attendance is mandatory. However, the European Credit Transfer and Accumulation System (ECTS) for Supervised Teaching Practice (STP) is small when compared to other curricula elements. In some of the high performing education systems like Finland, a master's degree that leads to teacher qualification includes 20 credits of practice time for both class teachers and subject teachers, carried out for between 5-6 weeks each year (see Box 3.2). Some programmes consider the STP as a single curricular unit, followed by a seminar delivered at the training institution. Other institutions tend to split the component into smaller ECTS units, which are then fused with courses on research methods in education. The STPs are completed in schools that have agreements with universities. A cooperating teacher from the school and a supervisor from a university guide the practice of the teacher in training. Trainees must develop a reflective portfolio and, in the end, prepare a traineeship report that is then defended in public examinations (paragraph (b) no.1 of article 20 of Decree Law No. 74/2006, amended by Decree Law No.115/2013 (Melo, 2015[7]; Vieira, 2013[8])). A close, strong and positive relationship between faculty (professors at universities) and schools is essential if the maximum benefit is to be gained from in-school practice.

Box 3.2. Practice in Finnish training schools

In initial teacher education (ITE) in Finland, theory and practice are closely intertwined. After certain theoretical studies, university students enrol in ITE practice in university-affiliated training schools. Training schools have the same curricular and teaching requirements as other municipal public schools, but their schedules are designed to accommodate the feedback and collaboration needs of student teachers and mentors without affecting the learning time of students.

The master's degree that leads to teacher qualification includes 20 credits of practice time for both class teachers and subject teachers, carried out for between 5-6 weeks each year. The guided teacher training periods offer each student the possibility to practice what they studied. Guidance and supervision during the practice are co-shared by teachers at the practice school and university lecturers.

The idea behind this approach is to model collaboration among teachers and give a wider point of view about teaching to student teachers. Often, student teachers are also placed with their peers to engage in first-hand experience of co-teaching. Teacher mentors who supervise practice teaching at teacher training schools support student teachers in their meaning-making process by facilitating goal-setting, self-observation, and the description and analysis of observations and experiences to improve their teaching practice.

During or after teaching practice there is usually a pedagogical or didactic seminar at the university, where students reflect on their teaching practice experiences and their visits to different schools. Reflection is seen as an important part of professional learning. Reflection allows students to recall, consider and evaluate their experiences to learn from practical experience. Through this process, students are supported to transform practitioner (practical) knowledge into professional knowledge through reflective activities and guided discussions in small groups.

Source: University of Helsinki Publication Portal (2019[9]), "Why is Finnish teacher education excellent? Teacher training schools provide an explanation", https://www.helsinki.fi/en/news/education/why-finnish-teacher-education-excellent-teacher-training-schools-provide-one-explanation (access on 24 November 2021); Finnish National Agency for Education (n.d.[10]), https://www.oph.fi/en (accessed on 24 November 2021).

Decree Law No. 240/2001 stipulates the competencies that teachers should acquire from initial preparation, including the following dimensions:

- *Professional, social and ethical dimensions*: teachers promote curricular learning, basing their professional practice on knowledge developed through the production and use of diverse integrated knowledge.
- *Development of education and learning*: teachers promote learning according to the curricular domain. Within the framework of a pedagogical relationship teachers promote quality by integrating scientific and methodological rigour along with knowledge of the areas that substantiate it.
- *School participation and relationship with the community*: teachers carry out their professional activity in an integrated way, combining different dimensions of the school work with societal services within the context of the community in which it operates.
- *Professional learning throughout life*: teachers are trained to be lifelong learners by continuously developing professional practice through reflection and the use of research performed in cooperation with other professionals.

Ordinance No. 212/2009, 23 February, establishes the competencies required to qualify as a special education teacher. In line with the ordinance, teachers recruited for special education (*Educação Especial*)

purposes must have a teaching qualification from any of the recruitment groups and specialised training in the area of special education as required by the relevant legal framework. Portugal has a system named "recruitment groups". The main function of the recruitment groups is to select and recruit teaching staff in pre-primary, basic and secondary education. There are currently 36 recruitment groups in Portugal distributed across the different levels of schooling and curriculum subjects.

The 2009 legislation underlines two ways to become a special education teacher: professional qualification and specialised training. Professional qualification implies at least five years of training in mainstream education. Decree Law No. 95/97, 23 April, established the basis for specialised training in special education, which typically consists of at least 250 hours distributed by general training in educational sciences (20%), specific training (at least 60%) and research training. The new Decree Law No. 54/2018 on Inclusive Education assigns a distinctive role for special education teachers in schools, including:

- Collaborating with the different stakeholders (classroom teachers, parents, school psychologists, etc.) in planning students' educational process.
- Providing direct support to students, which should complement the work developed in mainstream classrooms or other educational contexts.

In compliance with the EU requirements for accreditation of higher education programmes enshrined in Regulation No. 765/2008, Portugal has in place a rigorous accreditation policy for HEIs. The main body responsible for the accreditation of ITE programmes is the Agency for Assessment and Accreditation of Higher Education (*Agência de Avaliação e Acreditação do Ensino Superior,* A3ES). The agency's role goes beyond administrative matters by verifying whether new and existing training programmes meet legal requirements. It provides a uniformly rigorous approach to accreditation across ITE programmes, evaluating their adequacy to offer a professional teaching qualification. The agency also assesses the quality of human and material resources, training processes and outcomes achieved. A vital mission of the agency is to implement these accountability, monitoring and evaluation functions in a manner that does not take power away from higher education institutions to certify their graduates' teaching qualifications.

Continuous Professional Learning

In Portugal, teachers participate in a considerable amount of professional learning activities. Proof of participation in professional learning represents 20% of teachers' overall annual evaluation score (Liebowitz et al., 2018[11]). Opinions gathered during interviews with experts by the review team and official documents suggest that all career teachers with permanent tenure must participate in at least 50 hours of professional learning activities every four years. This means that a teacher has to participate in at least 12 hours of professional learning every year, which translates to one hour of professional learning per month. By international standards (European Commission/EACEA/Eurydice, 2021[12]), this is a significant amount of time and resources that can have both positive and negative implications. On the one hand, this means that there are opportunities to develop and improve teachers' work as professionals. On the other, it is not clear whether this is making a difference in respect to the thinking and practice of teachers and school leaders in the areas of diversity, equity and inclusion.

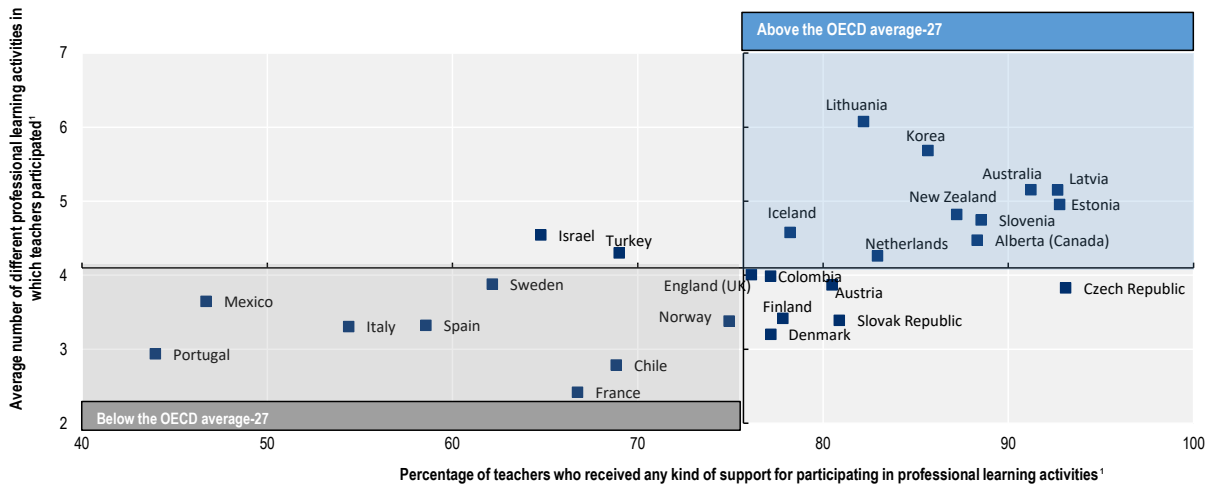
In Portugal, school clusters define priority areas and needs relevant to improve teachers' competencies and knowledge. These choices are often made in close cooperation with the Teachers' Training Centre associated with the school cluster (*Centros de Formação de Associações de Escolas*, CFAEs). In November 1992, the government enactment of the Decree Law No. 249/92 brought into force the CFAEs. This Decree Law stipulates that CFAEs should be localised within and affiliated to school clusters. The CFAEs define and design the training plan that is then provided by these centres. Teachers are free to attend professional learning offered by other training centres or training institutions such as HEIs.

There are several other avenues for continuous professional learning in Portugal. Professional learning courses can also be organised in collaboration with universities and other stakeholders, such as teacher

unions or national specialised associations (e.g. on special education needs or on gifted students)[3] to offer specific workshops, seminars and Massive Open Online Courses (MOOC). The Ministry of Education (MoE) can also design and require teachers to attend specific training activities, which was, for example, the case following the adoption of the new legal framework on inclusive education (Ministry of Education, 2022[1]).

However, as recently pointed out by the OECD (Liebowitz et al., 2018[11]; OECD, 2019[13]), teachers in Portugal are less likely than teachers from most other countries participating in the OECD Teaching and Learning International Survey (TALIS) to receive release time during regular working hours to participate in professional learning activities (see Figure 3.1) and among the most likely to pay for professional learning (OECD, 2019[13]). The latest report by the European Commission/EACEA/Eurydice on teacher careers, development and well-being in Europe shows that in Portugal, 77.2% of lower secondary teachers "agreed" or "strongly agreed" with the statement that professional learning conflicted with their work schedule, which is one of the highest in the EU and well above the EU average of 52.9% (European Commission/EACEA/Eurydice, 2021[12]). In TALIS 2018, barriers to participating in professional learning reported by Portuguese teachers include expense, lack of employer support, conflict with work schedule, no relevant offerings and lack of incentives for participation (OECD, 2019[13]). These indicators corroborate qualitative impressions gathered by the OECD review team during online interviews conducted with school staff (mainly teachers but also school psychologists, sign language experts and other support staff) who stated the challenge linked to attending professional learning sessions in the evening or weekends at their own expense, without additional compensation.

Figure 3.1. Participation in professional learning and level of support received (TALIS 2018)



Notes: 1. Refers to professional learning activities in which teachers participated in the 12 months prior to the survey.
Only countries and economies with available data for the average number of different professional learning activities in which teachers participated and for the percentage of teachers who received any kind of support for participating in professional learning activities are shown.
The OECD average – 27 - includes all TALIS 2018 OECD countries, with the exception of Belgium, Hungary, Japan and the United States.
Source: Adapted from OECD (2019[13]), *TALIS 2018 Results (Volume I): Teachers and School Leaders as Lifelong Learners*, Figure I.5.16., https://doi.org/10.1787/1d0bc92a-en.

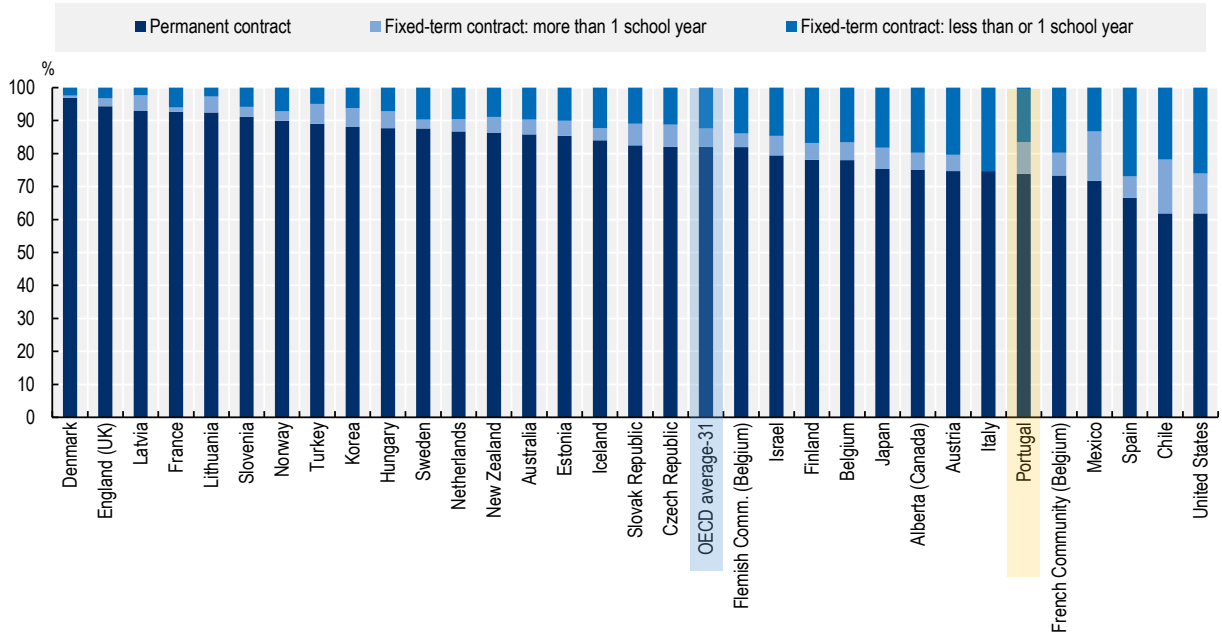
StatLink https://stat.link/2hryv4

Recruitment, retention and evaluation of teachers

Teachers in Portugal hold either permanent tenure positions or fixed-term contracts. Permanent tenure is a civil servant position, and employment conditions follow the general rules established for public sector employees, whereas fixed-term positions are temporary. Data from TALIS 2018 show that rates of permanent positions in Portugal are among the lowest in the EU only after Spain, Romania and the French Community of Belgium (OECD, 2020[14]). Portugal also has the highest proportion of teachers with fixed-term contracts for more than one school year in the EU (see Figure 3.2). Most novice teachers start with a fixed-term contract. Tenured teachers (civil servants) progress through ten steps (*escalões*) of the professional teaching career. To advance from one step to the next, teachers must teach for a minimum period of four years at their current level, complete 50 hours of professional learning and receive a rating of "at least good" in their latest evaluation.

Figure 3.2. Teachers' employment on fixed-term and permanent contracts

Percentage of lower secondary teachers reporting that they work on a fixed-term or a permanent contract



Notes: Permanent employment refers to an ongoing contract with no fixed end-point before the age of retirement.
Countries and economies are ranked in descending order of the percentage of lower secondary teachers who have a permanent employment.
Source: OECD (2020[14]), *TALIS 2018 Results (Volume II): Teachers and School Leaders as Valued Professionals*, Figure II.3.1., https://doi.org/10.1787/19cf08df-en.

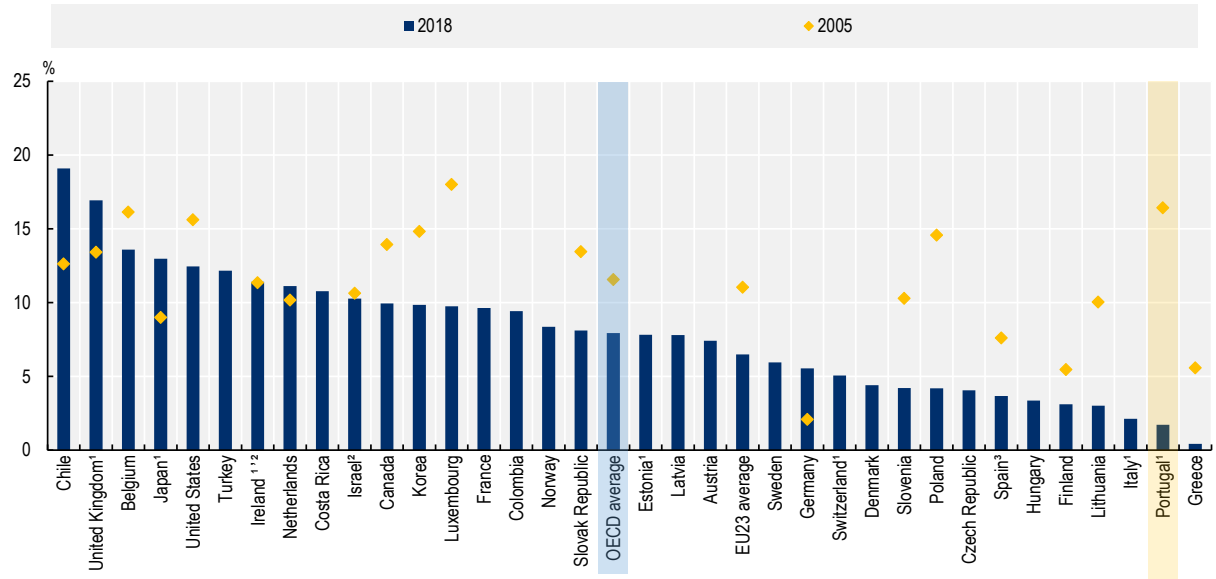
StatLink https://stat.link/epdiwt

Portugal has a highly centralised and controlled teacher recruitment system. All teachers are recruited through a national system. Municipal councils can recruit non-teaching staff but do not have the prerogative to recruit teachers. In rare cases, when the centralised teacher recruitment system cannot provide suitable candidates, schools can organise their own recruitment. Consequently, Portuguese teachers who wish to apply for permanent positions or placement have to apply through the centralised system, which has been recently digitalised.

As noted by Santiago et al. (2012[15]), the process of recruitment of teachers is done through public competition. Applications are ranked based on criteria, including a current position at school (permanent, fixed-term or no ties in the case of first placement), length of service, professional learning activities and average grade obtained in initial higher education studies. Candidates who are ranked high are appointed for the post or position. Santiago and colleagues (2012[15]) also explain that the current system of teacher recruitment in Portugal poses foreseeable challenges. The process accounts for the major differences between schools, with a concentration of some of the most skilful and experienced teachers in wealthier neighbourhoods and the most prestigious schools. Furthermore, the great majority of recently graduated teachers, as well as more experienced teachers who have not managed to obtain a permanent contract, have to apply every year to renew their temporary contract. Most of them also attempt each year to be placed closer to their place of residence. Impressions from meetings with stakeholders by the review team attest to this point. In some cases, teachers obtain a contract in a school cluster or individual school that is far away from their residence. For example, a newly trained teacher told their experience of having to commute over 300 kilometres daily to the school where they were placed (Liebowitz et al., 2018[11]).

With regards to teacher retention, Portugal has not faced shortages of teachers although nowadays there are some indications that this is changing. Teacher turnover seems quite stable in public and private schools; most teachers stay in their jobs until they retire and do not leave the profession for other jobs. Eurydice/Eurostat data provide evidence in support of this. Data show that the majority of teachers in Portugal are within the ages of 35-49 (49.9%) and over 50-years old (46.7%), with only 1% of primary teachers considered young teachers (aged under 30) (European Commission/EACEA/Eurydice, 2021[12]), which is lower than the OECD average of 12% (OECD, 2020[16]). Furthermore, OECD Education at a Glance (2020[16]) suggests that, between 2005 and 2018, the proportion of young teachers at the upper-secondary level in Portugal decreased by 15 percentage points, whereas it dropped by four percentage points on average across OECD countries during the same period (see Figure 3.3), thus indicating a rapidly ageing teacher population in Portugal. The increasingly ageing teacher population in Portugal remains a challenge.

Figure 3.3. Share of upper-secondary teachers below the age of 30 (2005/2018)



Notes: 1. Upper secondary includes programmes outside upper-secondary level.
2. Public institutions only.
3. Upper secondary includes lower secondary programmes.
Countries are ranked in descending order of the share of teachers below the age of 30 in 2018.
Source: Adapted from OECD (2018[17]), "Education at a Glance: Distribution of teachers by age and gender (Edition 2018)", *OECD Education Statistics* (database), https://doi.org/10.1787/27e7e886-en.

StatLink https://stat.link/qdhg34

Teacher performance evaluation is a central concern in the Portuguese school system. It is mandatory for all teachers in Portugal, regardless of the contractual relationship with a school (probation, fixed-term contracts or permanent contracts) and at all levels of education (pre-primary through secondary school). It is a mandatory process for career advancement and contract renewals (Liebowitz et al., 2018[11]; Santiago et al., 2012[15]).

Santiago et al. (2012[15]; 2009[18]) present a comprehensive account of the performance evaluation system including the chronology and rationale of teacher evaluation in Portugal. In brief, the Portuguese teacher evaluation model underwent numerous changes and amendments between the end of the 20th century and the 2010s. The current evaluation model was introduced in 2011 and, according to Santiago and colleagues (2012[15]), it maintains the original objectives and principles included in the 2007 model and evaluates teachers based on similar indicators and domains of performance. The current teacher evaluation model reflects the broader regulation on performance appraisal in the public sector in Portugal and stipulates that teacher appraisal shall cover the following three aspects of a teacher's work: "scientific-pedagogical; participation in school activities and links to the community; and professional development" (Santiago et al., 2012[15]). The model has the following reference points:

- Objectives and goals set by individual schools in their educational projects and plans (at the school level); and
- evaluation parameters established by each school's pedagogical council for each of the three dimensions covered by teacher appraisal (at the school level) (Santiago et al., 2012, p. 70[15]).

There is a collegiate body in schools that is charged with the responsibility for evaluating and making decisions about teacher performance. According to Santiago and colleagues (2012[15]), each school

establishes an evaluation committee called the Section for the Appraisal of Teacher Performance, which is part of the school pedagogical council. A positive element of the current evaluation model compared to the previous model is that it involves more teachers in the appraisal process. The evaluation team is comprised of the president of the pedagogical council (often the school director) and four teachers of the pedagogical council. As a rule, evaluators have to be from the same subject group as the teacher being appraised, hold a qualification or experience in evaluation or pedagogical supervision, and should have the same or a higher rank in the career ladder (Liebowitz et al., 2018[11]; Ministry of Education, 2018[19]). Importantly, while the process is decentralised to schools, a number of national agencies play a role in driving this process. For instance, the MoE provides national regulations, tools and guidelines to implement teacher appraisal and training for evaluators. The General Inspectorate of Education and Science (*Inspeção-Geral da Educação e Ciência*, IGEC) monitors schools' implementation of teacher appraisal and the Teacher Evaluation Support Office, which is part of the Directorate-General for School Administration (*Direção-Geral da Administração Escolar*, DGAE). Additionally, it provides technical support and advice regarding teacher appraisal to schools.

Performance evaluation results can be consequential for teachers as they have implications for teachers' career progression and monetary rewards (as in salary increment), as well as identifying individual professional learning needs. Among the wide spectrum of responses collected by the OECD review team during several interactions with teachers and school leaders, a key message that stood out was the widely perceived challenges posed by the teacher evaluation system and the accompanying stress. Recent data from Eurydice (2021[12]) show that teachers in Portugal reported the highest stress levels associated with appraisal as a requirement for career progression of all EU countries and this value was, from a statistical point of view, significantly different from the EU value.

In conclusion, the factors mentioned above, including recruitment procedures, non-permanent contracts and stringent evaluations, can serve to detract teachers from focusing on the salient issues of equity and inclusion in classrooms, which has direct implications for promoting equitable and inclusive learning opportunities for all students.

Strengths

Teachers in Portugal are highly qualified

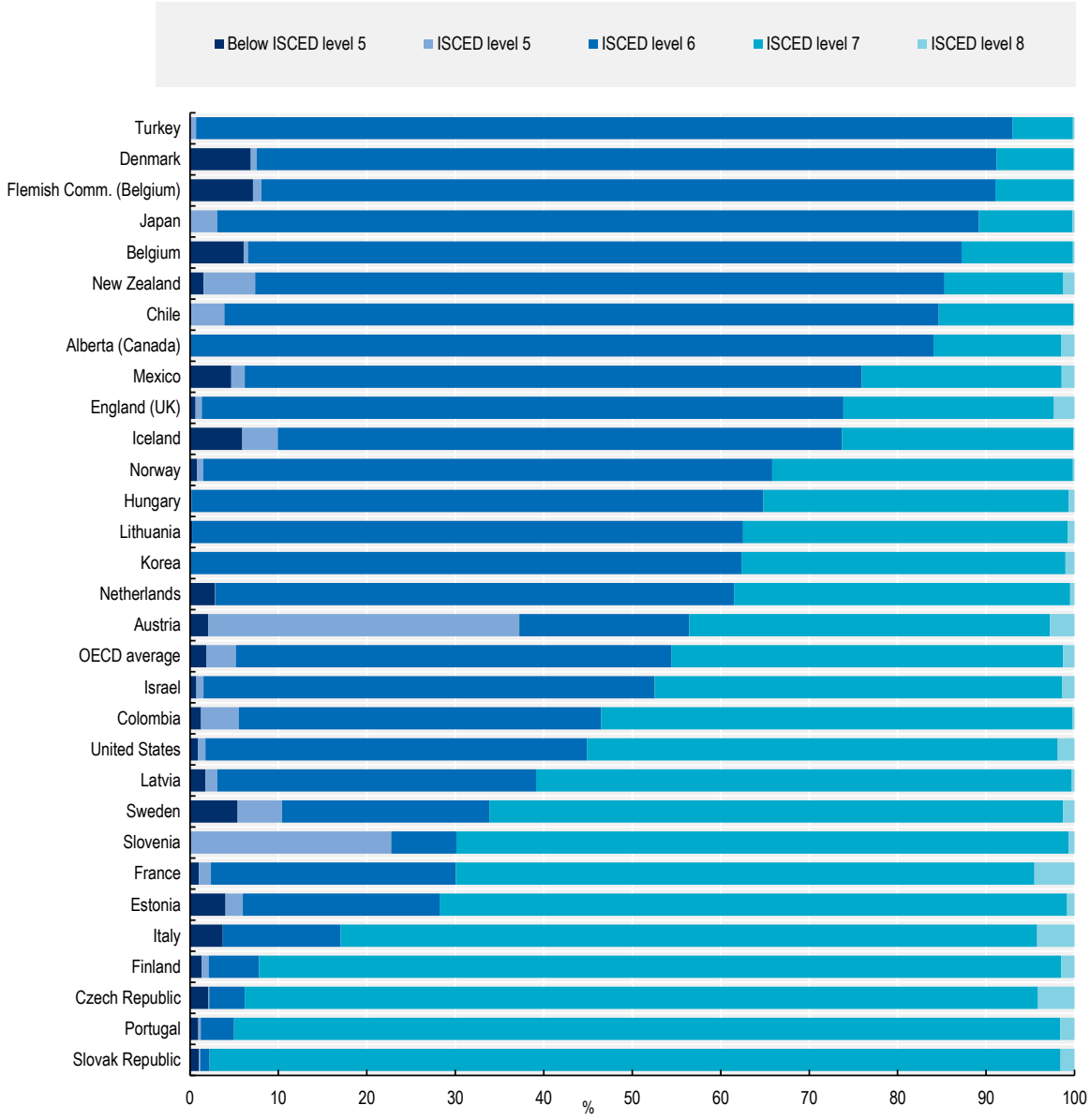
There is broad consensus that the single most important within-school variable influencing student achievement is teacher quality (Adnot et al., 2017[20]; European Commission/EACEA/Eurydice, 2021[12]; Jackson, 2012[21]). It is also well known that teachers in highly successful school systems are highly qualified, with a master's degree qualification in teaching. Since the enactment of the Decree Law No. 79/2014, all teachers including pre-primary, basic and upper-secondary education in Portugal must obtain a master's degree in teaching in order to teach. Data from TALIS 2018 show that Portuguese teachers and principals are among some of the most highly qualified within the OECD with 93.4% of teachers having acquired qualifications at ISCED level 7 (see Figure 3.4) and 94.2% of principals having acquired qualifications at ISCED level 7 (see Figure 3.5). Harnessing the benefits of its high-quality teaching force as evidenced in some European countries will be crucial in promoting inclusive education.

Portugal can capitalise on its highly qualified teaching force and recent curriculum adjustments within the new Decree Law No. 55/2018 that prioritises the implementation of an educational policy with a people-centred approach. This approach ensures equitable access to public education along with the introduction of Citizenship Education as a vehicle to drive the inclusive education agenda. This perspective aligns with previous OECD conclusions suggesting that readily measurable teacher characteristics such as teacher qualifications, teaching experience and indicators of academic ability or subject-matter knowledge tend to be positively associated with student performance, even if the correlation coefficients

tend not to be large (Adnot et al., 2017[20]; Chetty, Friedman and & Rockoff, 2014[22]; Jackson, 2012[21]; European Commission/EACEA/Eurydice, 2021[12]; OECD, 2019[13]). This, therefore, highlights the need for highly qualified and committed teachers who are prepared for their job.

Figure 3.4. Highest educational attainment of teachers (TALIS 2018)

Results based on responses of lower secondary teachers[1,2]



Notes: 1. Education categories are based on the International Standard Classification of Education (ISCED-2011). ISCED levels 6 and 7 programmes are generally longer and more theory-based, while ISCED level 5 programmes are typically shorter and more practical and skills-oriented.

2. ISCED level 5 includes bachelor's degrees in some countries.3. OECD average covers 31 countries for teachers and 30 countries for principals (see Annex B of OECD (2019[13]) for further information).

4. Countries and economies are ranked in descending order of the percentage of lower secondary teachers whose highest level of formal education is either ISCED level 7 or ISCED level 8.

Source: Adapted from OECD (2019[13]), *TALIS 2018 Results (Volume I): Teachers and School Leaders as Lifelong Learners*, Figure I.4.3, https://doi.org/10.1787/1d0bc92a-en.

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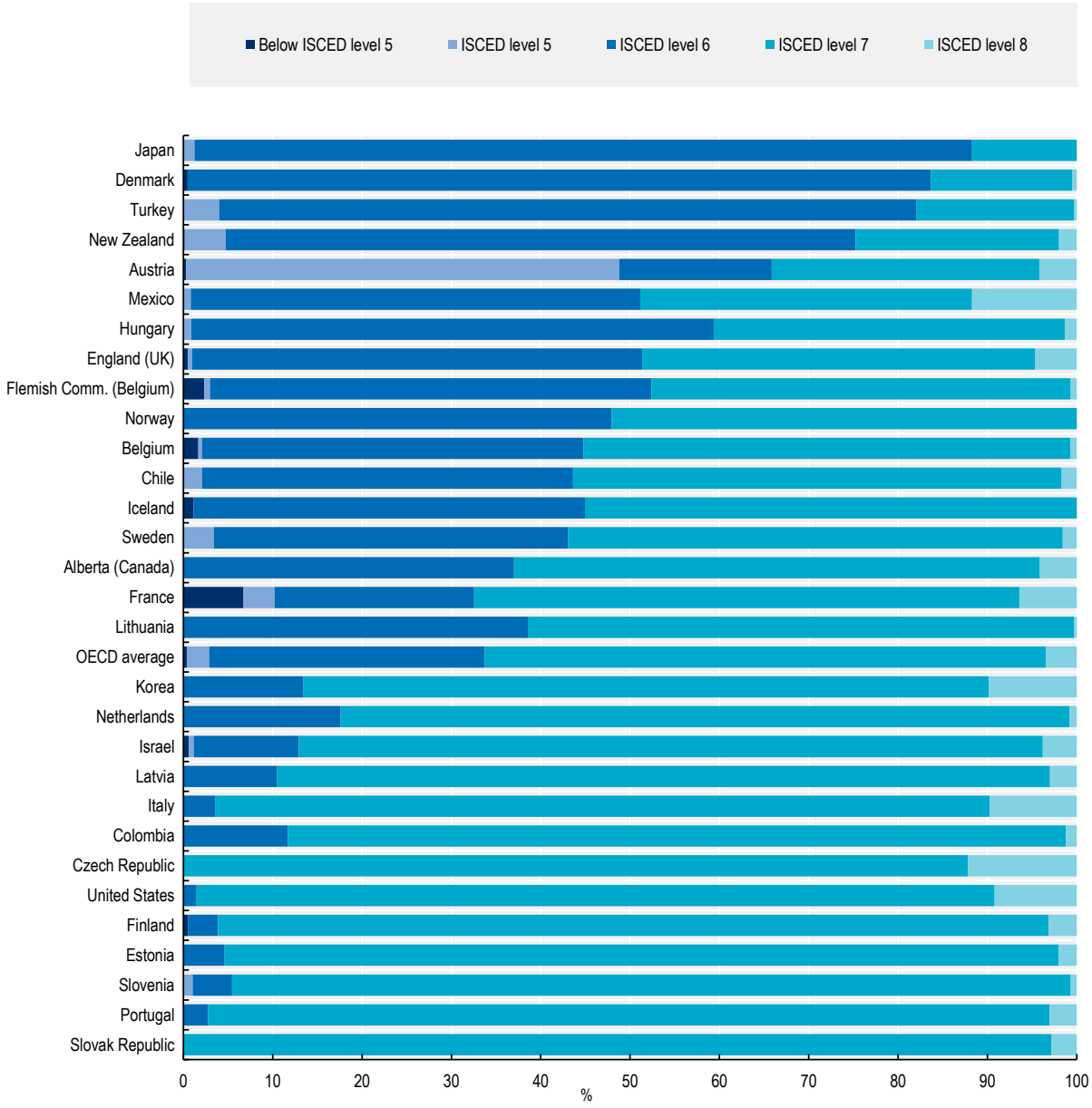
Figure 3.5. Highest educational attainment of principals (TALIS 2018)

Results based on responses of lower secondary principals[1,2]



Notes: 1. Education categories are based on the International Standard Classification of Education (ISCED-2011). ISCED levels 6 and 7 programmes are generally longer and more theory-based, while ISCED level 5 programmes are typically shorter and more practical and skills-oriented.

2. ISCED level 5 includes bachelor's degrees in some countries.3. OECD average covers 31 countries for teachers and 30 countries for principals (see Annex B of OECD (2019[13]) for further information).

4. Countries and economies are ranked in descending order of the percentage of lower secondary teachers whose highest level of formal education is either ISCED level 7 or ISCED level 8.

Source: Adapted from OECD (2019[13]), *TALIS 2018 Results (Volume I): Teachers and School Leaders as Lifelong Learners*, Figure I.4.3, https://doi.org/10.1787/1d0bc92a-en.

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Widespread awareness and acceptance of diversity, equity and inclusion permeates the Portuguese school system

Portuguese schools visited by the review team demonstrated a genuinely inclusive environment and profound awareness and acceptance of inclusive education and diversity (see Chapter 4 for a detailed discussion of this). The review team was struck by the extent to which children and young people are aware of this emphasis and the ways this is influencing their thinking about student differences. Many inspiring examples of students talking sensitively about differences among their classmates and positively about the benefits they bring to their lives was heard in schools with remarkably diverse populations in terms of, among others, cultures and religions, languages and abilities. This level of acceptance and openness in the school context is important in light of research showing that attitude can guide thoughts, behaviours and feelings (Petty, Wheeler and Tormala, 2003[23]). This is also important because attitudinal change requires a change or modification of attitude (Petty, Wheeler and Tormala, 2003[23]), which implies that change occurs when a person's attitude shifts from negative to positive or from having no attitude to having one. Due to the functional value of attitudes and the complex psychological and sociological processes involved in such a change, this accomplishment is remarkable and should be used as a lever for widespread change in Portuguese society.

A significant number of structures exist in the education system that can serve as avenues for capacity building

A review of official policy documents and legislation as well as impressions gathered from interactions with stakeholders by the OECD review team revealed several structures in place in the Portuguese school system that can be built upon to build capacity for diversity, equity and inclusion in education. These strengths include:

School clusters

Chapter 4 of this report provides an overview of the school cluster system in Portugal and how they can be vehicles for introducing new thinking and practices. There is considerable evidence from research to suggest that partnerships and networks of schools can be effective mechanisms for innovation (Bryk, Gomez and Grunow, 2011[24]; Ainscow, 2012[25]; Muijs et al., 2011[26]). Creating school clusters is one way of partnering or networking among schools. As defined by Bray (1987[27]), school clustering is the grouping of schools within the same geographical location for economic, pedagogic, administrative and political purposes (Bray, 1987, p. 7[27]). Bray (1987[27]) outlines a number of objectives for clustering schools, including help using scarce resources more efficiently, decentralising decision-making, helping disadvantaged communities, increasing participation in professional learning, supporting isolated teachers and improving social equity, all of which align with the principles of inclusion in education. In line with this thinking, the school cluster system in place in Portugal can be a very powerful instrument for capacity building for diversity, equity and inclusion.

Similar to many countries, Portugal shares new societal goals aiming at greater learning for all students. There is a growing demand for teachers and educational institutions to operate more efficiently and be culturally and linguistically responsive (Acquah and Szelei, 2020[28]; Acquah, Szelei and Katz, 2020[29]; Ladson-Billings, 2009[30]) but also responsive to the identities and personal characteristics of individual students. Responding to the needs of the student population requires a fundamental shift in attitudes, curriculum adaptation, cooperation among stakeholders and collaborative efforts between schools. While a shift in attitudes might be a long-term goal, the cluster system in place offers a platform for mobilising resources at the local level to support disadvantaged schools and improve social equity.

A foreseeable challenge to harnessing the benefits of the school cluster system is the centralised structures and partial autonomy granted schools in the Portuguese education system. As noted by Bray (1987[27]),

the cluster concept partly grew from developments in micro-planning. Micro-planning, commonly used in health care planning, postulates that it is impossible for a central agent, in this case, the MoE, to know the specific circumstances of every school and community. Thus, it is essential to decentralise decision-making power to local authorities and encourage local participation so that the full benefit of the school cluster can be realised. In moving forward with this thinking, branding and equipping school clusters as facilitators of inclusive education, the following definition proposed by UNESCO (2003[31]) is useful:

> *"In the broadest sense, micro-planning covers all planning activities at the sub-national level; that is, regional, local and institutional. Planning involves the future and has to do with the organisation and management of resources so as to enable the successful attainment of the set goals. Micro-planning is defined by its relationship with macro-planning. It is the expression of a desire to improve the operation of the education system by strengthening the planning work done at regional and local levels. It is a planning process that focuses on local characteristics and needs and builds local capacities. Micro-planning seeks to reach the objectives set at the national level by assuring greater equality in the distribution of educational services, a better fit between these services and the needs of local communities, and the more efficient use of available resources. Micro-planning requires the participation of local communities in the planning process and this involvement can be a key to the success of the planned reforms at the local level."*[4]

School Associations' Training Centres (CFAEs)

CFAEs are tasked with the design and implementation of training for school clusters in cooperation with schools. This is carried out by jointly drawing up an annual/multiannual training plan for a school cluster, based off of the priorities put forward by the associated schools. Each CFAE is affiliated to a school cluster and located in the same geographical area. This approach ensures that CFAEs tailor professional learning to meet the needs of the school clusters. By design and function, the training centres are in line with international thinking of local coordination. International perspectives emphasise local coordination as particularly crucial for efforts to promote equity and inclusion (UNESCO, 2017[32]). Proponents of micro-planning argue that local level planning and involvement can trigger feelings of ownership and participation (Bray, 1987[27]), which is critical in promoting inclusive education.

Efforts to improve educational quality around the globe have focused on improving teacher quality (ADEA, 2002[33]; ADEA, 2004[34]; Craig, Kraft and duPlessis, 1998[35]; European Commission/EACEA/Eurydice, 2021[12]; Prouty, 2000[36]). There is consensus among researchers and international organisations that good quality teaching and learning can be achieved when teachers engage in in-service professional training (OECD, 2019[13]; LeCzel, 2004[37]; Leu, 2004[38]; O'Grady, 2000[39]). This has put in-service teacher professional training into the limelight internationally. It also has raised questions on the most effective strategies to organise professional training activities. As governments around the world engage in efforts to promote teacher quality, many are turning to localised school and cluster-based in-service programmes as the primary means of professional support for teachers (LeCzel, 2004[37]; O'Grady, 2000[39]). According to Leu (2004[38]), the shift towards school-based and cluster-based in-service programmes is fundamentally rooted in modern conceptions of student learning and teacher training. Leu argues that current notions of teachers as empowered and reflective practitioners who can make informed professional choices and be responsive to student diversity requires a robust, active and participatory model of teacher learning (Leu, 2004[38]). While the school association training centres might have the potential to drive the equity and inclusion school agenda in Portugal, it is essential to integrate all plans into a national framework that ensures monitoring and evaluation as well as accountability. Also, it will be vital to liaise the work of school association training centres with ITE programmes in higher education institutions in Portugal. This coordination will enhance synergy and cohesion in subject matter and delivery of professional learning activities. It will also ensure that a broader viewpoint of diversity and inclusion will be adopted instead of the current perspective focused on students with SEN.

Resource Centres for Inclusion

Portugal's new legislation Decree Law No. 54/2018 stipulates that students who need additional support should be integrated in mainstream classrooms and learn with other students while being provided with support for specific curriculum adjustments to ensure full access to the curriculum. Specialised support is, to a large extent, to be provided by the Resource Centres for Inclusion (*Centros de Recursos para a Inclusão*, CRIs) whose personnel have the professional expertise of providing special services. During interviews with stakeholders, the review team gained the impression that CRIs could be additional hubs for promoting innovation in the system. Besides having a solid expertise on supporting students with SEN, most CRIs are well-established and connected to the community. Some of them seem to have broader expertise and be able to also provide support to other students in addition to those with SEN.

Multidisciplinary teams

During interviews with stakeholders carried out by the review team, the Multidisciplinary Team (*Equipa Multidisciplinar de Apoio à Educação Inclusiva*, EMAEI) was highlighted as a key cornerstone in school-level implementation of policies and practices for diversity, equity and inclusion. Required since the adoption of Decree Law No. 54/2018, the EMAEI brings together professionals from within and beyond the school, including teachers, psychologists, social workers and health professionals who work collaboratively in identifying and meeting the needs of students with physical impairments or other health-related issues. Scholars from the United States (Chalfant and Pysh, 1989[40]; Harris, 1995[41]) and the United Kingdom (Norwich and Daniels, 1997[42]) show that multidisciplinary teams can be effective. As Daniels, Creese and Norwich (2000[43]) note, multidisciplinary teams provide an opportunity to support students and teachers. As a form of group problem-solving, they have the potential of extending staff involvement in the development of policy and practice related to students with SEN and broader diversity, equity and inclusion in education. They can be indispensable in addressing students' individual needs and bringing about change in school systems.

Existing legislation allows curricular adaptations in Citizenship Education for students

The student population in Portugal is highly diverse. As mentioned in Chapter 1, according to data from PISA 2018, 7% of students in Portugal schools had an immigrant background in 2018 (OECD, 2019[44]). When examining the percentage of students with an immigrant background in Portugal, it is important to take into account that Portugal has one of the most flexible naturalisation laws in the EU. The Portuguese Nationality Law (No. 37/81, of 3 October), which was amended in 2018 to broaden access to Portuguese citizenship, allows children with foreign-born parents who have been legally living in Portugal for two years preceding the birth to obtain Portuguese citizenship. This means that, by the time children start school, many would not be identified as immigrants. Taking this into consideration, diversity in Portuguese schools might be higher than what the figure points to. In response to the diversity in its classrooms, Portugal has introduced Citizenship Education (See Context and main features section) as a way to develop student capacity to analyse and understand intercultural issues and global connectedness, social and emotional skills, and sustainable development goals. Citizenship Education can also develop values such as respect, self-confidence and a sense of belonging within students, all of which are important to create an equitable society for all and advance shared respect for human dignity. As learned by the review team during the school visits in Portugal, tremendous progress has been done on this front. Citizenship Education is no longer an isolated curriculum area but permeates the activities of all subjects in schools.

Schools play a crucial role in helping young people to develop intercultural competencies. Recognising this and introducing courses at all levels of schooling is a major progress. Both the OECD and international researchers have emphasised the role of schools in promoting this (OECD, 2021[45]; Sinicrope, Norris and Watanabe, 2007[46]). Schools can provide opportunities for children and young people to critically examine their own worldviews and global developments that are significant to the world and their own lives. They

can equip students with tools to use digital media and social network platforms effectively and responsibly. Schools can also encourage intercultural sensitivity and respect by engaging students in experiences and activities that foster an appreciation for diverse cultures and languages. Additionally, they can teach young people the importance of challenging cultural biases, stereotypes and racism (OECD, 2021[45]; Sinicrope, Norris and Watanabe, 2007[46]). Many OECD countries frame this discourse around competencies from a globalised perspective, which is often envisioned within the area of global Citizenship Education. The impact of Citizenship Education has yet to be known as there are no available data on its impact in Portuguese schools.

Challenges

Professional learning activities and support structures for inclusion and diversity tend to centre heavily on students with SEN

Evidence gathered by the review team during the visits suggests that professional learning activities on inclusive education practices in Portugal still centre around students with SEN. Even though the principle of inclusion is widely understood in schools and is influencing actions on the ground, schools and resources are still mainly oriented towards the support of students with SEN. International research highlights that in many education systems, training on diversity, equity and inclusion tends to be infused into training to address students with SEN (European Agency for Special Needs and Inclusive Education, 2011[47]; OECD, 2021[45]).

Impressions gathered through consultations with stakeholders suggest that the composition and training of EMAEI staff tend to focus on students with SEN. Furthermore, the recent creation of EMAEI teams tend not to be well trained and often lack time to deliver their work. Therefore, the challenge is for Portugal to readjust the training and focus of the EMAEI teams to drive inclusive education and innovation in schools. Strategically, these teams can be equipped to offer a range of services to support young people at risk of educational underperformance and dropout. This includes, for example, focus on language development, mental health support, emotional support, bullying prevention and outreach to marginalised families.

Moreover, the review team repeatedly heard during interviews that available time for these teams to meet constituted a considerable barrier, where the teachers' working week includes non-teaching time in school. Data from TALIS 2018 show that Portuguese teachers spend on average 39.9 hours per week carrying out school duties (OECD, 2020[14]), while TALIS 2013 shows that teachers devote an additional 10 hours of work per week outside of their mandated hours at school in grading assignments, contacting families and planning lessons (OECD, 2014[48]). Portuguese teachers report higher levels of stress in relation to certain aspects of their job (European Commission/EACEA/Eurydice, 2021[12]; OECD, 2020[14]). Specifically, they report well above OECD averages of stress in relation to the following: addressing parents or guardian concerns (Portugal, 62.8%; OECD average, 33.4%); modifying lessons for students with SEN (Portugal, 66.7%; OECD average, 31.2%); having too much administrative work to do (Portugal, 76.7%; OECD average, 49.4%); and having too much lesson preparation (Portugal, 70.9%; OECD average, 33.4%).

Furthermore, although the review team gathered limited information on the focus and training that the staff at CRIs receive, impressions gathered suggest that the training and expertise within this body of experts tend to centre heavily on students with SEN and little on other dimensions of diversity. There was also a sense that training of CRI staff has not evolved much over the years and the practice still encourages forms of individualised support that are likely to reinforce segregated provision within mainstream schools, rather than efforts to make general practices more responsive to diversity.

This evidence is corroborated by data from TALIS 2018 showing that among professional learning activities attended by Portuguese teachers related to diversity and inclusion, teaching students with SEN was the

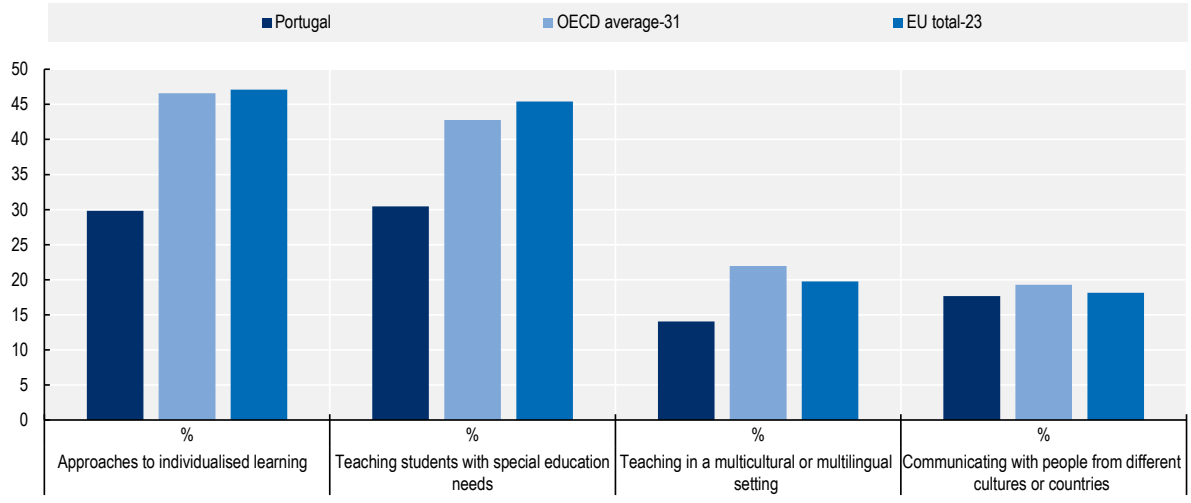
most highly attended (see Figure 3.6). Portuguese teachers have also expressed the highest levels of interest in receiving more professional learning in areas such as teaching students with SEN (27%), teaching in a multicultural or multilingual setting (21.6%), and student behaviour and classroom management (17.8%) (OECD, 2019[49]).

The reality on the ground is that Portuguese teachers do not only confront the challenge of teaching students with SEN. They are also, on a daily basis, dealing with culturally and linguistically diverse students, among others. As teachers work closely with students and have a direct impact on their learning, they need experience related to knowledge and methods of teaching to respond to diversity and complexity, providing a strong link between practical classroom experience and theoretical frameworks. This is particularly important given that knowledge of diversity and how to teach diverse students requires preparation and self-inquiry (Brussino, 2021[50]). Teachers need to be equipped with the knowledge and tools in order to feel prepared to provide language support and meet the different learning needs of their students. The change in needs for professional learning on teaching in multicultural or multilingual settings reported by teachers in Portugal is significant. It increased from 16.8% in 2013 to 21.6% in 2018, indicating a growing need for support in this area of competence (OECD, 2019[49]).

There is research to suggest that professional learning activities can have a positive impact on the work of teachers. A recent review found that professional learning activities that are carefully embedded within the organisation and the wider context of the teacher are more likely to be effective and increase teachers' intercultural competences (Romijn, Slot and Leseman, 2021[51]). This suggests that the limited professional learning activities around the issues of diversity, equity and inclusion may have implications for their ability to work with diverse students.

Figure 3.6. Percentage of teachers for whom the following topics related to diversity, equity and inclusion were included in their professional learning activities (TALIS 2018)

Results based on responses of lower secondary teachers



Source: OECD (2019[13]), *TALIS 2018 Results (Volume I): Teachers and School Leaders as Lifelong Learners*, Table I.5.18, https://doi.org/10.1787/1d0bc92a-en.

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Current design of continuous professional learning might be a considerable burden for teachers and not equip them in improving actual classroom practices

In Portugal, teachers are required to participate in a considerable amount of professional training activities that have direct implications for salary increment and career progression (See section on Continuous Professional Learning). There can be several reasons for this and some practical advantages associated with such a system. For instance, it might be the "soft power" that ensures that teachers participate in professional training. Professional learning represents an enormous investment in the development of human capital, directed at ensuring that the teaching and learning in schools are up to date and effective. From this standpoint, providing incentives for teachers to participate in it can be advantageous. Further, from a developmental point of view, career advancement should correspond to growth in expertise, i.e. learning that helps teachers develop in ways that will serve all of their students, even as expectations of students and schools are constantly changing.

However, given that the goal of professional learning for teachers is to strengthen student outcomes (Koonce et al., 2019[52]; Reeves, 2010[53]), it is important to reflect on why professional training is tied to promotion and salary increment and the unintended consequences this might have for teaching and learning in schools. This opens up several questions on the motivation behind engaging in professional learning and whether professional learning activities bring about changes in teachers' practices. This is important in light of research showing that training does not always transfer into practice. Therefore, thinking of how professional learning translates into practice is critical (Brion, 2020[54]) as well as of the reasons why there is no consensus among researchers on teachers' motivation with respect to professional learning. Work by the Oregon School Board in the United States (2009[55]) provides some explanations of teacher motivation: the importance of reward (expectancy theory), compensation for effort (equity theory) and the importance of varied and challenging work (job enrichment theory). This behavioural-oriented approach gives priority to incentives such as payments, career ladders and differentiated teaching roles. Others have presented an alternative intrinsic motivational approach to explain teacher motivation including the desire to help students learn and improved work context (e.g., class size, discipline, resources) and valued content (e.g., the opportunity for professional learning, challenging work and collegiality) (Frase and Sorenson, 1992[56]).

It is important to improve the methods for assessing the impact of professional learning on individuals and society and to use evidence on what works for diverse students in different contexts. The result of this process should be a much sharper focus on student outcomes. Teachers are the ones who work directly with students, translate curricular goals into classroom practices and shape the environment for learning. Teachers' knowledge, skills, attitudes and dispositions have direct and serious implications for the success of the students they teach. It is therefore important to think of professional learning more broadly as a stimulus for innovation rather than a "box-ticking" exercise.

Following the introduction of the Decree Law No. 54/2018, the National Government intensified actions to support teachers in the implementation of these new inclusive policy and curriculum differentiation. The CFAEs were tasked to provide localised training to school clusters. However, an analysis of documents and impressions matured after consultations suggest that, although the MoE has made considerable efforts to provide professional learning on areas related to diversity, equity and inclusion, these training opportunities are mainly theoretical and do not always provide teachers with concrete tools to deal with dimensions of student diversity other than students with SEN.

Another challenge in Portugal is funding and incentives provided for participation in professional learning. As reported by Liebowitz et al (2018[11]), there is a statutory requirement for Portuguese teachers to participate in in-service professional training courses, as proof of participation accounts for 20% of the overall score in their annual evaluation (see Continuous Professional Learning). Having this requirement in place will require providing the necessary support for participating. However, in Portugal, incentives are limited. As mentioned earlier, Portuguese teachers have increasingly had to pay for professional learning

(OECD, 2019[13]) and are least likely to receive release time during work hours to participate in professional learning among the countries included in the analysis.

ITE does not prepare teachers to deal with diversity, equity and inclusion

Commitment to inclusion is a continuous and lifelong learning process. Teachers are the drivers of change in schools. Therefore, to ensure the sustainability of inclusive education and wider impact, it is important that ITE reflects the new legal framework on inclusive education (Decree Laws No. 54/2018 and 55/2018). Although over 83% of Portuguese teachers included in TALIS 2018 reported feeling well prepared for teaching across multiple domains including subject content matter, pedagogy and practice (OECD, 2019[13]), consultation with stakeholders in the Portuguese higher education system suggests that ITE does not systematically cover diversity, inclusion or multicultural education, which are not officially required. The OECD review team gained the impression that:

- There are no compulsory requirements for initial teacher preparation to train prospective teachers for diversity, equity and inclusion.
- Inclusive education is a separate course of study, rather than a theme that permeates the whole ITE programme.
- Multicultural teacher education is not mainstreamed in the teacher education curriculum.
- As a result, teachers often feel unprepared and unable to respond to diversity in the classroom.

The lack of requirements for ITE curricula to include areas related to diversity, multiculturalism and inclusion came up frequently in the consultations carried out with stakeholders. The coverage of these areas is at the discretion of faculties. While there seem to be pockets of optional courses on diversity at various university departments, the majority of these courses tend to focus heavily on conceptualisations of diversity and do not provide any in-depth analysis of how culture, language and identity affect learning. These courses also tend to adopt what Nieto and Bode (2011[57]) would call a “conservative” approach to multicultural education and culturally responsive teaching where faculties do not dig deeper into issues such as homophobia, xenophobia and racism. As reported by Liebowitz et al. (2018[11]), the only recently introduced and required course for all prospective teachers in pre-service training on aspects of inclusion is a course on pedagogies to support the learning needs of students with SEN. The European Agency for Special Needs and Inclusive Education defines this as a Europe-wide problem (European Agency for Special Needs and Inclusive Education, 2011[47]). As Brussino (2020[58]) points out, the concept of inclusive education has traditionally been applied to promote the mainstreaming of students with SEN. However, today, conceptions of inclusive education have expanded to address other student groups, such as students with an immigrant background or belonging to ethnic groups, national minorities and Indigenous communities. This has meant that, in the past, issues around diversity and inclusion were infused into special education courses in higher education training. Reasons for not including diversity and inclusion-related ITE courses include lack of sufficient time to cover all content considered necessary for initial teacher education, which made it challenging to introduce any additional content to address diversity and inclusion. In general, across European countries, ITE courses on areas related to diversity and inclusion are mainly electives despite some countries making diversity and inclusion-related courses mandatory (European Commission, 2017[59]).

Evidence from TALIS 2018 shows that after subject content, pedagogy and classroom practice, aspects that are included in OECD countries teachers’ ITE and professional learning are student behaviour and classroom management (with 72% of all teachers included in TALIS 2018 stating this); monitoring student development and learning (69%); teaching cross-curricular skills (65%); teaching in a mixed-ability setting (62%); and the use of ICT for teaching (56%) (OECD, 2019[49]). Teaching in a multicultural or multilingual setting is rarely included as an element of teachers’ formal education, reflecting the realities in the field. Issues of diversity, equity and inclusion recently gained more space on the educational agendas and discourse of many countries and are gradually being infused into teacher training. Data from TALIS 2018

further show that Europe has the lowest share of teachers trained in multicultural/multilingual teaching. Portugal has one of the lowest shares (21%), only after Hungary (19%), the Czech Republic (16%), France (12%) and Slovenia (12%). Of these countries, Portugal and France have high rates of students with an immigrant background. In comparison, countries and systems with English as a first language as well as those with several official languages and/or a tradition of multiculturalism, including Alberta (Canada), Australia, England (United Kingdom), New Zealand and the United States, had the highest training in teaching in a multicultural or multilingual setting for teachers (60-80%) (OECD, 2019[13]).

Teachers interviewed by the review team noted that they did not feel fully prepared to handle diversity, equity and inclusion in schools in general. In particular, they did not feel supported and well trained to implement the Decree Law No. 54/2018 (see section on Building awareness of equity, inclusion and diversity in education) although most valued the law as highly important and needed. Similar stands were echoed by teacher educators.

The system of recruitment and evaluation of teachers might generate instability and inequity in the teaching workforce, which impacts negatively inclusion measures in schools

Recruitment of teachers

Concerning the appointment of teachers, Portugal has a centralised system of recruitment and placement. Newly graduated teachers and those in the field have to apply for permanent positions (civil servants) or fixed–terms (see Section on Recruitment, retention and evaluation of teachers). For newly graduated students who most often only secure fixed-term one-year contracts, this means having to apply for vacant positions every year. This can be very disincentivising when coupled with pressures from workload (both teaching and non-teaching) and demands for professional learning. Furthermore, this centralised decision-making process regarding the appointment of teachers to schools leaves no room for schools, educational institutions or school leaders to consciously shape the profile of their teams to support the local context and needs. School leaders are those who know the expertise that might be lacking in the teaching staff in their school. At the moment, school leaders are only consulted by the MoE to estimate the number of hours each school cluster and individual school needs. Therefore, further involving school leaders in this process could be more effective.

During the interviews conducted by the review team, various stakeholders raised a number of concerns about the current system, in particular, the fixed-term contracts. They mentioned that it affects the stability of the teaching staff of schools and the expertise of the teaching and non-teaching staff, especially those of the multidisciplinary teams, who are core school actors in the promotion of inclusion and success of all students. More broadly, this instability might impact the overall cohesion of schools. This ultimately has implications for school clusters' expertise and ability to tackle the challenges posed by the diversity of students. More specifically, this lack of stability and cohesion might lead to considerable obstacles in the identification and follow up of measures for students in need of support measures, mainly selective and additional ones (more details on these measures in Chapter 2).

Teacher evaluation

During the visit, the OECD review team gained the impression that teachers seem to spend time preparing for teacher evaluation rather than using it to build a stronger professional approach to teaching that reflects the need for students and schools to become innovative and inclusive learning centres.

In Portugal, teachers are evaluated based on a five-level rating scale as follows: insufficient, regular, good, very good or excellent. Upon evaluation, teachers are required to receive between good to excellent ratings at the end of each step of the teaching schedule, which is four years, to move on to the next professional

stage. However, the teaching schedule for the fifth step is two years. In addition to this, teachers are observed at least twice by an external evaluator at the end of second, fourth and fifth stages of the teaching schedule. When a teacher wishes to obtain the highest mark (excellent), the evaluation also includes class observation by a teacher from another school who is specifically qualified in supervision or teacher evaluation. While similar evaluation arrangements are implemented elsewhere, the weight and intensity of these appraisals can take a toll on teachers (Conley and Glasman, 2008[60]).

During the visit, the review team gained the impression that the evaluation process was not fully transparent. It seemed that there were no objective criteria for how the scoring (based on the insufficient, regular, good, very good or excellent ratings) is done. In some cases, scoring might be arbitrary as teachers are not given reasons for why one gets an excellent rating and another a good rating. This might create unhealthy competition and conflict between schools, as gaining a high grade of excellence has bearings on the image of individual teachers and the school as a whole, thus raising questions of equity and fairness.

Stakeholders described the process as bureaucratic and not linked to teacher accountability, personal growth needs or well-being. The current model in Portugal does not include reference standards to evaluate teachers on a diversity and inclusion dimension. Therefore, the process is limited in informing subsequent improvement of practice as there is limited or no feedback on how teachers could address diversity and inclusion in education. These challenges seem to have a considerable impact on the ability of teachers to respond to diversity within the classroom. Some examples noted of the impact of evaluation on teachers' work with diversity and inclusion to encourage inclusion include:

- The lack of boundedness in teachers' work. The review team gained the impression that teachers believed that there was always more they could be doing to support their students, especially those with an immigrant or Roma background. However, this desire was overshadowed by the fear of and preparation for evaluation (Conley and Glasman, 2008[60]; Hargreaves, 1994[61]).
- Relationships with, support and involvement of parents from different cultural and linguistic backgrounds such as immigrants and the Roma community (Carnegie Foundation for the Advancement of Teaching, 1988[62]).
- Anxiety posed by teacher evaluation threatens teachers' control of what and how they teach and the performance feedback they receive. This stands in direct conflict with teachers' professional accountability and ability to pursue professional tasks to the utmost (Conley and Glasman, 2008[60]; Glasman and Glasman, 2006[63]).
- Feelings of dissatisfaction or even apathy can reduce opportunities for constructive conversations about student achievement, including pedagogy, assessment and expectations.

For teachers, fear (ambiguity, uneasiness and discouragement) about the future stemming from evaluation and accountability measures leads to responses that Conley and Glasman (2008[60]) termed as "*politics of maintenance"* aimed toward protection against anticipated job losses (Conley and Glasman, 2008, p. 65[60]). In the context of building inclusive schools, such situations can pose serious challenges.

Lack of attractiveness of the profession

Among the various stakeholders interviewed by the OECD review team, there were concerns expressed about the ageing teaching force in Portugal. This situation is exacerbated by the fact that there are not many young people entering the teaching profession. According to data from TALIS 2018, Portugal is among the EU countries with the largest share of lower secondary teachers aged between 35 and 49 (52.4%) and over 50 years (46.9%) (OECD, 2019[13]). This presents a specific challenge to Portugal as these cohorts of teachers will retire in the next 15 or 20 years and would need to be replaced. Meeting the labour demand for such a large number of teachers requires concrete actions if Portugal is to avoid looming teacher shortages. While being extremely valuable assets due to the experience accumulated by these teachers, older teachers might also present challenges and the greatest resistance for effective

implementation of change (Snyder, 2017[64]). In light of the remarkable changes happening in Portuguese schools (both in terms of policy, practice and innovation), the paradox of innovation without change can present a challenge for the education system.

Portugal is also facing a shortage of students entering ITE programmes. Over the past years, the country has recorded low rates of students enrolling in ITE (Liebowitz et al., 2018[11]). Teacher educators and policymakers interviewed by the OECD review team repeatedly indicated their worries about the apparent disinterest in the profession among young people. Reasons include the low societal image of the teaching profession. This is a particular challenge for Portugal, which requires long-term planning to change this perception of the profession. In some of the highest performing education systems, the teaching profession is highly regarded and valued in society.

Against a backdrop of increasing demands, responsibilities and expectations of teachers, lack of job security (many teachers especially those aged below 35 remain on a fixed-term contract for several years) can generate stress and low motivation and efficacy. The persistent fixed-term contract does not guarantee job security, as expressed by teachers interviewed by the review team. Evidence from TALIS 2018 shows that, in Portugal, around 17% of teachers included in the study were on a fixed-term contract (OECD, 2020[14]). The OECD (2020[14]) highlights that, despite the fact that fixed-term contracts allow some flexibility in teacher supply, teachers on less than year-long temporary contracts tend to report lower levels of self-efficacy. The perception of lower self-efficacy may be related to the young age of the teachers who hold fixed-term contracts and have less working experience (OECD, 2020[14]).

Furthermore, according to data from TALIS 2018, only 9.4% of teachers in Portugal consider their salary to be satisfactory or very satisfactory (compared to an EU average of 37.8%) (OECD, 2020[14]). This means that fewer than one out of ten teachers show satisfaction with their salary in Portugal. Research on applied financial economics shows that there is a relationship between employees' salary satisfaction and psychological contract and job enthusiasm (Indrasari et al., 2018[65]; Hung-Wen and Mei-Chun, 2014[66]). According to Hung-Wen and Mei-Chun, employees care about reasonable salary mechanisms, motivating human resource strategy, appropriate reward system and available communication channels (Indrasari et al., 2018[65]; Hung-Wen and Mei-Chun, 2014[66]). Furthermore, research suggests that when employees sense their salary to be lower than the market average, they will harbour unsatisfactory feelings, put less effort into their work and even leave the job. This means that working conditions are essential to improve the attractiveness and status of any profession. Among working conditions, salary is the single most important factor that makes any profession appealing (Indrasari et al., 2018[65]).

Data from the Directorate-General for Education and Science Statistics (*Direção-Geral de Estatísticas da Educação e Ciência*, DGEEC) (DGEEC, 2021[67]) show that the Portuguese teaching force has a very small number of teachers with foreign backgrounds (see Table 3.2). In a multicultural country such as Portugal, this might create challenges. Evidence suggests that there are important benefits that teachers with diverse backgrounds provide to all students, especially students with diverse backgrounds (Carver-Thomas, 2018[68]; Carver-Thomas and Darling-Hammond, 2017[69]; Gershenson et al., 2017[70]).

Table 3.2. Distribution of teachers, by nationality, nature of the educational establishment, type of education and gender (2019/2020)

Nature, Type of Education and Gender		Nationality	
	Total	Portuguese	Foreign
Men and women	35 549	34 247	1 302
Public	28 095	27 089	1 006
University student	17 170	16 335	835
Polytechnic	10 925	10 754	171
Private	7 454	7 158	296
University student	4 642	4 411	231
Polytechnic	2 812	2 747	65
Women	16 283	15 752	531
Public	12 808	12 412	396
University student	7 579	7 256	323
Polytechnic	5 229	5 156	73
Private	3 475	3 340	135
University student	2 038	1 932	106
Polytechnic	1 437	1 408	29

Source: DGEEC (2021[67]), *Perfil do Docente 2019/2020 [Teacher Profile 2019/2020]*, https://www.dgeec.mec.pt/np4/%7B$clientServletPath%7D/?newsId=1279&fileName=DGEEC_DSEE_2021_PerfilDocente201920.pdf (accessed on 24 November 2021).

All of this has significant implications for the ability of teachers to respond to diversity within the classroom. Additionally, it affects the sustainability of inclusive education in Portugal.

Policy recommendations

From an international perspective, Portugal's actions towards inclusive society and schools are progressive, ambitious and responsive to the challenges posed by globalisation today. Having enacted a law on inclusive education (Decree Law No. 54/2018) and another on curriculum autonomy and flexibility (Decree Law No. 55/2018), Portugal set a solid foundation to advance the agenda for diversity, equity and inclusion in schools and wider society. Both laws have the potential to direct thinking and practices toward inclusion. However, laws by themselves do not produce change or results. People and structures do. It is in light of this that the following recommendations are provided as pointers to areas that need to be strengthened in order to facilitate a shift towards this new thinking and concrete change. Systemic reform is needed to tackle diversity issues more broadly and ensure the development of inclusive schools.

In order to translate the law into a change in school practices and the lives of students, the education system should improve the areas detailed below. The recommendations are divided into short-term and long-term to distinguish areas in which Portugal can take immediate steps to drive change and those that require longer-term planning.

Short-term policy recommendations

Identify and build on good practices to promote collaboration and capacity building to address all dimensions of diversity

Create an inclusive school environment for all students

An examination of the current implementation of inclusive education in Portuguese schools shows that the main focus until now has been on bringing all students together in mainstream classrooms for the majority of the day. While inclusive education might have been about mainstreaming of students with SEN (Alves, Campos and Janela, 2020[71]), inclusive practices will be successful for all students, regardless of their ethnicity, language, gender, socio-economic status or other personal characteristics. Portugal should consider expanding the scope of inclusive practices to reflect broader student diversity. Current thinking suggests that Portugal would benefit from thinking about ways in which existing successful inclusive education practices can be identified and scaled up. For instance, Portugal would benefit from identifying outstanding schools in terms of inclusive practices such as those implemented in some school clusters visited by the review team that were particularly striking in relation to their inclusive cultures (see Box 3.3). Besides dedicating resources to and projects for the inclusion of students with SEN, some clusters established multiple projects dedicated to the inclusion of students with an immigrant background and from Roma communities. For example, one of the clusters visited organised various events to highlight the value, practices and cuisine of communities from diverse cultural backgrounds.

Box 3.3. Creating an inclusive school climate

School climate

School climate is a broad and multidimensional concept, which can relate to all aspects of the school experience. In a positive school climate, students feel physically and emotionally safe; teachers are supportive, enthusiastic and responsive; parents participate in school activities voluntarily; the school community is built around healthy, respectful and cooperative relationships; and everyone looks after the school premises and works together to develop a constructive school spirit.

Researchers have not reached a consensus on the indicators that make up for school climate. Nonetheless, based on existing research, the OECD identified four main areas, some of which are covered by PISA 2018 (OECD, 2019[72]): (1) safety; (2) teaching and learning; (3) school community; and (4) institutional environment. Promoting inclusive school environments is core to inclusive education as students spend much of their time in school. Among other elements, an inclusive school is a one where students feel safe, valued and that they belong to. This box focuses on initiatives that primarily contribute to improving the third and fourth areas of school climate.

Organising school spaces

Many Portuguese schools implement projects to promote inclusion and global competence. They also organise the school space to create a welcoming institutional environment for all students. In a school library of *Coimbra Centro* school cluster, for example, one can see numerous references to diversity. The walls of the library are filled with flags and words in languages from countries from all continents. In a corner of the library, students can also look at a graph indicating the number of foreign students enrolled in the cluster and the countries they come from. In a school in *João de Deus* school cluster, Faro (Algarve), there are walls filled with images of human rights defenders from around the world. Each image provides short texts on the defender's actions, such as advocating for ethnic minority groups' rights or defending freedom of speech. *João de Deus* school cluster also has a room with film-

making material. During the review team's visit, secondary students who specialised in cinema were creating visual content with students with hearing impairments to raise awareness on the use of sign language.

Artistic projects can be a powerful way to engage students, create a welcoming environment and build relationships beyond the school. As part of the National Plan for Arts (PNA), *Manuel Ferreira Patrício* school cluster, Évora (Alentejo) has been implementing several artistic projects involving students from all grades. Local artists have recreated multiple famous paintings to decorate schools and engage students with art history. One school in the cluster also has film-making material to bring students together around cinematographic projects. Besides its involvement in artistic initiatives, one library in the cluster filled its walls with images showing the sign language alphabet.

Ensuring respect for diversity and promoting positive relationships within the school and beyond are fundamental to creating an inclusive school culture. *Santo António* school cluster, Barreiro (Lisbon), has implemented various initiatives to engage with families from all backgrounds and the broader community. Besides using a Roma mediator to build relationships with Roma families and improve Roma students' outcomes (see Box 3.5), it regularly organises, for example, culinary events. During these events, families from different nationalities cook food from their countries and bring it to school. Although *Manuel Ferreira Patrício* school cluster, Évora, does not have a cultural mediator, it collaborates with several local associations to promote the inclusion of students with an immigrant background and from Roma communities.

Source: Information obtained during OECD Review team visit.

That said, more needs to be done and Portugal should improve some areas within the implementation of inclusive education, especially for students with an immigrant background and students from Roma communities.

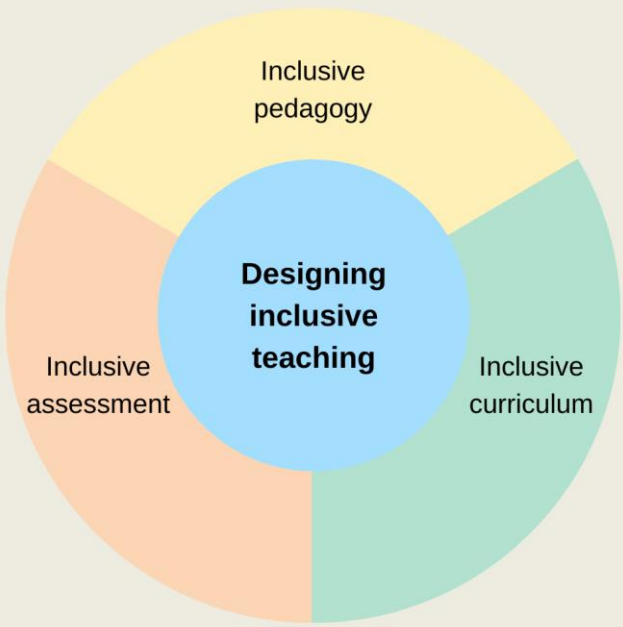
There are several resources on good practices in inclusive schools that Portugal can draw on to expand and strengthen inclusive practices and capacities within schools, starting with inclusive teaching toolkits (see Box 3.4). The Catalogue of Good Practices on inclusive schools developed by the European Trade Union Committee for Education (ETUCE, 2021[73]) is a particularly useful resource for Portugal in its move to widen inclusive practices in schools (see Annex 3.B).

Box 3.4. A toolkit for inclusive teaching

Brussino (2021[50]) has developed an evidence-based toolkit for teachers and other education stakeholders to design inclusive teaching practices in the classroom. The toolkit highlights three key elements: what teachers teach (curriculum), how they teach (pedagogy) and how they monitor student learning (assessment) (see Figure 3.7). In explaining the need for inclusive pedagogies, Brussino (2021[50]) underscores the need for teachers to understand that how they teach (pedagogy) affects what students learn and how they learn. Pedagogies affect students' learning of societal values, habits, and social and emotional skills (OECD, n.d.[74]). Pedagogies also address the question of how individual students can receive the support they need without being treated differently than other students in the classroom (Florian and Black-Hawkins, 2011[75]). Tools presented on how to develop inclusive pedagogies include:

- The Inclusive Pedagogical Approach in Action (IPAA). The IPAA is a framework designed within the Inclusive Practice Project (IPP), funded by the Scottish Government to support Aberdeen University's School of Education in redesigning its Professional Graduate Diploma in Education. The framework supports teachers in developing and evaluating inclusive pedagogical practices to address the needs of all students (Florian and Spratt, 2013[76]).
- Youcubed. Youcubed is a platform developed by Stanford University (US) that aims to educate and empower mathematics teachers to engage all students in the subject. It provides practical support to teachers via professional learning opportunities.

Figure 3.7. Key design elements for inclusive teaching



Source: Brussino (2021[50]). *Building Capacity for Inclusive teaching: Policies and Practices to Prepare Teachers for Diversity and Inclusion*, OECD Education Working Papers, No. 256, https://dx.doi.org/10.1787/57fe6a38-en.

The toolkit highlights inclusive curriculum as crucial for promoting inclusive teaching practices in the classroom. An inclusive curriculum accommodates the diverse needs, previous experiences, cultural heritage, interests and personal characteristics of all students. It engages all students in the teaching and

learning process, sees learning as a shared experience and provides equal opportunities for all learners regardless of their differences (UNESCO, 2020[77]). Brussino (2021[50]) presents concrete examples of how the curriculum can be adapted to make them more inclusive from previous studies. These include, among others:

- Stonewall's (2018[78]) illustration of geography lessons on migration that could be modified to include a focus on the push and pull factors leading diverse population groups, such as people belonging to LGBTQI+ communities or ethnic minorities, to migrate within and between countries.
- Stonewall's (2019[79]) illustration of primary school mathematics lessons, in which the wording of the problems can be modified to reflect gender identity as a way to promote diversity and inclusion for diverse population groups.

Assessment is another important aspect of learning. How student assessment and development are carried out can have a direct impact on how students view themselves and their self-esteem. Assessments that are more frequent and interactive appear to be better suited to meet diverse student needs (OECD, 2008[80]). When designing assessments, teachers should take into account the diverse needs of students in the classroom. An example could be promoting diversity in dolls to mirror diverse physical characteristics and traits in society and enhance inclusion.

Importantly, these inclusive teaching elements/strategies should be implemented in tandem with teacher preparation and support to engage in critical reflection processes and confront their own unconscious bias if they are to create learning spaces where diversity is valued and inclusion is promoted.

Source: Brussino (2021[50]), *Building Capacity for Inclusive teaching: Policies and Practices to Prepare Teachers for Diversity and Inclusion*, OECD Education Working Papers, No. 256, https://dx.doi.org/10.1787/57fe6a38-en.

At the national level, with an inclusive education policy in place that clearly articulates and supports inclusive education, Portugal could consider implementing periodic reviews of inclusive programmes in schools. Several tools have been developed that can be useful in reviewing inclusive education practices and policies including the Index for Inclusion toolkit (see Chapter 4), the Supporting Effective Teaching project, the Lao Inclusive Education Project by Save the Children (Grimes, 2010[81]) and UNESCO's set of equity indicators (2018[82]),

Provide further support to fully include students belonging to Roma communities

Promoting the inclusion of Roma people is a challenge faced by many European countries. In an overview of evidence and policy initiatives on the Roma population, Rutigliano (2020[6]) notes that Roma people are among the most marginalised groups in Europe. Insufficient actions of national governments within the EU in tackling challenges confronting Roma communities has led to NGOs stepping in to provide the support needed. Students from Roma communities face particularly significant challenges in Portugal (Chapter 1). Portugal has a national Strategy for the Integration of Roma Communities (ENICC), which shows recognition and willingness at the national level to better support their integration into society. It is important to carve out a strategy that can work with this community. A strategy that is implemented in some Portuguese schools and that could be explored further is the concept of cultural mediators.

The review team noticed during the school visits that some schools had employed cultural mediators that worked with the Roma families to build and strengthen relationships with Roma communities. Portugal should continue to build on this practice, broaden and institutionalise it in all schools to move the process of inclusion of the Roma community forward. The cultural mediator is a well-known concept and widely used strategy among institutions and organisations. It has also proven to generate positive outcomes for Roma students in Portugal (see Box 3.5). The Council of Europe recognises cultural mediation as a viable tool and designs strategies to adopt this approach across countries.[5]

Building the capacity of Portuguese schools in this way to support the inclusion of the Roma community is crucial. Impressions gained by the review team from talking to stakeholders during the online visit was that the inclusion of children and youth belonging to Roma communities in Portugal presents an important challenge. During the visit, the review team gained the impression that schools may often not know what approaches should be adopted to promote inclusion in education and society for people belonging to Roma communities.

Box 3.5. The use of Roma mediators to foster inclusion in school

At the European level, the use of Roma mediators is considered to be one of the most effective practices for reducing the gap between Roma communities and public institutions such as schools (Rutigliano, 2020[6]). The goal is not only to support students and increase their performance but also to build trust and sustained relationships between the school and families as well as to improve Roma children's well-being. For this reason, the use of mediators with a Roma background is seen as a major tool to foster Roma parents' involvement. It has proven to be crucial for the inclusion of the community as a whole. Several European countries resort to mediators in schools to foster the inclusion of Roma students (Rutigliano, 2020[6]). For example, Nordic countries are particularly active in using Roma mediators which might be considered important in maintaining Roma identity while keeping the children in mainstream schools (Helakorpi, Lappalainen and Mietola, 2018[83]).

The example of Santo António school cluster, Barreiro (Lisbon and Tagus)

Santo António school cluster has a highly diverse student population. According to the cluster's statistics, there are students from 25 different nationalities. Approximately 80% of students receiving School Social Assistance (ASE) and slightly more than 8% of students come from Roma communities. As a Priority Intervention Educational Territories (TEIP) school cluster, Santo António receives additional human resources, food support, external evaluation and training opportunities. The school has a long tradition of implementing projects related to diversity and inclusion. Among other initiatives, the cluster is part of the National Network of Intercultural Schools, the INCLUDE-ED project, which collaborates with universities and has received national and international awards for its work on inclusion and interculturality. Essential to inclusive school culture, the cluster has a team of school leaders, teachers and non-teaching staff who are strongly committed to the principles of equity and inclusion.

Some years ago, the school cluster decided to hire a cultural mediator who comes from a local Roma community. The mediator works for the whole cluster. Through progressive and challenging work, the female mediator has been instrumental in engaging and building trust with Roma families and communities as well as improving Roma students' outcomes. Among other achievements, absenteeism has decreased, more Roma girls stay in school until the age of 18, and projects targeted at improving the inclusion of Roma women have been implemented. There are also some Roma parents studying at night in school.

Source: Information obtained during OECD Review team visit; Rutigliano (2020[6]), *Inclusion of Roma Students in Europe: A literature review and examples of policy initiatives*, https://doi.org/10.1787/8ce7d6eb-en; Helakorpi, Lappalainen and Mietola (2018[83]), "Equality in the Making? Roma and Traveller Minority Policies and Basic Education in Three Nordic Countries", https://doi.org/10.1080/00313831.2018.1485735.

The review team considers cultural mediation as a viable option that Portugal could explore and deepen. Many other educational contexts, such as in Colorado, United States, use such specialists to support students from diverse backgrounds (see Box 3.6) During interviews conducted with stakeholders, the

review team gained the impression that Roma communities (or leaders) are committed to supporting their communities. There are several educated and brilliant young Roma people who can be mobilised as cultural mediators, serving as mentors and role models to younger generations. Decades worth of studies have shown that similarity attracts, which is a phenomenon known as homophily (Block, 2018[84]; Shrum, Cheek and Hunter, 1988[85]).

Considerable trust has been built over the years between mainstream Portuguese society and the Roma community. Portugal should consider deepening trust within the Roma community. A focus on trust can reshape integration and ultimately strengthen the foundations of the welfare state. Trust has been argued to be the "glue" binding people together in the social contract that forms the foundation of the welfare state (Kumlin, Stadelmann-Steffen and Haugsgjerd, 2018[86]). Research further indicates that ethnic diversity does not threaten the social trust and support for the welfare state; what matters is the quality of intergroup relations as well as the level of segregation of ethnic groups (Uslaner, 2018[87]).

Box 3.6. The cultural mediator – Colorado Department of Education, United States

In Colorado, United States, the Department of Education makes use of cultural mediators to facilitate successful communication with students and families. A cultural mediator is an individual who helps translate between the culture of the school environment and the child's family to enhance understanding, share information, and create a relationship that supports families as full participants in the assessment process and delivering education services. A cultural mediator should have a background in the field of education, be knowledgeable about child development and special education policy/procedures, be available regularly and should not be a member of the child's family. A cultural mediator is an individual who is a valued member of the community, with an understanding of the language and culture of the target family. They should be proficient in the oral and written language of the mainstream culture as well as in the student's language. A cultural mediator should be willing to take direction and maintain confidentiality, as well as be accepted by the family (and community) and be skilled in interpersonal relations.

In Colorado, cultural mediators can operate in a diversity of settings, including public organisations such as hospitals, health clinics, school districts, county agencies, migrant health facilities, interpreter registry colleges, universities and Head Start programmes. Head Start programmes are a US government initiative to promote school readiness of infants, toddlers and preschool-aged children from low socio-economic status families. Head Start programmes engage parents or guardians in promoting positive relationships, with a focus on family well-being.

These programmes can also be found in community organisations such as churches, local gathering places and service organisations. Specific tasks requiring cultural mediators in school settings are meetings, observations, instruction and testing, as well as psychological, health, social and support services.

Sources: Colorado Department of Education (n.d.[88]), www.cde.state.co.us (accessed on 24 November 2021); Moore, Beatty and Pérez-Méndez (Moore and Bell, 2017[89]), *The Right to Be Racist in College: Racist Speech, White Institutional Space, and the First Amendment*, https://doi.org/10.1111/lapo.12076.

Continue to review school textbooks in relation to content, language and illustrations to reflect current student profiles

The review team was struck by teachers' efforts, in most visited school clusters, to modify curriculum content to meet the needs of diverse students including students with an immigrant background and from

Roma communities. In moving forward with its inclusive and equitable education agenda, Portugal should continue to build on the good practice that exists in the system. One particular school cluster provided an outstanding example of how to design an inclusive book for students with SEN (see Box 3.7). Such a practice could be scaled up to benefit these students across the country. School textbooks are key sources for the study of school disciplines and are a central tool for conveying the curriculum. Research suggests that textbooks have traditionally been used to strengthen nation-building and collective national identity (Ahonen, 2012[90]; Rantala et al., 2020[91]). The selection of content to be taught in classrooms is tied to the socio-political context and therefore includes dominant culture perceptions and does not comprehensively cover those in the margins. Based on the dynamics of exclusion and inclusion, or the hidden curriculum, the curriculum reflects the broader perceptions that dominate society.

Box 3.7. Inclusive books for students in Coimbra Centro school cluster

Reference schools (escolas de referência)

Following the closure of nearly all private specialised institutions for students with SEN, some mainstream schools became reference schools for students with SEN.[6] These schools have considerable expertise in one or several domains related to students with SEN or early childhood intervention, and support other schools in the same or another geographically close school cluster. Reference schools receive extra resources from the MoE. There exist three types of reference schools:

1. Reference schools for bilingual education, specialised in supporting deaf students. There are ten school clusters with such schools across the country.

2. Reference schools in the area of vision, specialising in supporting low-sight and blind students. There are 27 school clusters with such schools across the country.

3. Reference schools for early childhood intervention, whose scope of action is broader and aims to identify children who need such intervention, support their families and facilitate the coordination between relevant social services. There are 32 school clusters with such schools across the country. These schools are part of a national network of early childhood intervention divided by a national commission, regional sub-commissions and local intervention teams.

These schools and their respective functions and resources are described in Decree Law No. 54/2018.

Coimbra Centro school cluster's reference school

Coimbra Centro school cluster, Coimbra (Centre), has a reference school both for bilingual education and in the area of vision. As such, the school has extra resources and expertise to support the learning and the inclusion of some students with SEN. In particular, the school has specialised teachers, such as sign language teachers who translate class content and tutor deaf students. The school provides additional relevant equipment such as machines to translate textbooks and other material into braille.

Inclusive books for students with visual and hearing impairments

Thanks to its reference school's expertise and equipment, *Coimbra Centro* school cluster is developing a series of inclusive educational books for primary school students. The books contain stories with drawings and paintings. The text has been translated into braille for students with visual impairments. Most printed images have reliefs made of different materials, which allow students to have a sensory experience through touch. In addition, the books contain QR codes for students with hearing impairments. When scanned with a smartphone or mobile device, the codes direct the reader to a YouTube video with a sign language interpreter. The books will be soon presented to the whole school cluster and, later on, shared with other school clusters.

Source: Information obtained during OECD Review team visit.

Recent changes in the Portuguese national curriculum have brought additional demands to teaching and learning and require adaptation. However, the review team gained the impression in discussions with stakeholders that school textbooks still have underrepresentation of minority social groups in, for example, history education, which could contribute to hindering efforts to promote diversity and inclusion in schools and society. To borrow the words of Nieto and Bode (2011, p. 3[57]) inclusive education is "far more than simply altering the curriculum to reflect more brown and black faces or adding assembly programmes on diversity". It requires real actions including cautiously choosing content, using neutral language and illustrations that represent the diversity of the student body. As Goodson reflects:

> *"It is precisely because we are dealing with a 'State system' that curriculum construction has such central significance. Patterns of resource allocation, financial distribution, status allocation and career construction are all directly related to a system where curriculum definition, particularly in 'subject' or 'basics' style, has a central position (Goodson, 1995, p. 8[92])."*

It is therefore important to examine the particularities of the curriculum as they reveal what a state values within a certain space and time. In the absence of this, the current dominant practices in the school classroom can have broader and long-lasting consequences for diversity and inclusion in the education system. For example, findings from a recent Portuguese study of how geography teachers view geography textbooks (Esteves, 2019[93]) echo the need for change in school textbooks. In this study, geography teachers emphasised the need for a permanent update of scientific contents and data, learning activities and the promotion of the autonomous work of students. Teachers also found it challenging to find approved textbooks that are valid for at least six years. Reasons provided included the fact that some of these (geography) textbooks contain outdated statistical data. Portugal should undertake concentrated efforts to continue to review school textbooks and ensure that curriculum modification and adjustment become a widespread practice in order to meet not just the specific needs of students with SEN but also other aspects of diversity including students with an immigrant background and Roma students.

Expand the National Strategy for Citizenship Education to include social justice education

As part of Citizenship Education, Portugal has included topics that aim to introduce students to a broad range of issues around diversity and cultural awareness to develop respect and acceptance of other cultures, ethnicities and national minorities as well as gender identity and sexual orientation. While these are important first steps, schools need to ensure that Citizenship Education offers a holistic approach to the questions of diversity, equity and inclusion. The Citizenship Education Framework may be uncritically operating at a level of awareness that does not develop clear and fair systems actively affirming the rights of diverse students (including students with an immigrant background and students belonging to ethnic groups or national minorities) as well as developing students' political analysis of the nature of discrimination and prejudice through the lens of equity. The review team noticed during the school visits that the principle of inclusion is widely understood in schools, and children and young people were aware of this and the ways this is influencing their thinking about differences. Portugal needs to build on this sound awareness that clearly exists to push Citizenship Education further by making sure schools introduce a critical perspective to Citizenship Education.

According to Nieto and Bode (2011, p. 5[57]):

> *"Multicultural education does not simply involve the affirmation of language, culture and broader aspects of identity. Multicultural education not only affirms issues of identity and difference but also assertively confronts issues of power and privilege in society. This means challenging racism and other biases as well as the inequitable structures, policies, and practices of school and, ultimately, of society itself."*

This means raising awareness and empowering students to think critically and speak up for their rights. Multicultural education is about creating a democratic environment for teaching and learning, and embracing an anti-racist curriculum aiming to improve students' learning experiences. Portugal has achieved impressive feats in the widespread awareness and acceptance of the principles of diversity and inclusion upon which national education policies are based. It needs to ensure that Citizenship Education addresses more critical multicultural issues. This is the next phase of development to build on the good practices that exist in the field and drive school-wide changes. Box 3.8 elaborates more on critical multiculturalism and suggests some learning resources to implement this approach in the classroom.

Box 3.8. Intercultural Education through Social Justice Education

Often, interpretations of the concept of interculturality (multiculturalism) result in a mix of classroom activities illustrating different cultures and festivities, books in a variety of languages, dolls of a different ethnicity or hosting days focused on the food of a culture. This has been termed the first approach to multiculturalism (Banks, 2010[94]). These conceptions of multiculturalism lack reference to the academic expectations of students and tenets of socially just education. Conceptions of socially just education emphasise teachers developing students' political analysis of the nature of discrimination and prejudice they experience through the lens of equity.

Educators often miss opportunities to go beyond the first-level approach to multicultural education or culturally responsive teaching (CRT) and model social justice and teacher activism, which enables students to reflect on issues of privilege and power. At best, educators recognise the lack of true multicultural understanding; at worst, they stereotype various cultures in terms of language, ethnicity and traits.

Researchers have provided some useful resources on how educators can teach effectively to impact students' outcomes. Some of these resources include:

- Recent academic research such as the works of Acquah and Commins (2017[95]) and Acquah, Szelei and Katz (2020[29]).
- The National Association for Multicultural Education (NAME), which provides concrete resources on four dimensions of classroom practices that encourage and enable all students to participate and engage with lessons: curriculum, assessment of learning, pedagogy and intellectual challenge. These resources highlight interactions between students and teachers, and among students, across and within these four dimensions, with the main question for teachers being: "What can I do in my own classroom and school to promote diversity and inclusion?": https://nameorg.org/learn/ (accessed on 17 December 2021).
- International Coalition for Multilingual Education and Equity (ICMEE), which provides over 50 free eWorkshops to choose from: https://cehs.unl.edu/icmee/eworkshop/ (accessed on 17 December 2021). These eWorkshops cover training on how to improve teaching and learning for bi/multilingual students across K-12 grade levels and classroom contexts. They were developed for professional learning communities of educators to engage collaboratively and are best suited for groups of 3-10 educators interested in learning together. Professional learning certificates are available on completion. There are also flexible completion options to choose from and any individual or group can join.
- Christine Sleeter's videos on how to promote social justice education: https://www.youtube.com/user/csleeter/videos (accessed on 17 December 2021).

Expand continuous professional learning opportunities for teachers to support diversity and inclusion

In Portugal, teachers are required to participate in professional in-service training for at least 12 hours every year (see Section on Continuous Professional Learning). Despite this, TALIS 2018 data indicates that, in 2018, Portugal was among the two EU countries with the lowest levels of teacher participation in professional learning, well below the OECD average (OECD, 2019[13]). Across OECD countries, teachers participated in different types of professional learning activities, and a higher percentage of Portuguese teachers rated these different types of professional learning activities to be effective compared to the OECD average. These areas include professional learning opportunities being adopted to meet teacher's personal development needs (Portugal 92.9%; OECD 78.1%); appropriately focused on the content needed to teach the teacher's subject (Portugal, 83%; OECD, 71.9%), provided opportunities for active learning (Portugal, 85.3%; OECD, 77.9%); provided opportunities for collaborative learning (Portugal, 83%; OECD, 74%); and focused on innovation in the teacher's teaching (Portugal, 76.8; OECD, 64.8) (OECD, 2019[13]).

However, when looking at content-specific professional learning activities attended by teachers included in TALIS 2018, Portuguese teachers reported lower attendance in comparison to OECD averages in professional learning activities with content relevant for diversity, equity and inclusion. In particular, some of the professional learning areas where a lower percentage of Portuguese teachers responded to have attended training include i) teaching in a multicultural and multilingual setting (Portugal, 14%; OECD, 21.9%); ii) communicating with people from different cultures and countries (Portugal, 17.7%; OECD, 19.3%); iii) teacher, parent/guardian cooperation (Portugal, 27.2%; OECD, 35.1%); iv) teaching students with SEN (Portugal, 30.5%; OECD, 42.8%); and v) approaches to individualised learning (Portugal, 29.6%; OECD, 46.6%). This data corroborates conclusions drawn from interviews to suggest that there is a lack of comprehensive professional learning on diversity, equity and inclusion in Portugal.

Portugal should consider providing professional learning focused on teaching in multicultural and multilingual classrooms and cultural diversity and inclusion. Resources already exist that can be mobilised to support this, such as the schools' association centres and university departments of initial teacher education. Some forms of collaboration between researchers at teacher education departments and the schools' associations training centres could be promoted to design and implement diversity, equity and inclusion-focused courses. This could stimulate powerful synergies and ensure that inclusive education becomes a continuous process of educational transformation. The provision of expanded professional learning for inclusion will need careful planning, coordination and local leadership. The review team recommends that such arrangements are accompanied by the provision of incentives such as the ones below:

i. Providing release time during regular working hours to participate in professional learning activities. This arrangement could ensure teachers are motivated to participate in these activities.
ii. Providing compensation for expenses for attending professional learning activities.
iii. Putting in place mechanisms that will ensure the transfer of skills and knowledge acquired through professional learning activities through local coordination and leadership. This can be achieved through various initiatives such as action research, classroom/school visits, collaborative curriculum development etc. (see Box 3.9) for more details on this and how to orchestrate them).

During the visits to Portuguese schools, the review team gathered considerable evidence of staff within schools supporting one another. However, the team heard no examples of planned school- or cluster-based programmes to promote professional learning. Portugal could draw on successful experiences from other educational contexts. The Catalogue of Good Practices on Inclusive Schools (ETUCE, 2021[73]) Annex 3.B (mentioned above provides outstanding examples in this area. Furthermore, it is important that senior staff in schools provide effective leadership to drive these developments.

Box 3.9. The Alberta Teachers' Association: Professional learning activities for professional growth

In Alberta, Canada, the Alberta Teachers' Association (ATA) presents various professional learning activities that teachers can undertake, including reading professional journals, implementing new practices in the classroom and joining professional organisations. Professional learning activities can be undertaken individually or collaboratively as part of a professional learning plan. The Alberta Teacher's Association has moved away from professional learning focused on individual development to school-based activities such as coaching, partnerships and team/group development. Some of the professional learning activities provided by ATA include:

- **Action Research**: ATA encourages action research as a process of professional learning. Educators begin this process by asking how a current practice might be improved. They then study the relevant literature and research to select an approach that might improve the current practice. Teachers can use their classrooms as research sites by investigating their own teaching through experiments to see what approach is most effective in facilitating cooperative learning among students.
- **Classroom/School Visit**: ATA encourages teachers to visit colleagues teaching in other classrooms to view innovative teaching practices, and expand and refine their own pedagogical strategies. However, in order for this to happen, school boards must be prepared to engage substitute teachers.
- **Collaborative Curriculum Development**: ATA encourages collaborative curriculum development. By working together, teachers can design new planning materials, teaching methods, resource materials and assessment tools, and they can delve deeply into their subject matter.
- **Conferences**: Conferences provide effective professional learning opportunities, particularly when they are part of a teacher's ongoing professional learning plan. Teachers should look for conferences that relate to their field of expertise to attend.
- **Curriculum Mapping**: ATA encourages teachers to use curriculum maps in their learning. Curriculum maps are tools to organise teaching. They outline a sequence for delivering content and provide a clear scope for what should be taught to all students as specified in the provincial curriculum. A curriculum map can also serve as a tool for collecting data about the implemented curriculum in a school and in a district—the instruction that students are receiving. By mapping what is actually taught and when, and aligning it with assessment data, teachers can modify instruction.
- **Education Exchange**: International teacher exchange is a programme supported by the European Commission (European Commission/EACEA/Eurydice, 2021[12]). The ERASMUS teacher exchange can be explored to provide Portuguese teachers exposure to cultural and linguistic diversity as well as intercultural competence, which are essential for promoting inclusive education.

Source: The Alberta Teachers' Association (n.d.[96]), *Professional learning activities for professional growth*, https://www.teachers.ab.ca/For%20Members/ProfessionalGrowth/Section%203/Pages/Professional%20Development%20Activities%20for%20Teachers.aspx (accessed on 24 November 2021).

Long-term policy recommendations

Implement multicultural teacher education to mainstream diversity, equity and inclusion courses

Inclusive education cannot materialise without teachers. Teachers cannot teach what they do not know. Consequently, efforts at sustaining inclusive education would require a meaningful transformation in how teachers are trained. Thus, in the long term, consideration should be given to reforming the ITE curriculum to reflect today's classroom demands. This is not a suggestion to abandon the traditional model of teacher education in Europe that emphasises the combination of subject knowledge, pedagogical theory and sufficient classroom practice (European Commission/EACEA/Eurydice, 2021[12]). Rather, it is proposed that issues of diversity, equity and inclusion are made visible and required for ITE to ensure that topics are incorporated in general courses by all teacher educators.

Internationally, there is a call for teacher education programmes to prepare teachers for the challenges of the 21st century classroom. Research shows that multicultural education courses can have a positive impact on teachers' attitudes and dispositions (Acquah and Commins, 2013[97]; Banks, 2010[94]; Gay, 2010[98]; Ladson-Billings, 2009[30]). As a result, attention has been paid to the potential of multicultural teacher education to improve teaching and learning for diverse students (Banks, 2010[94]; Gay, 2010[98]; Ladson-Billings, 2009[30]). In several countries and institutions, ITE programmes and educators have altered courses, curricula and field experiences as a way to develop teacher candidates' cultural competence (Acquah and Commins, 2013[97]; Acquah, Szelei and Katz, 2020[29]; Sleeter and Owuor, 2011[99]; Ukpokodu, 2011[100]). Evidence also presents how these courses should be designed and taught (Acquah and Commins, 2013[97]; Acquah, Szelei and Katz, 2020[29]; Sleeter and Owuor, 2011[99]; Ukpokodu, 2011[100]). Several online resources guide how to design and implement courses on diversity and inclusion. Also, Brussino (2021[50]) provides a comprehensive analysis of ways and strategies through which teachers can design inclusive teaching practices in the classroom and foster an inclusive learning environment for all students.

At the European level, a project co-funded by the ERASMUS+ Programme of the European Union seeks to develop a model for a renewed ITE curriculum to promote supportive and empowering multilingual pedagogies, which could serve as a useful resource for Portugal (ETUCE, 2021[73]).[7] In the longer term, the aim should be to develop single courses to prepare all teachers to meet the full range of diverse student needs. This might require revising the ITE curriculum and incorporating current and new thinking on diversity, equity and inclusion. This will require national policy and support as well as careful planning, coordination and leadership.

The Catalogue of Good Practices of Inclusive Schools (ETUCE, 2021[73]) provides several resources and successful projects on transforming initial teacher education for diversity and inclusion. Portugal could benefit from exploring potential interventions that fit their local context and culture for implementation in the long term.

Research shows that the process of becoming culturally competent begins with the acquisition of a knowledge base about cultural and linguistic diversity in education (Banks, 2010[94]; Ladson-Billings, 2009[30]; Lucas and Villegas, 2013[101]). This can be derived from the extensive literature on culturally relevant teaching practices, which addresses a range of topics related to diversity including, among others, historical perspective, culture and identity in education, cultural diversity in curricula, educational equity and social justice (Banks, 2010[94]; Gay, 2010[98]; Nieto and Bode, 2011[57]). Cultural competence can also be derived from participation in diversity, equity and inclusion-related courses (Acquah and Commins, 2013[97]; Acquah, Szelei and Katz, 2020[29]). Without this training and knowledge, most teachers feel unprepared to deal with culturally and linguistically diverse classrooms as international research and data show.

Improve the recruitment, retention and attractiveness of the teaching profession to strengthen inclusive education

The recruitment, retention and evaluation of teachers have consequences for the stability of the teaching staff in schools. Teacher turnover also has implications for expertise in schools. Both stability and expertise within the teaching force are important for inclusion measures in schools. For instance, research suggests that newly graduated teachers are particularly prone to leaving the profession (Cooper and Alverado, 2006[102]; Luekens, Lyter and Fox, 2004[103]) because they are likely to find themselves working in challenging environments, such as educating students from diverse backgrounds, without prior training. In these school settings, teachers often feel not appreciated and valued, and have fixed-term contracts and inadequate salaries.

As discussed previously in this chapter, the Portuguese teaching force is gradually ageing. The average age of a Portuguese teacher is 50. If not addressed, this can impact the impressive momentum Portugal has achieved with its inclusive education movement. Portugal might consider reforming the current teacher recruitment structure and work contract in general. In this regard, the OECD review by Liebowitz and colleagues (2018[11]) of school resources in Portugal becomes important. In particular, their recommendation on how Portugal should respond to the shifting teacher demographics is compelling. Here, an overview of the recommendations by Liebowitz et al. (2018[11]) is presented as a starting point for how Portugal could ensure some rate of renewal within the teaching profession while incentivising older teachers to retire. These recommendations include that Portugal should:

- consider pursuing a flexible retirement policy
- pay good salaries to teachers in the initial years of their career
- explore intensive residency models for teacher preparation
- adopt approaches that will better match teachers' skills and knowledge with schools
- introduce a formal induction for novice teachers
- develop teacher communities of practice
- rethink educator career development, including re-imagining formal leadership roles as professional pathways.

This current report supports the recommendations of Liebowitz et al (2018[11]) and strongly encourages Portugal to consider this report that provides a much more in-depth analysis of the issue, recognising that there are many more aspects of implementation that need to be considered. Moreover, this reform process should be done in consultation with teacher trade unions. They should be regularly consulted and involved in the process.

Progress towards more inclusive and equitable education in Portugal would require greater local say in teacher recruitment. Localising teacher recruitment will directly impact equity and inclusion in education and promote teacher accountability and professionalism. When teacher recruitment is localised, teachers feel a sense of responsibility towards the community in which they work. This connection to the community can stimulate the desire to work for all students, including diverse students. In addition, these community and school partnerships can contribute to promoting dialogue and a socially cohesive climate, both of which have implications for equity and inclusion in municipalities. A cohesive society directly translates into a school setting thereby promoting a more solid equitable and inclusive education where the aspirations and contributions of every student are valued.

Promote the recruitment of teachers from diverse ethnic, cultural and linguistic backgrounds

Evidence shows that the Portuguese teaching force has a very small number of teachers with an immigrant background. Portugal should consider taking concrete steps to promote diversity within its teacher force to

realise the vision of inclusive education as projected by the 2018 legislation (see section on Context and main features). Recent data from DGEEC (2021[67]) show that during the 2019/2020 school year, about 3.5% of pre-tertiary public school teachers had a foreign nationality. The share of foreign teachers has not changed significantly since the 2010/2011 school year, oscillating between 3.4% and 4.1% (European Agency for Special Needs and Inclusive Education, 2011[47]). While it is encouraging to see that foreigners are represented in the teaching workforce to some extent, data shows that this number is relatively low, meaning the teaching force within Portugal could benefit from more diversity. Moreover, of a total of 1 302 foreign teachers during the 2019/2020 school year, the large majority was from European countries, including Spain (270), Italy (130) and Germany (120), in addition to Brazil (192), and a small number were from Portuguese-speaking African countries. About 24 were from Angola and 16 from Mozambique. The number of teachers from other African countries was low, with less than ten for each country. Besides China (23), the number of teachers from Asian countries was also significantly low (less than ten for each country) (DGEEC, 2021[67]).

Research suggests that, in European countries, the norms and values of the cultural majority form the foundation of educational institutions, and academic success is defined based on these values (Moore and Bell, 2017[89]). Moreover, the majority of teachers are from the dominant culture (Donlevy, Rajania and Meierkord, 2016[104]), which could make it more likely that teachers' dominant norms and values still largely shape the classroom environment. These predominately monocultural educational *spaces* enable the reproduction of power and privilege (Moore and Bell, 2017[89]) given that students are often rewarded for conforming to prevailing school norms (Chambers et al., 2014[105]). To break the cycle of inequity, the education system should directly address diversity in education. This starts with attracting more ethnically, culturally and linguistically diverse students into teacher education programmes (Carver-Thomas and Darling-Hammond, 2017[69]) and then retaining them in the teaching profession.

Research illustrates the importance of teacher diversity because of the substantial benefits teachers with diverse backgrounds provide to all students, especially students with diverse backgrounds themselves (Carver-Thomas, 2018[68]; Carver-Thomas and Darling-Hammond, 2017[69]; Gershenson et al., 2017[70]). For example, having teachers with an immigrant background in the classroom has various impacts on students with an immigrant background, including:

- boosting overall academic performance
- improving reading and mathematics test scores
- improving graduation rates
- increasing aspirations to attend higher education
- reducing the number of absences.

Diverse teachers can also have a significant impact on the rest of the classroom. Ladson-Billings (2009[30]) explains that having more teachers with diverse backgrounds can help dispel myths and build cross-cultural respect, relationships and understanding. Expanding on the benefits all students accrue from having diverse teachers, Cherng and Halpin (2016[106]) use data sets containing over 50 000 student reports on over 1 680 teachers to understand students' perceptions of their teachers. Specifically, they measure what they called the 7Cs: challenge, captivate, consolidate, care, control, clarity and confer. Their findings indicate that even when controlling for student demographics, academic characteristics and teacher characteristics, all students provide higher ratings for teachers with an immigrant background than teachers without such a background (Cherng and Halpin, 2016[106]).

Although Cherng and Halpin (2016[106]) do not look into reasons for these results, there is some evidence to suggest that teachers from diverse backgrounds tend to have more multicultural awareness, which leads to more positive and connected classroom environments (Cherng and Davis, 2017[107]). These classroom environments tend to be a safe place to learn and grow, thus stimulating student engagement and participation (Banks, 2010[94]; Ladson-Billings, 2009[30]). Moreover, teachers from diverse backgrounds can

provide positive benefits to all students because these teachers are more inclined to purposefully speak about topics surrounding inequities and social justice (Cherng and Halpin, 2016[106]). Providing these safe and constructive conversations helps students more accurately understand society, form positive worldviews and positively contribute to social justice.

Portugal should consider building the capacity of its teaching force by improving the diversity of its teacher supply pipeline. The goals in this sense would be to attract, support, develop and retain educators of diverse ethnic, gender, cultural and linguistic backgrounds. In previous decades, numerous governments have launched a variety of minority teacher recruitment programmes and initiatives, including future educator programmes in high schools, partnerships between community colleges, career ladders for paraprofessionals in schools and alternative teacher certification programmes (Hirsch, Koppich and Knapp, 2001[108]; Liu et al., 2007[109]; Rice, 2003[110]). Portugal can pursue this goal in ways similar to those implemented by the State of Connecticut, United States, which launched the Minority Educator Initiative to develop concrete, actionable plans and goals to address these needs (Box 3.10).

Box 3.10. Strategies to increase the ethnic and linguistic diversity of the teacher workforce in the state of Connecticut, United States

To tackle minority teacher shortages in the United States, the state of Connecticut adopted an initiative to develop concrete, actionable plans and goals to put in place minority teacher recruitment policies. In 2016, the State Board of Education (SBE) adopted a five-year comprehensive plan called Ensuring Equity and Excellence for All Connecticut Students, initiating the development of measurable strategies to increase the number of educators from different ethnic, cultural and linguistic backgrounds. This plan aimed to increase the percentage of teachers from diverse backgrounds from 8.3% to 10% by 2021 (this translates to 1 000 certified educators with diverse backgrounds within 5 years). In line with this goal, the Connecticut State Department of Education (CSDE) Talent Office implemented several strategies to attract, support and retain high-quality teachers and school leaders.

To support this Five-Year Plan to recruit, develop and retain a highly effective and diverse workforce. and address and diminish the state-wide mismatch between teachers and students, in collaboration with the Center for Public Research and Leadership (CPRL) at Columbia Law School, the CSDE mapped promising practices and located models of success across five critical stages of the educator career continuum. These stages are:

- Cultivating an Interest in Teaching
- Ensuring Educator Preparation Programme Success
- Obtaining Licensure and Certification
- Hiring Practices and Successful Employment
- Supporting and Retaining High-Quality Educators.

The promising practices and effective models identified are made available to leadership, faculty at teacher preparation institutions, local school districts and school cluster managers through Connecticut's official state website (EdKnowledge). Education stakeholders can access the online repository to seek potential ideas for replication across the stages of the educator continuum.

School districts interested in learning how these state-level policies can be implemented within a school district are referred to the Stratford Board of Education Minority Teacher Recruitment Plan that have clearly defined areas of priority including:

- Recruitment and Retention Plan
- Diversity and Inclusion Plan

- Minority Teacher Recruitment Policy
- Diversity, Inclusion, Equity, and Social-Emotional Learning (DIESEL)
- Equity and Diversity Policy
- Anti-Racism- Confronting Racism in Schools Policy.

As an example, under the "Recruitment and Retention Plan", the board of education specifies clear and measurable goals, objectives and strategies, such as:

Goal 1: Diversity-Recruit diverse and culturally competent administrators, teachers and staff.

- Sub-goal 1.1: Update the Minority Teacher Recruitment Policy.

Source: Connecticut's Official State Website (2015[111]), *EdKnowledge - Strategies and Resources for Building a Racially, Ethnically, and Linguistically Diverse Educator Workforce*, https://portal.ct.gov/SDE/Talent_Office/EdKnowledge---Strategies-and-Resources-for-Building-a-Diverse-Educator-Workforce (accessed on 24 November 2021); Stratford Board of Education (n.d.[112]) *Stratford Public Schools: Minority Teacher Recruitment Taskforce Strategic Plan for Diversity and Inclusion*, https://www.stratfordk12.org/human-resources/minority-teacher-recruitment-initiatives (accessed on 24 November 2021).

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Annex 3.A. Master of Arts Degrees in Education and Teaching for specific curriculum subjects (Universities of Coimbra and Lisbon) (2020/2021)

Annex Table 3.A.1. Master of Arts Degrees in Education and Teaching for specific curriculum subjects (Universities of Coimbra and Lisbon) (2020/2021)

MA Degrees in Education and Teaching (*curriculum* subjects)		SMK (≥ 18 ECTS)		GES (≥ 18 ECTS)		SSD (≥ 30 ECTS)		STP (≥ 42 ECTS)	
		No. Courses	ECTS	No. Courses	ECTS	No. Courses	ECTS	No. Courses	ECTS
University of Coimbra	Portuguese	2	20	5	20	4	32	1	48
	Portuguese and Latin								
	Portuguese and Foreign Language								
	English								
	English and Foreign Language								
	Philosophy								
	History								
	Geography								
	Mathematics	4	24	4	18	4	30		
	Biology and Geology								
	Physics and Chemistry	6							

	Physical Education	4	22			2	32	2	
University of Lisbon (Institute of Education)	Portuguese and Latin	3	18	4	24	5	36	3	42
	Portuguese and Foreign Language								
	English and Foreign Language								
	Philosophy	2				3	30		48
	History								
	Geography	3				5		4	
	Economy								
	Mathematics								
	Biology and Geology								
	Physics and Chemistry								
	Technology (ITC)								
	Arts								
	Physical Education	5	18	6	24	4	30	1	

Source: Ministry of Education (2022[1]), *OECD Review for Inclusive Education, Country Background for Portugal*.

Annex 3.B. ETUCE Catalogue of Good Practices

The Catalogue of Good Practices is a recently developed comprehensive and exhaustive resource guide that has been gathered through various European Trade Union Committee for Education (ETUCE)'s projects, implemented in the period 2017-2021. The main aim of this Catalogue of Good Practices is to "create a resource on building and maintaining sustainable inclusive learning environments in various national and local contexts with the view to provide education trade unions and their affiliates with concrete and innovative tools and methods of social inclusion in the education and teaching profession" (ETUCE, 2021, p. 3[73]).

Annex Table 3.B.1. Inclusion in education settings: National and regional practices

Title	Country/region	Implementing organisation	Period of implementation	Description	Keywords	Links
Support for learning and school	Finland	Valteri, national Centre for Learning and Consulting operating under the Finnish National Agency for Education	Ongoing	The Valteri Centre for Learning and Consulting offers support for learning and school attendance to pupils, their families, teachers and other education staff. Children and young people in receipt of general, intensified and special support benefit from our services. The aim is to enable as many pupils as possible to go to school in their home municipality and in their neighbourhood school.	Inclusion in schools Initial and continuous professional development Support to facilitate access to quality education	Online Database of Good Practices Other links: https://www.valteri.fi/en/
What's my name?	Flanders (Belgium)	A partnership between	2016-2017	Project "What's my	Awareness raising on	https://www.cultuurkuur

		museums and schools in the region of Ghent: Richtpunt campus Gent Henleykaai (school), MUS-E Belgium STAM Stadsmuseum Museum Dr. Guislain (museums)		name": addressing students in the age of 15-16 years in the city of Ghent, to raise awareness about identity in a context of growing diversity and growing polarisation.	diversity and identity Project	.be/project/whats-my-name
Learning communities	Spain	Partnerships between schools and key stakeholders	Ongoing	Learning community schools (Escuelas de Comunidad de Aprendizaje): some schools in Spain participate in a project called "Learning community", based on the whole-school approach. 'Learning communities' is based on a set of educational actions aimed at social and educational transformation. Learning Communities involve all people who directly or indirectly influence the learning and development of students, including teachers, family, neighbourhood organisations and locals, etc. The main aim is to achieve successful education for all children and young people, as well	Whole-school approach Cooperation with Stakeholders Social cohesion Education for all	https://comunidadesdeaprendizaje.net/centros-en-funcionamiento/llista_cda/ https://comunidadesdeaprendizaje.net/

				as improved social cohesion.		
Embracing diversity in vocational schools	Netherlands	Network on Citizenship MBO Council	2014 onwards	The starting point of the Network on Citizenship in vocational education and training in the Netherlands is that the diversity in vocational schools should be considered as an asset. A dedicated website provides a series of material that can be used in the classroom discuss diversity, citizenship education and inclusive education.	Teaching materials Discuss diversity and inclusive education in the classroom	https://burgerschapmbo.nl/lesmateriaal?filter=lesmateriaal

Source: ETUCE (2021[73]), *Catalogue of Good Practices of Inclusive Schools*, https://www.csee-etuce.org/en/projects/education-trade-unions-and-inclusive-schools-embracing-diversity-in-education/4432-project-introduction-2 (accessed 17 November 2021).

Notes

[1] "Otherness" is a term used in the social sciences and humanities to connote the way people tend to view others (people) that are different from themselves. The term can be used in a general and neutral way to signify that which is fundamentally different or can attribute negative characteristics to other individuals or groups of people, thus setting them apart as representing that which is considered to be inferior.

[2] Percentages in this paragraph indicate the ratio of courses within the curricula that should focus on this specific subject area.

[3] For example, the Portuguse National Association for Gifted Students (*Associação Nacional Estudo e Intervenção na Sobredotação*, ANEIS), which is part of the European Talent Support network, designs and gives training on gifted education to teachers and other stakeholders. ANEIS also conducts research and advocacy on gifted education-related issues. See: https://www.aneis.org/ (accessed on 24 November 2021).

[4] See: UNESCO's Glossary: https://learningportal.iiep.unesco.org/en/glossary/educational-micro-planning (accessed on 24 November 2021).

[5] See: https://www.coe.int/en/web/lang-migrants/linguistic-and-cultural-mediation (accessed on 24 November 2021).

[6] See: DGE website for list of reference schools: http://www.dge.mec.pt/recursos-organizacionais-especificos-de-apoio-aprendizagem-e-inclusao-0. (accessed on 24 November 2021).

[7] See: http://listiac.org/ (accessed on 24 November 2021).

4. Promoting school-level responses to student diversity

This chapter examines ways in which Portugal's commitment to respond to student diversity by promoting equity and inclusion in education is reflected in practices and organisational arrangements at the school level. It argues that, while there is widespread commitment to these principles across the education system, practices in schools vary considerably. There are, however, examples of effective practices that can be built upon. Attempts to address these challenges point to the importance of providing powerful forms of professional learning that will support the promotion of inclusive practices. In addition, there is need for professional learning opportunities for those in leadership roles within schools. There is a lack of local area coordination of efforts to mobilise the potential that exists in order to create a more effective middle tier. There is also a need to strengthen strategies for monitoring and evaluating the implementation and impact of policies.

Context and features

Portugal is internationally recognised for its progressive legal framework in relation to equity and inclusion in education (All means all, 2018[1]). Since Decree Law No. 3/2008 was introduced over a decade ago, special schools have been transformed into Resource Centres for Inclusion (RCIs), tasked with supporting their former students, who are now placed in mainstream schools. This pathway continued significantly with the Decree Law No. 54/2018 on inclusive education, which created a further impetus for promoting inclusive education (see Chapter 2).

With this agenda as the focus, the Government has given priority to the development of education policy that guarantees equal access to public education in ways that are intended to promote educational success and equal opportunities. In so doing, the state promotes the democratisation of education and the other conditions for education, carried out through schools and other means, necessary to contribute to equal opportunities, the overcoming of economic, social and cultural inequalities, the development of personality and the spirit of tolerance, mutual understanding, solidarity and responsibility, social progress and democratic participation in collective life.

Addressing barriers

In line with current international thinking regarding educational equity and inclusion (UNESCO, 2020[2]), the Portuguese legislation emphasises the responsibility of schools to identify barriers to individual students' learning and develop strategies to overcome them. It also calls for a change in school cultures to encourage more multilevel and multidisciplinary interventions, a demonstrated commitment to inclusive practices and a move away from categorising students.

In Portugal, all educational policy documents make reference to inclusive education and non-discrimination. This reflects principles and norms that seek to guarantee inclusion as a process that aims to respond to the diversity of needs and promote the potential of every student, by increasing participation in the process of learning and within the life of educational communities.

Policies that guarantee equal access to schools, while promoting educational success, have been summarised in a set of guiding principles (Ministry of Education, 2022[3]):

- fostering the improvement of teaching and learning quality
- guaranteeing an inclusive school, which fosters equality and non-discrimination, whose diversity, flexibility, innovation and personalisation respond to student heterogeneity
- valuing the Portuguese language and culture as vehicles for fostering national identity
- valuing foreign languages as vehicles for fostering global and multicultural identity and facilitating access to information and technology
- valuing the community and students' linguistic diversity, as an expression of individual and collective identity
- promoting citizenship and personal, interpersonal, and social intervention development education throughout compulsory schooling.

Meanwhile, any student can benefit from curricular accommodations (see Table 4.1) that aim to facilitate their access to the curriculum and learning activities in the classroom. This is promoted through the diversification and appropriate combination of various teaching methods and strategies, the use of different methods and evaluation tools, the adaptation of educational materials and resources, and the removal of barriers in the organisation of space and equipment, designed to respond to the different learning styles of each student and to promote their educational success.

Table 4.1. Curriculum management measures

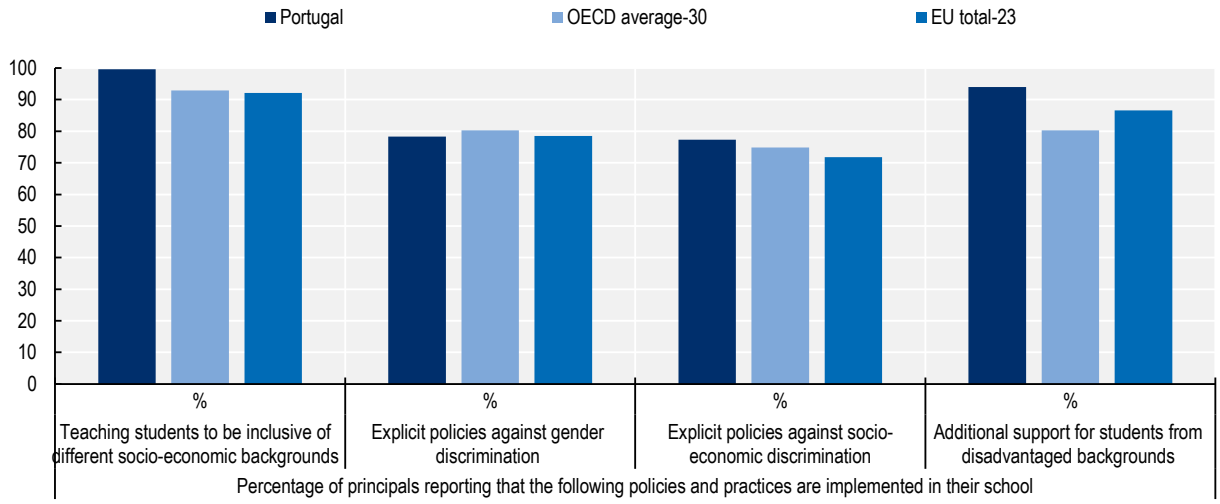
Curriculum management measures	Definition
Curriculum accommodation	Measures that support access to the curriculum and learning activities in the classroom through the diversification and appropriate combination of various teaching methods and strategies, the use of different methods and evaluation tools, the adaptation of educational materials and resources, and the removal of barriers in the organisation of space and equipment, designed to respond to the different learning needs of each student and to promote their educational success.
Non-significant curriculum adjustments	Measures that do not compromise the learning foreseen in the curriculum documents. They may include adaptations with regard to objectives and content by altering their prioritisation or sequencing, or by introducing specific intermediate objectives that allow the achievement of the overall objectives and the essential learnings to develop the competences foreseen in the *Profile Of The Students At The End Of Compulsory Schooling.*
Significant curriculum adjustments	Measures which have an impact on the learning foreseen in the curricular documents, requiring the introduction of other alternative learning objectives, establishing overall goals in terms of the knowledge to be acquired and the competences to be developed, in order to promote autonomy, personal development, and interpersonal relationships.

Source: Ministry of Education (2022[3]), *OECD Review for Inclusive Education: Country Background Report for Portugal*.

Data from the OECD's Teaching and Learning International Survey (TALIS) 2018 indicates that Portugal, according to school principals' perceptions, performed better than the OECD average in many areas related to school practices for equity and diversity in 2018 (OECD, 2019[4]). Figure 4.1 shows that in Portugal almost all of principals surveyed in TALIS 2018 (99.6%) reported that teaching to students in their school was inclusive of different socio-economic backgrounds, compared to lower OECD and European Union (EU) averages (respectively 92.3% and 92.1%). Portugal also had a higher percentage of principals that reported explicit policies against socio-economic discrimination were implemented in their schools compared to OECD and EU averages (77.3% in Portugal against 74.8% on average across OECD countries and 71.8 on average across EU countries). More Portuguese principals (94%) than principals on average across OECD countries (80.3%) and EU countries (86.6%) also reported that additional support for students from disadvantaged backgrounds was provided in their school. Only in terms of the school-level implementation of explicit policies targeting gender discrimination did Portugal score slightly lower than the OECD average, while being in line with the EU average. Specifically, 78.3% principals reported that these policies were implemented in their school, compared to an average of 80.2% across OECD countries and 78.5% across EU countries.

Figure 4.1. School practices related to equity (TALIS 2018)

Percentage of lower secondary principals reporting that the following policies and practices are implemented in their school



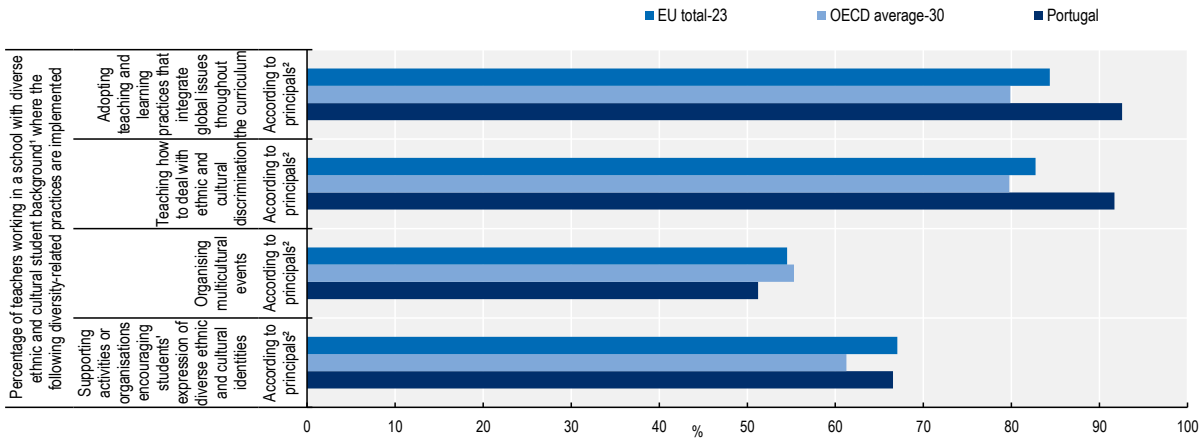
Notes: Values are ranked in descending order of the prevalence of equity-related school practices.
OECD average-30: arithmetic average based on ISCED 2 principal data across 30 OECD countries and economies with adjudicated data. The report refers to the average school or principal "across the OECD" as equivalent shorthand for the average school or principal "across the 30 OECD countries and economies participating in TALIS".
Source: OECD (2019[4]), *TALIS 2018 Results (Volume I): Teachers and School Leaders as Lifelong Learners*, Table I.3.34., https://dx.doi.org/10.1787/1d0bc92a-en .

StatLink https://stat.link/6uanb8

As shown by data from TALIS 2018 (OECD, 2019[4]), Portugal also performed better than OECD countries in some areas related to school-level practices for diversity, as reported by principals included in the survey. Figure 4.2 shows that 92.6% principals reported that their school adopted teaching and learning practices that integrate global issues throughout the curriculum, compared to an OECD average of 79.9% and an EU average of 84.4%. A similar percentage of Portuguese principals (91.7%) also reported that their school taught how to deal with ethnic and cultural discrimination, compared to 79.8% principals on average across OECD countries and 82.7% on average across EU countries. Additionally, in line with the EU average (67%), a higher percentage of principals in Portugal (66.6%) stated that their school supported activities or organisations encouraging students' expression of diverse ethnic and cultural identities compared to the OECD average (61.3%). Only in terms of the organisation of cultural events at school, fewer principals in Portugal reported to do this compared to principals on average across OECD and EU countries (51.2% in Portugal, 55.3% on average across OECD countries and 54.5% across the EU).

Figure 4.2. Percentage of teachers working in a school with diverse ethnic and cultural student background[1] where the following diversity-related practices are implemented

Results based on responses of lower secondary principals



Notes: 1. The sample is restricted to teachers who teach in schools that include students from "more than one cultural or ethnic background" based on both teachers and principals' responses in TALIS 2018.
2. Principals' responses were merged to teacher data and weighted using teacher final weights.
OECD average-30: arithmetic average based on ISCED 2 principal data across 30 OECD countries and economies with adjudicated data. The report refers to the average school or principal "across the OECD" as equivalent shorthand for the average school or principal "across the 30 OECD countries and economies participating in TALIS".
EU total-23: weighted average based on ISCED 2 teacher or principal data across all EU Member States that participate in TALIS with adjudicated data.
Source: OECD (2019[4]), *TALIS 2018 Results (Volume I): Teachers and School Leaders as Lifelong Learners*, Table 1.3.35., https://dx.doi.org/10.1787/1d0bc92a-en.

StatLink https://stat.link/24kbt0

The approach to learning

A pedagogical model is recommended in the Portuguese policy, built around the notion that all students have learning potential that can be harnessed when students receive adequate support. The methodological options underlying this law are based around the universal design for learning model and a multilevel approach to access the curriculum.

As noted previously (see Chapter 2), the tiered multilevel approach encompasses the implementation of three types of measures, identified in the legislation as i) *universal measures*, targeted to all students in order "to promote participation and improved learning" (Decree Law No. 54/2018, Art. 8)[1]; ii) *selective measures*, aimed to fill the need for learning supports not addressed by universal measures; and iii) *additional measures*, set in place "to respond to intense and persistent communication, interaction, cognitive or learning difficulties that require specialised resources of support to learning and inclusion" (Decree Law No. 54/2018, Art. 10).

Importantly, the legislation moves away from a view that it is necessary to categorise to intervene. Rather, it supports the idea that all students can achieve a profile of competences and skills at the end of their compulsory education career, even if they follow different learning paths. Therefore, it views flexible curricular models, systematic monitoring of the effectiveness of the implemented interventions, and an ongoing dialogue between teachers and parents, or other caregivers, as "the educational responses necessary for each student to acquire a common base of competences, valuing their potential and interests" (Decree Law No. 54/2018, Introduction).

Towards inclusive schools

Since 2008, Portugal has had in place laws envisioning the provision of education to all students, without exception, in their local mainstream school in accordance with Article 24 of the United Nations Convention on the Rights of Persons with Disabilities (CRPD). These laws also create explicit obligations requiring the adjustment of the educational process to include all students. This has also led to the establishment of a national network of Information and Communication Technology Resource Centres for Inclusive Education (*Centros de Recursos Tecnologia da Informação e Comunicação para a Educação Inclusiva*, CRTIC) to support general education schools, which assess students' needs for assistive technology.

Consistent with the obligation under the CRPD for countries to transform their domestic education systems progressively and systemically into genuinely inclusive systems, Decree Law No. 3/2008 also initiated a process of reorientation for most of Portugal's special schools, transforming them into Resource Centres for Inclusion (*Centros de Recursos para a Inclusão*, CRIs). These Centres provide specialised support assistance to mainstream schools through partnerships with school clusters. Their roles include facilitating access to education, training, work, leisure, social participation and the promotion of autonomy.

The reform programme has led to a push to develop inclusive schools "where each and every student, regardless of their personal and social situation, finds responses to their potential, expectations, and needs, and develops a level of education that creates full participation, a sense of belonging, and equity, contributing to social inclusion and cohesion" (Decree Law No. 54/2018). However, Alves, Campos Pinto and Pinto (2020[5]) argue that the challenges of implementation, especially a perceived lack of resources and the concern that sharing scarce resources amongst a larger group of students might disadvantage those who are the most vulnerable (e.g. students with complex learning disabilities), have created a challenge for current Portuguese education policy and practice.

Support arrangements

Portuguese schools are expected to create an organisational culture where everyone finds opportunities to learn and the conditions for the full realisation of this right. This is intended to promote the implementation of measures aimed at responding to the needs of each student, valuing diversity, and promoting equity and non-discrimination in accessing the curriculum and navigating throughout the education system.

According to the policy, teachers are expected to use teaching approaches adapted to students, mobilising the necessary measures to support their participation and learning. Commenting on this, the OECD report "Adapting Curriculum to Bridge Equity Gaps" (2021[6]) notes that teachers in Portugal make the necessary adaptations to the curriculum for students with specific needs within the framework set by the law on inclusive education. Moreover, inclusion has gained a wider reach through a process that aims to respond to the diversity of the needs and potential of each student, by increasing their participation in the processes of learning and educational community life.

Support to students with an immigrant background

In line with the guiding principles of the educational policy, specific measures have been implemented to ensure access and to improve the educational success of newly arrived immigrants and, more recently, of refugees, in primary and secondary education.

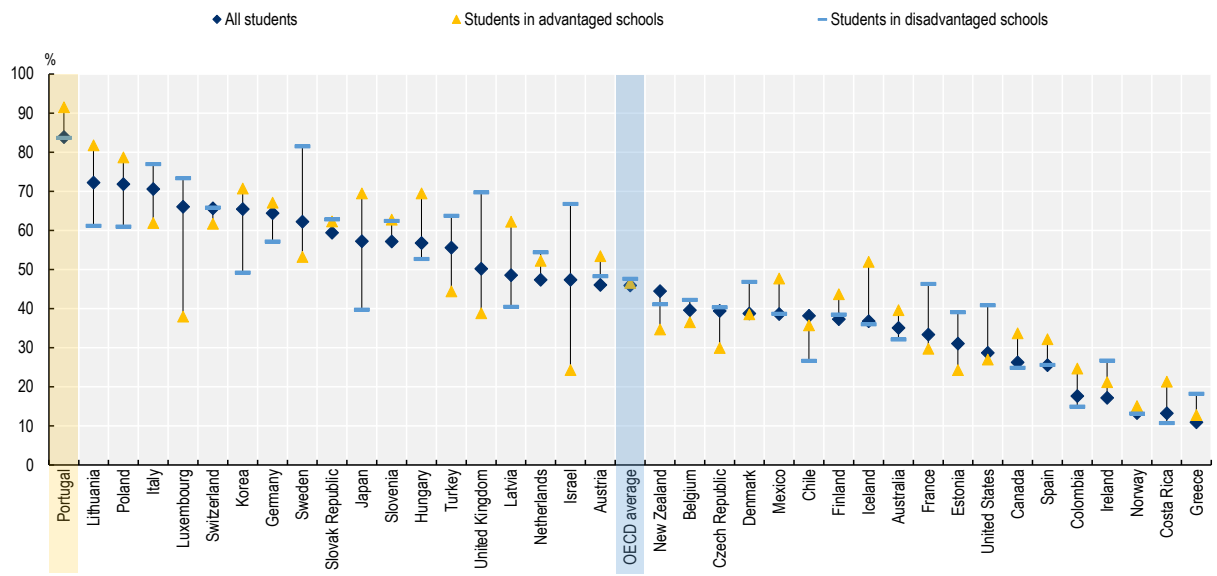
In order to improve the educational success of students with an immigrant background recently arrived in the Portuguese educational system, the Ministry of Education (MoE) is implementing educational policies of support regarding the acquisition of the Portuguese language. The latter is both a school subject and the language of schooling (see Chapter 2). These students are offered the school subject Portuguese as a second language in primary and secondary education. The objective is to guarantee to all students that

are non-native Portuguese speakers equal conditions to access the school curriculum and achieve educational success, regardless of their mother language, culture, socio-economic background, origin and age. These arrangements are offered in primary and lower secondary education in most education and training courses, including scientific-humanistic courses and specialised artistic courses in upper secondary education, as well as in professional courses with dual certification at the secondary level.

With respect to the acquisition of test-language skills for students after school hours, OECD's Programme for International Student Assessment (PISA) 2018 suggests that Portuguese schools provided more support than the average OECD country (Figure 4.3). In particular, in Portugal, the percentage of students included in PISA 2018 attending schools where additional test-language lessons were offered to all students was 84% compared to an OECD average of 46% students. However, there were variations between Portuguese schools when taking into account advantaged and disadvantaged school settings. In Portugal, 91% of students in advantaged schools reported attending schools where there was a provision of after-school test-language lessons, compared to an average of 48% across OECD countries. When considering students in disadvantaged schools, the percentage of students narrowed to 84%, still significantly above 47%, which was the average across OECD countries (OECD, 2020[7]).

Figure 4.3. Participation in additional language-of-instruction lessons after regular school hours, by schools' socio-economic profile

Based on students' reports



Notes: A socio-economically disadvantaged (advantaged) school is a school whose socio-economic profile (i.e. the average socio-economic status of the students in the school) is in the bottom (top) quarter of the PISA index of economic, social and cultural status amongst all schools in the relevant country/economy.
Countries and economies are ranked in ascending order of the percentage of students in schools that provide additional language-of-instruction lessons after regular school hours.
Source: Adapted from OECD (2020[7]), *PISA 2018 Results (Volume V): Effective Policies, Successful Schools*, Figure V.6.6, https://doi.org/10.1787/ca768d40-en.

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Within the scope of the Decree Law No. 54/2018, other specific educational measures can be applied by each school to support students with an immigrant background, in order to ensure their successful school

inclusion in the national curriculum. In force since 2015/2016, the Learners with refugee status and asylum seekers programme aims to welcome and include students with an immigrant background into Portuguese schools by supporting progressive access to the national curriculum and fostering their educational success. The programme reinforces support for Portuguese language learning as a subject of study and language of schooling and provides specific educational measures. These include facilitating the process of academic degree recognition, progressive integration in the curriculum, reinforcement of Portuguese language learning and School Social Assistance (*Ação Social Escolar*, ASE).

Resource Centres for Inclusion (CRIs) and Resource Centres for ICT (CRTIC)

While students seen as having additional learning needs are expected to attend mainstream schools and learn in the same classroom as other students, specific curriculum adjustments are available to ensure their access to the curriculum. To ensure adequate support for these students, specialised support staff might be available, often provided by the CRIs supporting the school. One of the fundamental pillars of the strategy for the inclusion of students with additional needs in public schools is the specialised professional support of the CRIs. In 2021, there were 102 CRIs accredited by the MoE distributed across the country.[2] After an accreditation process by the MoE for this purpose, the CRIs have established a yearly contract of specialised services, with the following key intervention areas:

- specialised support units for the education of students with multiple disabilities and congenital deaf blindness
- support for the specialised evaluation of children and young people with special education needs
- support for the implementation of curricular enrichment activities (specific programmes, adapted sport practice, etc.)
- support in the development, implementation and monitoring of Individual Education Programmes.

Students who are deaf and attend reference schools for bilingual education (mainstream schools with additional provisions) use Portuguese Sign Language (PSL) as their first language and written Portuguese language as their second language. This constitutes a specific curriculum adjustment for Portuguese as Second Language. Students are also entitled to teachers with specialised training in deafness, PSL teachers, PSL interpreters and speech therapists. Those reference schools have specific equipment and materials that guarantee access to information and the curriculum, namely, equipment and materials for visual support learning.

Some students can also be entitled to *specific curricular areas*, including vision training, using the Braille system, guidance and mobility, specific information and communication technologies and activities of daily life. Assistive technical support tools are made available to enable participation in the teaching and learning process. The Information and Communication Technical Resource Centres assess and prescribe the technical support required.

The MoE's Resource Centre produces schoolbooks in Braille, large font and Digital Accessible Information System (DAISY) formats. The Resource Centre for Information and Communication Technology for Special Education (CRTICs in Portuguese)[3] also produce adapted material and train teachers to use specialised software for different special education needs. The MoE, together with health and social security services, also provides support in early childhood intervention for the referral of students with special education needs and to support pre-school education and school development.

Schools' multidisciplinary team to support inclusion

Decree Law No. 54/2018 requires that each school cluster and individual school has a multidisciplinary team to support inclusion (*Equipa Multidisciplinar de Apoio à Educação Inclusiva,* EMAEI). The EMAEI includes permanent and variable members. The permanent members of the EMAEI are an assistant of the school director, one special education teacher, three members of the pedagogical council and the

school psychologist. The variable members of the EMAEI are chosen in relation to the student that is being taken care of, including parents. In addition, there may be the involvement of the multidisciplinary team coordinator, the coordinator of the school and/or a mainstream teacher of the student. Parents and students are also part of these teams that are responsible for:

- raising awareness of inclusive education in their educational community
- proposing learning support measures to be mobilised
- following up and monitoring the implementation of learning support measures
- advising teachers about the implementation of inclusive pedagogical practices
- preparing technical-pedagogical reports, individual educational programmes and transition plans
- following up on the functioning of the learning support centres.

These teams are in charge of identifying, supporting and following up on students who face difficulties and need extra support. They are also responsible for developing a student's Individual Educational Plan (*Programa Educativo Individual,* PEI) and Individual Transition Plan (*Plano Individual de Transição*, PIT).

For the students who need significant curricular adaptations, an Individual Educational Programme (PEI) can be designed. A PEI includes the identification of and an implementation strategy for the significant curricular adaptations and integrates the competences and learning to be developed by the student, as well as the identification of the teaching strategies and the adjustments to be made in his/her evaluation process. A PEI also includes other measures to support inclusion, to be defined by the multidisciplinary team. A PEI must include the total amount of school time, according to the respective level of education; the assistive products/devices, when appropriate and necessary for access and participation in the curriculum; and the strategies for transition between cycles and levels of education, when applicable. It is the responsibility of the EMAEI to prepare the PEI as well as the technical-pedagogical report and the individual transition plan and to follow-up, to monitor and to assess the implementation of the learning support measures.

Three years before students with the additional measure of significant curricular adaptation reach the age limit for exiting compulsory education, the school should complement their PEI with a PIT. The EMAEI must prepare the PIT in collaboration with all stakeholders in the student's educational process, and with families. The PIT must be prepared based on the evidence collected, within the scope of the support, throughout the student's educational process. The elaboration of a PIT must be based on the student's interests, on the development of realistic perceptions and on the mapping of local resources, for which there is a need for the support of the CRI working with the school. The first phase of the PIT is to discover the learner's wishes, interests, aspirations and competencies. This phase includes an assessment of the labour market needs in the learner's community and a search for training opportunities or real work experience based on the learner's interests and her/his capacity to take part in a professional activity. Once training or internship opportunities available in the community are clarified, the PIT identifies the competencies (academic, personal and social), adjustments and special equipment required. After this assessment, agreements are established with the services and institutions where the learner will be trained or intern. These define the tasks the student will do, the competencies required and the support needed to achieve these tasks.

Impacts

An OECD review, "Curriculum Flexibility and Autonomy in Portugal" (OECD, 2018[8]), concludes that Portugal has taken a sound strategic approach in relation to the education reforms. It notes that the process began by envisioning the outcomes the education system should seek for its students, based on evidence about 21st century conditions. These outcomes are expressed in a coherent strategic plan, described in detail in the reference document Students' Profile by the End of Compulsory Schooling.

The review also reports that the country has achieved widespread agreement on its reform plans through careful consultation, debate and communications that have been well handled and successful. By seeking expert advice, shareholder input, and open communication and debate, the country has also invested in the continuance of the reform plan by future governments.

A review of school resources in Portugal (Liebowitz et al., 2018[9]) argues that the school system has witnessed historic improvements in access, attainment and performance over the past 20 years. It notes that Portugal is fast approaching near universal enrolment for school-aged children since the extension of compulsory schooling to 18 in 2009. Enrolment rates of students between 3 and 5-years-old in pre-primary education increased to 88% in 2014, with a goal of universal access set for 2019.

Between 2005 and 2015, the proportion of youth under 25 years old who graduated from secondary schooling jumped from half to four-fifths of young people, by far the largest increase among OECD countries. Furthermore, in Portugal, 15-year-old students saw the greatest improvements in their science abilities of any other OECD country, as measured by the OECD PISA between 2006 and 2015. Simultaneously, the proportion of 15-year-old students scoring below baseline proficiency declined precipitously. These improvements in students' scientific skills were accompanied by similar substantial improvements in 15-year-olds' reading and mathematics skills. Likewise, Portuguese students in their fourth year of primary school have improved their mathematics skills significantly over the past 20 years, as evidenced by the Trends in International Mathematics and Science Study (TIMMS) (Liebowitz et al., 2018[9]).

Despite these impressive accomplishments, Portugal still faces significant challenges to achieve an excellent and equitable system of schools. In particular, important differences in student outcomes persist for students from under-served backgrounds, such as those from low-income families, those with low levels of parental education and immigrant students, as discussed in Chapter 1.

Strengths

In planning the next stage of development with regard to equity and inclusion in its schools, Portugal has many strengths that can be built upon. The following are particularly relevant to the promotion of equity and inclusion at the level of schools.

The widespread awareness and acceptance of national educational policies focused on the promotion of equity and inclusion provide a sound basis for developments in schools

Clarity of purpose

The review team met with a range of stakeholders across the different levels of the education system to consider progress in relation to the wide-ranging reforms that have been introduced in response to equity and inclusion principles. These stakeholders included policy makers, practitioners, young people, researchers and a variety of community representatives. A striking feature of these discussions was the widespread awareness and acceptance of the principles upon which the national education policies are based. Particularly impressive was the way that children and young people talked about their pride at being students in a school that is inclusive. Some also talked of the value they gained from being involved with such a diverse range of classmates. At the same time, there is a high level of awareness of the dangers associated with using labels in referring to potentially vulnerable groups of students. Frequent mention was also made to the political history of the country that has influenced the concern for seeing education as a basis for fostering democracy.

All of this can be contrasted with the situation in many other countries, where equity and inclusion are still matters of considerable confusion and debate. This can be seen, for example, in a series of articles in a recent special edition of the United Nation Educational, Scientific and Cultural Organisation (UNESCO) journal Prospects on the theme "Inclusive education: New developments, new challenges" (*Volume* 49, 3/4, November 2020)[4] that probe deeply into the developments and challenges that the authors have found as they analysed particular contexts around the world. For example, Khochen-Bagshaw (2020[10]) writes about progress across the Middle East and North Africa; Sharma examines developments in the Pacific region; and Calderón-Almendros and colleagues (2020[11]) analyse challenges and opportunities in Latin America. Each of these papers shed light on patterns that are evident across countries that share cultural, religious and linguistic similarities. At the same time, they also warn that this should not distract us from looking more closely at what happens within countries, since, as far as educational development is concerned, 'context matters' (Fullan, 2007[12]).

Other articles in the special edition of Prospects examine how political history has influenced progress in relation to equity and inclusion, a factor that significantly contributes to understanding developments in Portugal. This is particularly evident in Engelbrecht's analysis of developments in South Africa, which, she explains, have to be understood in relation to broader political, social and cultural developments since the end of Apartheid (Engelbrecht, 2020[13]). In their account of developments in Australia, Boyle and Anderson (2020[14]) argue that current reform agendas situate inclusive education against, rather than alongside, other prevailing policies. And in their analysis of current developments in the Canadian province of Nova Scotia, Whitley and Hollweck (2020[15]) explain how, as in Portugal, the inclusion agenda has broadened to focus on all students, particularly those most often marginalised by and within the school system.

Some of the papers focus on the role of policy within contexts that are seen as being in the vanguard of progress in relation to equity and inclusion. For example, the province of New Brunswick in Canada is frequently quoted as an example of a system that has pioneered the concept of inclusive education through legislation, local authority policies and professional guidelines. In their account of these developments, AuCoin and her colleagues (2020[16]) explain that change has been a difficult process that has involved developments over many years. Writing about Italy, another country recognised for its progress in relation to inclusive education, Ianes and his colleagues (2020[17]) explain how, in 1977, the Italian government passed a law that closed all special schools, units, and other non-inclusive education provisions. While thinking and practice varies from place to place within Italy, the principle of inclusion is widely accepted, although, as in Portugal, challenges remain in respect to the development of inclusive practices within schools. This is a reminder that this kind of far reaching educational reform requires consistent efforts over many years.

Many of the difficulties with reform efforts reported in the Prospects journal on the theme of "Inclusive education: New developments, new challenges"[5] had their origins in a lack of shared understanding as to the intended outcomes of a reform process. Given that change requires coordinated efforts across the different levels of an education system, an agreed and clear purpose is an essential condition. Reaching the required degree of clarity is both a cultural and political process in which certain voices might be excluded, while others over privileged, and in which underpinning assumptions need to be challenged.

In relation to these varied international situations, the progress made in Portugal regarding clarity of purpose represents an important achievement, as explained by Alves and her colleagues in their Prospects article. International research literature on educational change points to clarity of purpose as a crucial factor in ensuring that reforms are implemented in relation to school organisation, teacher attitudes and classroom practices (Ainscow, Chapman and Hadfield, 2020[18]; Hargreaves et al., 2010[19]).

Almost all students are placed in mainstream schools, which have significant resources for supporting their involvement

Current arrangements

As noted above, the national legislation places Portugal at the forefront of global efforts to promote equitable and inclusive educational arrangements. As a result of a reform process over the last three decades, it means that, nowadays, relatively few students are educated in separate school settings. Also, from a comparative cross-country perspective, class sizes are relatively small. For example, in public lower secondary institutions, there are 22 students per class in Portugal, compared to 23 students per class on average across OECD countries (OECD, 2020[20]). Furthermore, these may be reduced to 20 students in pre-primary, first, second and third cycle classes, as well as in vocational classes, when they include students seen as needing additional measures to support their learning. There remains, however, a small number of special schools, serving 1 % of students (see Chapter 1).

In addition, there are well-established arrangements for integrating newly arrived immigrant students. In particular, newly arrived students are provided with additional classes of Portuguese as a second language to facilitate their integration in mainstream classes. In line with the guiding principles of the educational policy, specific measures have also been implemented to ensure access and improve the educational success of newly arrived immigrant children and youths and, more recently, of refugees, in primary and secondary education.

Despite these impressive accomplishments, as noted in Chapter 1, differences in student outcomes persist for students from lower socio-economic backgrounds, families with low levels of parental education, immigrant students and other vulnerable groups. It is also worth noting that Portugal has a significant proportion of its students in fee-paying schools.

Providing support

It is intended that, as far as possible, measures to support the learning and inclusion of particular students should be implemented in the context of the mainstream classroom, even when the intervention requires the presence of a support teacher. However, it is still possible for some students to be sometimes taken out of the classroom in order to receive support.

As noted earlier in this chapter, the legislation requires that each school should have a multidisciplinary team to promote inclusive education for particular students, with both permanent and variable members. Once the need for measures to support the learning and inclusion of a student has been identified, the school director requests the multidisciplinary team to prepare an individual technical-pedagogical report. This report substantiates the mobilisation of selective or additional support measures for learning.

The multidisciplinary teams are required to adopt a holistic view, considering the academic, behavioural, social and emotional aspects of the student, as well as environmental factors, particularly linked to the school and classroom settings. They are also expected to collect evidence that make clear information available to match the teaching and learning process to each student's levels of achievement. The review team considers these teams to be fundamental school-level actors. In spite of some current weaknesses (see also Chapter 3), they have a considerable potential to deal with diversity and promote equity and inclusion in schools. Later in this chapter recommendations are made as to how these arrangements might be further developed in order to support the promotion of inclusive classroom practices.

The cluster system offers potential to coordinate school-to-school support for efforts to promote the development of inclusive practices

Local collaboration

The well-established pattern of schools working in clusters is a particular strength in relation to the promotion of inclusive practices and forms of organisation that support the introduction of these ways of working. Many other countries are seeking to establish similar arrangements, building on research suggesting that collaboration between schools has an enormous potential for fostering their capacity to respond to student diversity (Bryk, Gomez and Grunow, 2011[21]; Muijs et al., 2011[22]; Fielding et al., 2005[23]). More specifically, research shows how such partnerships can help to reduce the polarisation of schools, to the particular benefit of those students who are marginalised at the edges of the education system, and whose progress and attitudes to schooling cause concern (*Ibid*.).

There is also evidence that when groups of schools seek to develop more collaborative ways of working, this can have an impact on how teachers perceive themselves and their work (Little and McLaughlin, 1993[24]; Day et al., 2007[25]). Specifically, exposure to practices in different schools can lead teachers to view underachieving students in a new light (Ainscow et al., 2012[26]). In this way, students who cannot easily be educated within a school's established routines are less likely to be seen as 'having problems' but as challenging teachers to re-examine their practices to make them more responsive and flexible. Later in this chapter recommendations are made as to how further networking between clusters might be encouraged.

A further area of potential strength is the active involvement of community representatives in policy formulation within school clusters, including the appointment of school directors. These arrangements provide a sound basis for engaging community partners in collaboration to support the promotion of equity and inclusion within a cluster.

Social capital

The idea of schools cooperating underlines the potential importance of the Portuguese school clusters, which the review team sees as a major strength. From discussions with many stakeholders, the team came to the conclusion that these organisational structures can have an important role in the promotion of equity and inclusion within schools in their local areas. A helpful theoretical interpretation that can be made of the potential of this role is that they can help to strengthen social capital (Putnam, 2000[27]). In other words, they can be used to create pathways through which expertise and lessons from innovations can be spread across local education systems.

Social capital exists when there is trust between a school and its various stakeholders (Hargreaves, 2012[28]). It is about the extent and quality of the networks among its members – between directors and staff, staff and students, teachers and parents – as well as the school's links with external partners. A school that is rich in social capital has a strong sense of itself as a community, with ties to other communities; it also understands the importance of knowledge-sharing (Hargreaves, 2010[29]). As a result, the best professional practices are not trapped within the classrooms of a few outstanding teachers but are the common property of all who might benefit from them.

Writing about the United States, Putnam (2000[27]) states that "what many high-achieving school districts have in abundance is social capital, which is educationally more important than financial capital" (p. 306[27]). He also suggests that this can help to mitigate the insidious effects of socio-economic disadvantage. Reflecting on his work with schools serving disadvantaged communities in the United States, Payne (2008[30]) comes to a similar conclusion. Thinking specifically about school contexts that are characterised by low levels of social capital, he argues:

> *"Weak social infrastructure means that conservatives are right when they say that financial resources are likely to mean little in such environments. It means that expertise inside the building is likely to be underutilized, and expertise coming from outside is likely to be rejected on its face. It means that well-thought-out programmes can be undermined by the factionalised character of teacher life or by strong norms that militate against teacher collaboration" (p. 39[30]).*

Mulford (2007[31]) suggests that by treating social relationships as a form of capital they can be seen as a resource, which can then be drawn on to achieve organisational goals. There are, he explains, three types of social capital, each of which throws further light on the processes that could be developed within an education system:

- *bonding social capital*, which relates to what can happen amongst work colleagues within a school
- *bridging social capital*, which refers to what can occur between schools through various forms of networking and collaboration
- *linking social capital*, which relates to the relationships between a school and wider community resources.

The evidence generated through this review of the Portuguese education system suggests that a major factor in determining success in promoting equity and inclusion in classrooms will be an ability to strengthen social capital within schools, between schools, and between schools and their communities. As explained later in this chapter, the task of those involved in leadership roles is, therefore, to create the climate that will support such developments. The school clusters in Portugal are important vehicles for making this happen. Stronger links between clusters within a local district will help to extend these arrangements. However, as argued later in this chapter, this will need effective and sensitive coordination amongst stakeholders at the local level.

Challenges

In building on these strengths, during the next phase of policy development Portugal will need to address a series of challenges related to the implementation of policies for promoting equity and inclusion at the level of schools. Most importantly, these include the following:

There is unequal implementation of the inclusive education policy framework at the school and local levels

Variations

During virtual meetings with stakeholders and school visits, the OECD review team gained a strong impression that there are considerable variations between schools, school clusters and localities across the country in regard to the ways in which the principles of equity and inclusion are being implemented. This suggests that local factors are influencing the ways in which the policy is being interpreted and acted upon.

This can be anticipated given the findings of international research which argues that reforms require understanding of the aims and purposes at all levels of an education systems (Fullan, 2007[12]), not least at the classroom level, where, as far as their students are concerned, teachers themselves are policy makers (Ball, 2010[32]). It is also important to remember that the promotion of equity and inclusion in education is not simply a technical or organisational change – it is a movement in a clear philosophical direction (UNESCO, 2017[33]). Therefore, moving to more inclusive ways of working requires changes in thinking and practices across all levels of the education system. These changes span from shifts in policy-makers' values and ways of thinking, which enable them to provide a vision shaping a culture of inclusion, to significant changes within schools, classrooms and communities.

The establishment of a culture of inclusion in education therefore requires a shared set of assumptions and beliefs amongst policy makers and senior staff at the national, district and school level that value differences, believe in collaboration and are committed to offering educational opportunities to all students (Ainscow, 2016[34]). However, changing the cultural norms that exist within an education system is difficult to achieve, particularly within a context that is faced with many competing pressures and where practitioners tend to work alone in addressing the problems they face (Ainscow, Chapman and Hadfield, 2020[18]).

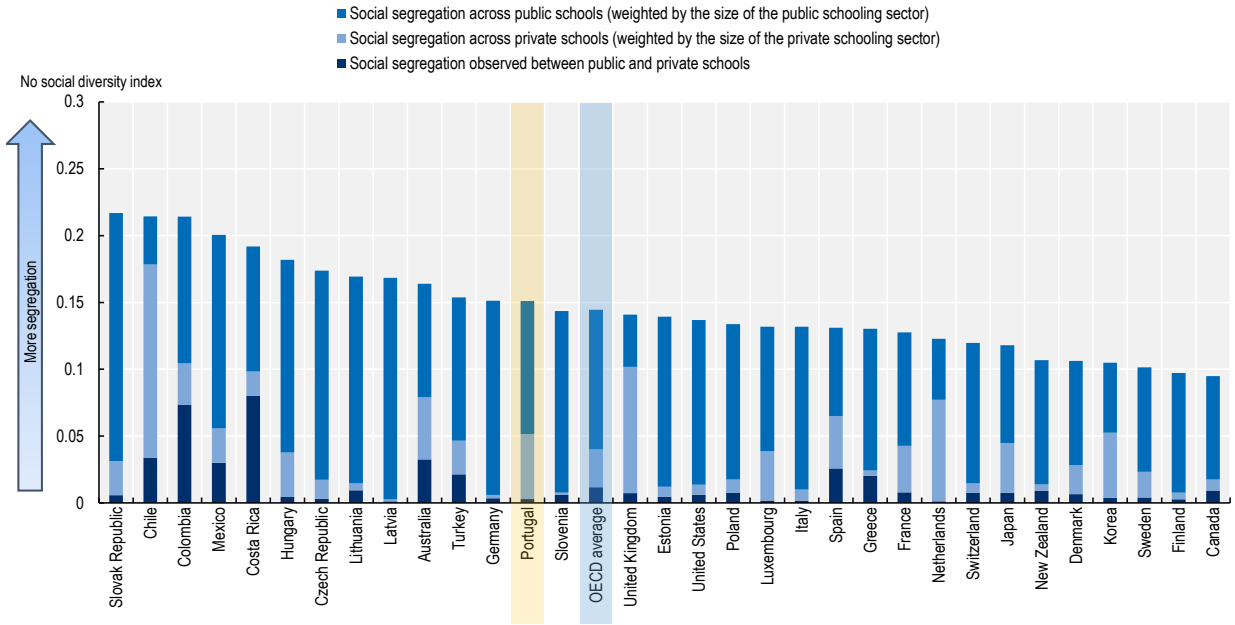
This points to the importance of the contributions of those in management roles, at both the school and municipal levels. Again, evidence collected by the review team suggests that there is considerable variation within Portugal in relation to the effectiveness of leadership practices across the country. At the same time, the review team had the opportunity to meet some senior staff in schools, particular school leaders, who seem to be providing dynamic leadership, despite feeling somewhat isolated from opportunities to learn from and with colleagues involved in similar work in other clusters.

Student diversity and segregation

Evidence from PISA 2018 suggests that there are variations in the student composition and social segregation across education settings in Portugal. In particular, PISA measures student diversity and social segregation through the no social diversity index, which assesses whether the diversity of students within schools reflects the diversity of students at the country-level. The index ranges from 0, no segregation, to 1, full segregation. Figure 4.4 shows that Portugal scores slightly higher than the OECD average in terms of social segregation, with a no social diversity index equal to 0.15 in Portugal and 0.14 on average across OECD countries. When weighting social segregation by the size of public and private sectors, the variation across public schools was higher than across private sectors, with a no social diversity index equal to 0.10 and 0.05 respectively (OECD, 2019[35]).

Figure 4.4. Public and private schools, and social segregation across schools (PISA 2018)

Decomposition of the no social diversity index based on the contributions of public and private schools



Note: The no social diversity index measures whether the diversity of students observed within schools reflects the diversity of students observed at the country/economy level. The index ranges from 0 to 1, with 0 corresponding to no segregation and 1 to full segregation. Countries and economies are ranked in descending order of the overall level of segregation.
Source: Adapted from OECD (2019[35]), *PISA 2018 Results (Volume II): Where All Students Can Succeed*, Figure II.4.7, https://doi.org/10.1787/b5fd1b8f-en.

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Meanwhile, a combination of factors - including lack of school choice and housing policies - has led to the creation of some Portuguese schools with particularly high concentrations of students from socio-economically disadvantaged backgrounds (OECD, 2018[8]). Similarly, students with an immigrant background and from Roma communities tend to be located in schools in particular municipalities/parishes. The review team also heard accounts of the many challenges facing these schools, including difficulties they experience in appointing and retaining suitably qualified teachers.

These difficulties reflect similar challenges experienced in a number of countries across the world, which suggest that market approaches to education improvement can create barriers to achieving educational equity and social justice. However, there is very little school choice in Portugal, since most students usually attend state schools which are close to their place of residence.

In relation to this issue, the review team heard views suggesting that one of the most important challenges faced by the Portuguese education system is that of including students from Roma communities, as noted earlier in this report (see Chapter 1). Moreover, evidence provided by national and international studies invariably suggests that the inclusion of Roma students is a significant concern in most European countries, including Portugal (Rutigliano, 2020[36]). This seems to be related, in part, to prejudices and stereotypes that still exist within Portuguese society. There is also said to be a continued lack of awareness and mistrust between Roma and non-Roma people, which, from time to time, creates tensions and misunderstandings between students, teachers and families (Araújo and Brito, 2018[37]).

These patterns are further compounded by variations in the provision of additional resources to support efforts to implement equitable and inclusive arrangements. Here, the Priority Intervention Education Territories (*Territórios Educativos de Intervenção Prioritária*, TEIP), referred to in Chapter 2, is a significant initiative. Currently, TEIPs involve 137 school clusters located in districts with high levels of poverty and social exclusion (about 17% of the total). Schools in these areas have additional resources to support the implementation of three-year improvement plans that are focused on four priorities:

- improvements in teaching and learning
- prevention of early school leaving, absenteeism and indiscipline
- school management and organisation
- relationships between school, families and communities.

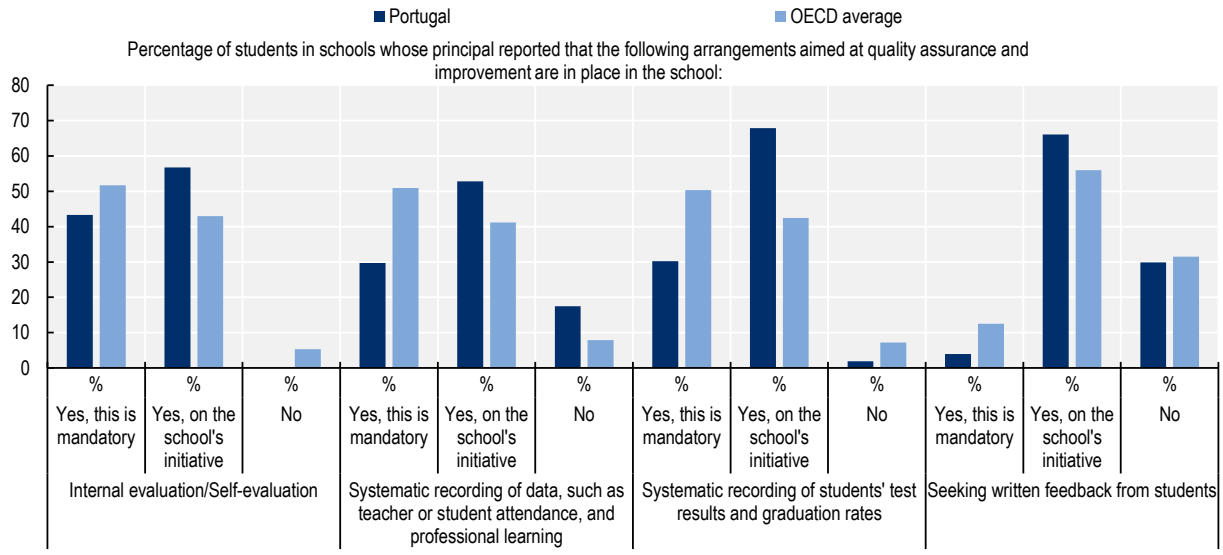
Clearly, there are lessons from these experiences that could be used to inform wider improvement initiatives across Portugal. At present, however, it is unclear how the sharing of expertise can be facilitated, which points to the importance of local monitoring and coordination, an area discussed later in the chapter.

Local monitoring

Related to this concern about the need for better local monitoring and coordination, the review team also heard reports indicating that there are ineffective strategies in place for monitoring schools to identify and intervene in the contexts that are a cause for concern. This is supported by evidence from PISA 2018 which shows that Portugal had a lower percentage of students whose principals reported their schools had mandatory quality assurance and improvement functions than the OECD average. However, when looking at school-level initiatives to promote these functions, the percentage of students whose principals stated to have such initiatives was higher than on average across OECD countries (OECD, 2020[7]). These functions include internal evaluation/self-evaluation, systematic data recording (e.g. on student outcomes, teacher or student attendance, professional learning), systematic recording of students' test results and graduation rates and seeking written feedback from students (see Figure 4.5).

Figure 4.5. Quality assurance and improvement actions at school (PISA 2018)

Results based on principals' reports



Source: OECD (2020[7]), *PISA 2018 Results (Volume V): Effective Policies, Successful Schools*, Table V.B1.8.11., https://doi.org/10.1787/ca768d40-en.

StatLink https://stat.link/sti1vy

Learning and teaching strategies that do not reflect the new paradigm

School-level implementation

Like all major policy changes, progress in relation to equity and inclusion requires an effective strategy for implementation. In particular, it requires new thinking that focuses on the barriers experienced by some children and young people that lead them to become marginalised as a result of contextual factors, such as inappropriate curricula and forms of assessment, and inadequate teacher preparation and support (Ainscow, 2020[38]). The implication is that overcoming such barriers is the most important means of developing forms of education that are effective for all students. In this way, the focus on equity and inclusion has the potential to become a way of achieving the overall improvement of education systems (OECD, 2012[39]).

There is not one single model of what an inclusive school looks like. What is common to highly inclusive schools, however, is that they are welcoming and supportive places for all of their students, not least for those with special education needs and others who experience difficulties (Dyson, Howes and Roberts, 2004[40]). This does not prevent these schools from also being committed to improving the achievements of all of their students. However, this requires organisational flexibility and the active support of senior staff, prepared to encourage and support processes of experimentation (Riehl, 2000[41]).

Within the new policy framework, Portuguese schools have increased autonomy. Indeed, flexibility and autonomy are seen as key concepts in the design and implementation of curricula and educational activities (see Chapter 2). The overall impression of practice gained by the review team is a degree of variation in the ways in which schools carry out their work, albeit within a system that is still relatively centralised, and where examinations and university entrance requirements are influential, particularly as

students get older. As reported by the OECD (2018[8]), this leaves Portuguese school leaders facing a dilemma when designing the curriculum: “teaching for the national exam versus promoting active learning, formative assessment and other pedagogies” (p. 33[8]).

Classroom practices

The impression gained by the review team is that classroom practices vary considerably, within and between schools. For example, some examples were noted of teachers using the sorts of collaborative learning approaches that are known to encourage greater participation amongst students. Meanwhile, some teaching involves a step-by-step pattern, following workbooks, usually chosen at the cluster level. The concern is that this approach may restrict the discretion of teachers to vary their practices in response to student diversity. There is also a worry expressed by some respondents that these books may not show sufficient sensitivity to the diversity that exists within the community. In some schools, it was noted that limited use is made of displays of student work, on classroom walls and around corridors. Again, such arrangements can help to create a climate where students feel valued for their contributions.

In thinking how best to promote inclusive practices it is important to recognise that teaching is a complex and often unpredictable endeavour that requires a degree of improvisation (Huberman, 1993[42]). Indeed, a significant hallmark of an inclusive school is the degree to which the teachers are prepared to adjust their practices in the light of the responses of members of their classes. Consequently, teachers must have sufficient autonomy to make instant decisions that take account of the individuality of their students and the uniqueness of every encounter that occurs (Wiliam et al., 2004[43]). Therefore, what is needed is a well-coordinated, cooperative style of working that gives individual teachers the confidence to improvise in a search for the most appropriate responses to all the students in their classes (Ainscow et al., 2006[44]).

Opportunities for professional learning must therefore be an essential element of the strategy for implementing the new thinking through the introduction of inclusive classroom practices and organisational conditions that support teachers in developing such ways of working. As noted in Chapter 3, within Portugal there exists a well-established pattern of in-service teacher training courses. The concern of the review team, however, is that, for some teachers at least, this seems to be a means of recording their career progression and that it could become an exercise in ”box ticking” of activities completed, rather than as a stimulus for innovations regarding hard-to-reach students.

School-based professional learning

Evidence from international research suggests that professional learning activities are likely to be more powerful if they are situated within schools in ways that build on existing practice (Avalos, 2011[45]; Cordingley et al., 2005[46]; Earley and Porritt, 2014[47]). This can also encourage ”joint practice development”, which Fielding and colleagues (2005[23]) define as learning new ways of working through mutual engagement that opens up and shares practices with others. They suggest that joint practice development involves interaction and mutual development related to practice; recognises that each partner in the interaction has something to offer; and is research-informed, often involving processes of collaborative inquiry.

Through such collaborative activities within schools, teachers develop ways of talking to one another that enable them to articulate details about their practices. In this way, they are able to share ideas about their ways of working with colleagues. This also assists individuals to reflect on their own ways of working, as well as the thinking behind their actions (Brussino, 2021[48]). Again, the school clusters could provide a context for these activities, using the existing training centres to coordinate them. However, the review team found little evidence of this form of school-based professional learning being undertaken as part of school development strategies. These topics are developed later in this chapter.

In spite of organisational strengths, such as the school clusters, there is limited collaboration across the education system

The importance of collaboration

The Portuguese reforms require changes in organisational arrangements and practices that will lead them to respond positively to student diversity – seeing individual differences not as problems to be fixed but as opportunities for enriching learning. Within such a conceptualisation, a consideration of difficulties experienced by students can provide an agenda for improvement and insights as to how changes might be brought about. However, this kind of approach requires an emphasis on collaboration that encourages and supports collective problem solving (Skrtic, 1991[49]; Robinson, 1998[50]).

During the visits, the review team heard many positive examples of informal and structured collaboration amongst schools and within clusters that can be built upon. However, some of those spoken to suggested that, overall, collaboration is not a strength of the education system. And, during the visits no examples were found of school-based collaborative professional development activities being organised.

This relative weakness was referred to in regards to different levels of the system: amongst school staff, within school clusters and between municipalities. Mention was also made of school staff lacking the time to create and participate in collaborative activities, which points to the importance of strategic leadership in making this happen.

This reflects the analysis presented in the TALIS 2018 report which states that only 5% of Portuguese teachers report participating in collaborative professional learning at least once a month (OECD average 21%) and 23% engage in team teaching with the same frequency (OECD average 28%) (OECD, 2019[4]). Relevant to the recommendations made later in this chapter, these impressions are supported by a recent study in Portugal (Silva, Amante and Morgado, 2017[51]), which concludes that schools with a positive school climate are more likely to have teachers who diversify their teaching strategies and collaborate with colleagues resulting in stronger academic performance in students.

It is important to stress, too, that the need for greater collaboration must stretch beyond schools. The review team met representatives of many voluntary organisations, including some who work with families, young people and minority communities, who could more actively contribute to the promotion of equity and inclusion in schools. All these stakeholders mentioned the work they are doing in their localities. At the same time, many of them expressed frustration that their voices were too often ignored, and that the work they do is not fully recognised and acted upon.

Additional resources that are intended to support the promotion of inclusion seem to be mainly focused on strategies that encourage separate arrangements for some students

The roles of specialist support staff

As noted above, the move towards equity and inclusion in education represents a paradigm shift in relation to how student diversity is addressed within Portuguese schools. Therefore, despite the impressive progress that has been made, it is unsurprising that this change is taking time to implement given that the key change agents – classroom teachers and support staff – are busy carrying out their duties. Hence, this highlights the importance of an investment in professional learning for all staff.

This has particular implications for the specialised support staff that are there to ensure the presence, participation and achievement of more vulnerable students. Over recent years, these staff members have seen their roles change to promote more inclusive arrangements. However, the impression gained by the

review team, through interviews and school visits, is that these organisational arrangements have not been matched by changes in the thinking and practices of many of the staff involved.

Alves and her colleagues (2020[5]) explain that specialised support in Portuguese mainstream schools is usually provided by special education support teachers, professionals linked to local CRIs, or specialised professionals hired directly by the schools. Specialised support staff provides a range of therapeutic supports, including psychological support as well as speech, occupational, and rehabilitation/physical therapy.

Much of this support is provided individually or for small groups of students outside of the mainstream classroom. These responses involve the continued use of what is sometimes referred to as a “medical model” of assessment, within which educational difficulties are explained mainly in terms of a student's deficits (Brussino, 2020[52]). This prevents progress in the field, not least because it distracts attention from questions about why schools fail to teach so many students successfully (Slee, 2010[53]).

A social model

In contrast to the medical model, the orientation that informs the Portuguese reforms is informed by a “social model” for responding to student differences. Rather than focusing on the characteristics of students, this involves an assessment of contextual barriers facing some students and an identification of resources, particularly human resources, that can be mobilised to overcome these difficulties (Ainscow et al., 2006[44]; Brussino, 2020[52]). In this context, staff with specialist expertise have key roles to play, not least in working collaboratively with classroom teachers to develop inclusive ways of working. However, they will need professional learning and support as they take on this different work.

Strategies for encouraging inclusion that depend on practices imported from the tradition of special education can foster new and more subtle forms of segregation, albeit within mainstream settings (Ainscow et al., 2006[44]). At the same time, parents may resist efforts to withdraw this form of individual support for their children. In this way, parental attitudes can be an obstacle to efforts to promote inclusion, as noted in UNESCO's 2020 Global Education Monitoring Report. Meanwhile, the requirement for individualised education plans – mandated by legislation in some countries – has led some school leaders to feel that many more students will require such responses, thus creating budget problems within some education systems (Kefallinou, Symeonidou and Meijer, 2020[54]).

The recognition that inclusive schools will not be achieved by transplanting special education thinking and practice into mainstream contexts opens up new possibilities. Many of these relate to the need to move from the individualised planning frame to a perspective that seeks to personalise learning through an engagement with the whole class, using approaches such as co-operative learning. The next phase of policy implementation in Portugal will need to support this move in relation to thinking and practice at the level of schools.

Student involvement

Research indicates that the active involvement of students can be an effective way of supporting the development of inclusive learning contexts (Fielding, 2001[55]; Cook-Sather, 2006[56]). In particular, there is strong evidence of the potential of approaches that encourage cooperation between students for creating classroom conditions that can both maximise participation in planned activities, while at the same time achieving high standards of learning for all members of a class (Ainscow and Messiou, 2017[57]). Furthermore, this evidence suggests that such practices can be effective in supporting the involvement of all students who are facing vulnerable situations, such as those who are newly arrived in a class, students from different cultural and language backgrounds, and those who are experiencing difficulties in learning (Johnson and Johnson, 1989[58]).

During the school visits, the discussions with students proved to be particularly informative, providing yet further evidence of the potential of their views to provide insights into the life of a school. The review team also heard encouraging accounts of how this thinking is being used effectively in some Portuguese schools. This is an example of how existing practices can be used to stimulate similar developments across the country.

Procedures for monitoring and evaluating the development of inclusive practices are under-developed

The role of evidence

Portugal has a well-established system for using statistical data to monitor the impact of policy in the field. Consistent with the principle that it is not necessary to categorise in order to intervene, this system focuses on the level of support provided for students, which reflects the principle that ”all students are equal”. However, the impression gained by the review team is that the use of evidence for monitoring and evaluating the implementation and impact of the national reform agenda at the local area and school levels is not well developed. This is a significant weakness that appears to be obstructing progress in the field.

As noted by the 2020 Global Education Monitoring Report (UNESCO, 2020[2]), evidence is vital in order to address concerns about access and equity within local education systems. In particular, it is important to know who is included, who is segregated, and who is excluded from schooling within particular contexts. Without such evidence, there can be no accountability.

To ensure accountability, there is a need for evidence in relation to the many different forms that exclusion can take, such as (UNESCO, 2012, p. 13[59]):

- **Exclusion from having the life prospects needed for learning,** e.g. living under inadequate health and well-being conditions, such as inadequate housing, food, and clothing, limited security and safety.
- **Exclusion from entry into a school or an educational programme**, e.g. being unable to pay entrance fees and tuition fees; being outside the eligibility criteria for entry; dressed in ways considered inadmissible by the school.
- **Exclusion from regular participation in school or an educational programme,** e.g. living too far to attend regularly; being unable to continuously pay for participation; being sick or injured.
- **Exclusion from meaningful learning experiences,** e.g. teaching and learning process not meeting students’ needs; not comprehensive the language of instruction and learning materials ; the student goes through uncomfortable, negative and/or discouraging experiences at school or in the programme, such as discrimination, prejudice, bullying, violence.
- **Exclusion from a recognition of the learning acquired,** e.g. learning acquired in a non-formal programme not recognised for entry to a formal programme; learning acquired is not considered admissible for certification; learning acquired is not considered valid for accessing further learning opportunities.
- **Exclusion from contributing the learning acquired to the development of community and society,** e.g. learning acquired is considered to be of little value by society; the school or programme attended is seen to have low social status and is disrespected by society, limited work opportunities; discrimination in society on the basis of socially ascribed differences that disregards any learning acquired by the person.

Engaging with evidence on these challenging issues, some of which are difficult to identify, has the potential to stimulate the search for effective ways of promoting the presence, participation and progress

of all students. Data on contextual factors are therefore needed, including an analysis of policies, practices and settings, as well as attitudes and social relationships.

However, as is widely recognised within Portugal, when data collection efforts are only focused on particular categories of students, there is a risk of promoting deficit views of students who share certain characteristics or come from similar backgrounds. As a result, the focus may be on "what is wrong with the student", rather than more fundamental questions, such as investigating the reasons behind the system failing some students, or the barriers experienced by some of students. Analysing the evidence regarding these challenging questions, including the views of students and their families, has the potential to stimulate efforts to find more effective ways of promoting the participation and progress of all students (Ainscow and Messiou, 2017[57]). This theme is further developed in the following section of the chapter.

Policy recommendations

Taking account of the analysis of strengths and challenges provided above, this section of the chapter articulates four policy recommendations for strengthening school-level responses to promote equity and inclusion. While these recommendations are far reaching, they could be introduced as part of the next phase of the reform process.

A central theme is that of making better use of the expertise that already exists within the education system. This will require an adjustment in the overall approach to implementation, one that gradually moves from an emphasis on centralised decision-making towards an approach that is led at the school and local area levels. It is suggested that these recommendations should be introduced as part of a shorter-term process over the next three years or so.

Introduce a programme of professional learning that is focused on the promotion of inclusive classroom practices

Developing inclusive practices

A central challenge for the Portuguese education system as it moves forward with its reform agenda will concern the development of inclusive classroom practices in every school. This also has significant implications for those involved in leadership roles at the school level. It means that school leaders will have to stimulate and coordinate professional learning amongst their staff to develop inclusive practices. It will also require a gradual adjustment in the strategy for supporting implementation of the reform policy, one that moves towards a greater emphasis on school-led developments and local area coordination.

Research suggests that teachers who are effective in providing experiences that facilitate the participation of all students taking into account their individual learning styles pay attention to key aspects of classroom life (Florian, Black-Hawkins and Rouse, 2016[60]). First, teachers recognise that the initial stages of any lesson or activity are particularly important if students are guided to understand the purpose and meaning of what is to occur. Specifically, effective teachers aim to help their students to recall previous experiences and knowledge to which new learning can be connected. Another key element is how some teachers use available resources to stimulate and support participation. Most significantly, effective teachers seem to be aware that the two most important resources for learning are themselves and their students (Ainscow, 1999[61]).

The idea of using the potential of students as a resource for one another seems to be a particularly powerful strategy for developing inclusive learning but, regrettably, it is one that is often overlooked (Johnson and Johnson, 1989[58]). A striking feature of lessons that encourage participation is the way in which students are often asked to think aloud, sometimes with the class as a whole as a result of the teacher's sensitive questioning, or with their classmates in well-managed small group interactions

(Ainscow, 1999[61]). All of this provides opportunities for students to clarify their own ideas, while, at the same time, enabling members of the class to stimulate and support one another in their learning process (see Box 4.1).

Box 4.1. Co-operative learning

The use of co-operative group work in some countries has illustrated its potential for creating classroom conditions that can both maximise participation, while at the same time achieving high standards of learning for all students.

There is strong evidence to suggest that where teachers are skillful at planning and managing the use of co-operative group learning activities as part of their repertoire, this can lead to improved outcomes in terms of students' academic, social and psychological development. These approaches have also been found to be an effective means of supporting the participation of diverse students, including those who are new to a class, students from different cultural or linguistic backgrounds, and those with special education needs.

However, it is important to stress the need for skills in orchestrating this type of classroom practice. Poorly managed group approaches usually lead to less efficient time management and can present many opportunities for increased disruption.

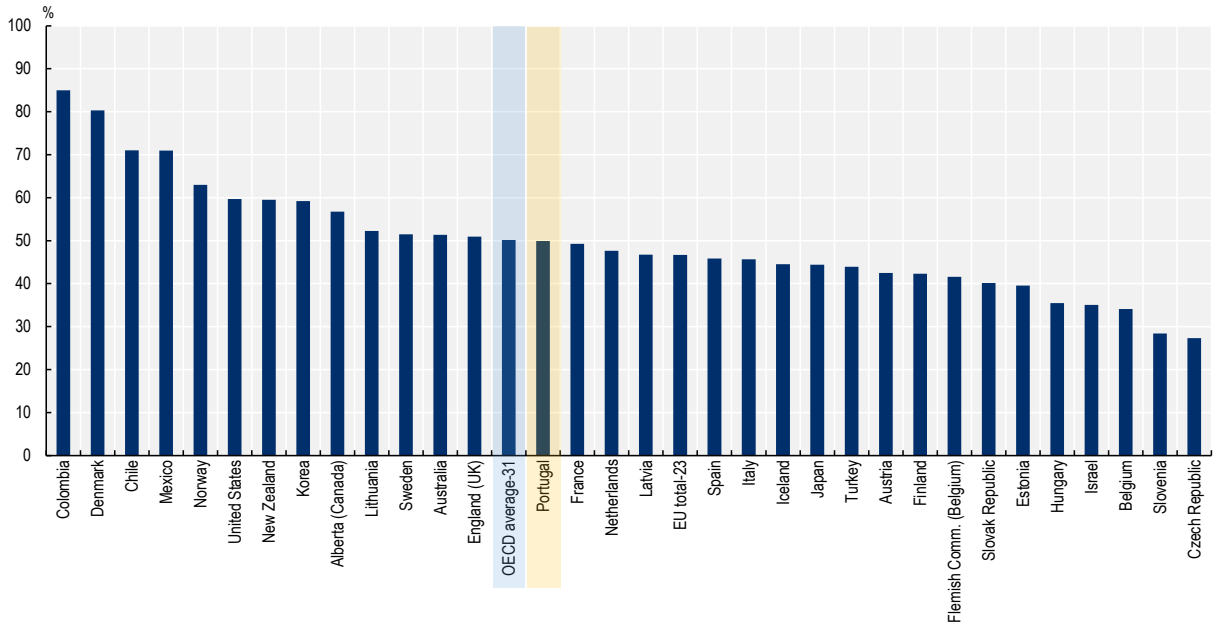
Source: Johnson & Johnson (1989[58]), *Leading the co-operative school*.

This argument for greater use of collaborative learning is highlighted by evidence from TALIS 2018. It notes that, in Portugal, only 49.9% of teachers included in TALIS 2018 reported to frequently or always have students working in small groups to come up with a joint solution to a problem or task (OECD, 2019[4]). While this value does not differ substantially from the average across OECD countries, namely 50.1%, it suggests the significant room for growth for Portuguese schools to engage students in collaborative learning more frequently (see Figure 4.6).

Figure 4.6. Teaching practices (TALIS 2018)

Results based on responses of lower secondary teachers

Percentage of teachers who reported that they "frequently" or "always" have students work in small groups to come up with a joint solution to a problem or task



Notes: These data are reported by teachers and refer to a randomly chosen class they currently teach from their weekly timetable.
OECD average-31: arithmetic average based on ISCED 2 teacher data across 31 OECD countries and economies with adjudicated data. The report refers to the average teacher "across the OECD" as equivalent shorthand for the average teacher "across the 31 OECD countries and economies participating in TALIS".
Source: OECD (2019[4]) *TALIS 2018, Results (Volume I): Teachers and School Leaders as Lifelong Learners*, Table I.2.1
https://dx.doi.org/10.1787/1d0bc92a-en.

StatLink https://stat.link/kv08h3

Developing the expertise of teachers

As the Portuguese education system becomes more inclusive, professional learning will be particularly important, not least because of new major challenges that teachers face as they are required to respond to a greater diversity of students in their classes.

Reflecting on the findings of UNESCO's 2020 Global Education Monitoring Report, which investigated social, economic and cultural mechanisms that discriminate against disadvantaged children, youth and adults, Antoninis et al. (2020[62]) argue that all teachers should be prepared to teach all students. They state:

> *"Inclusive approaches should not be treated as a specialist topic but as a core element of teacher education, whether initial education or professional development. Such programmes need to focus on tackling entrenched views of some students as deficient and unable to learn. Head teachers should be prepared to implement and communicate an inclusive school ethos. A diverse education workforce also supports inclusion" (p. 105[62]).*

Similarly, specialist support staff who find the context and focus of their work changing in major ways will also need ongoing professional learning. International research (Avalos, 2011[45]; Cordingley et al.,

2005[46]; Earley and Porritt, 2014[47]) suggests that, in order to make a difference in respect to practice and student outcomes, professional learning must:

Take place primarily in classrooms, where practice is developed to

- connect to and build on the expertise available within the school, making connections with existing knowledge
- create co-operative spaces where teachers can plan together, share ideas and resources and have opportunities to observe one another working
- engage teachers in developing a common language of practice that assists individuals in reflecting on their own ways of working, on the thinking behind their actions and on how to improve.

Sharing practices amongst staff within a school is a particularly effective means of encouraging professional learning (Butler and Schnellert, 2012[63]; Hiebert, Gallimore and Stigler, 2002[64]). It is therefore important that practitioners collaborate with and support their colleagues in reflecting on their practices and building team knowledge and skills (see Box 4.2).

Box 4.2. Teachers learning from teachers

The Pirtti school, located in the city of Kuopio in Finland, has established a co-teaching arrangement that promotes co-operative learning and teamwork in planning, teaching and evaluation. This practice was used to combine a mainstream class and a special class of third grade students (i.e. 9 year-old students).

For a period of four years, the class was taught together and the teachers were jointly responsible for this group. Later, a similar partnership started between classes from the first and third grades, and this group was taught together by teachers for a period of six years.

A review of the practice found that teachers' motivation increased significantly. Teachers indicated that working together gave them the strength to manage and develop their work. Of course, this approach requires time for joint planning and seamless collaboration. Overall, the results showed benefits, not only for the teachers, but also for students and their parents.

Source: Bruun and Rimpiläinen (n.d.[65]), "Co-operative teaching for inclusion in Finland. Inclusive Education in Action: Empowering Teachers: Empowering", http://www.inclusive-education-in-action.org (accessed on 17 December 2021).

Strengthening collaboration

In introducing this form of school-based professional learning, it is important to keep in mind that much of what teachers do during the intensive encounters that occur in classrooms is carried out at an automatic, intuitive level. Furthermore, teachers have little time to stop and think. This is why having the opportunity to see colleagues at work is crucial to the success of attempts to develop practice. It is through shared experiences that colleagues can help one another to articulate what they currently do and define what they might like to do (Hiebert, Gallimore and Stigler, 2002[64]). It is also the means whereby space is created within which taken-for-granted assumptions about particular groups of students and what they might achieve can be subjected to mutual inquiry and reflection. This factor is crucial to the promotion of inclusive practices and is a feature of schools that make progress in relation to equity and inclusion (Ainscow, 2020[38]).

As a result of a review of publications on teacher professional learning, Avalos (2011[45]) highlights collaboration as an important facilitator for professional learning amongst teachers, in particular for altering or reinforcing teaching practices. Running through current thinking there is also an assumption

that practitioners have to take greater responsibility for their own professional learning. For example, Hayes (2000[66]) suggests that effective teacher learning can be promoted if and when used in line with collaborative and context-specific involvement of teachers, who have ownership over their personal development.

Walling and Lewis (2000[67]) argue that only in recent years teacher learning has been considered a continuing process, where growth and development opportunities are made available through planned experiences and opportunities within the context of general teaching activities. This has been identified as a ”new paradigm” (Villegas-Reimers, 2003[68]).

A language of practice

The starting point for developing inclusive practices is therefore with the sharing of existing approaches through collaboration amongst staff, leading to experimentation with new practices that will reach out to all students (Ainscow, 2016[34]). Relevant to this, Lefstein, Vedder-Weiss and Segal (2020[69]) point to the importance of the conversations embedded in teachers' day-to-day work, through which they learn from one another what it means to be a teacher and how to perform their duties. These authors go on to explain how professional knowledge and skills, much of which are implicit, are learnt ”on the job”, through participation in work practices and informal interactions with colleagues. This means that professional knowledge is intimately related to the practices through which it is constructed and to which it is applied. Given the situated nature of knowledge, ideas constructed with colleagues at school are more likely to be used within a school, whereas ideas constructed within professional learning workshops and courses are only likely to be applied in the social practice of participating in such events.

This points to the importance of a shared professional language developed within a school, through with which colleagues can talk to one another and to themselves, about detailed aspects of their practice. Without such a language, teachers find it very difficult to experiment with new possibilities (Huberman, 1993[42]). An engagement with evidence is particularly crucial in providing the stimulus for professional learning aimed at the development of inclusive thinking and practice.

Particularly powerful techniques for generating evidence involve teachers using mutual lesson observation, sometimes through video recordings, and comments collected from students about teaching and learning arrangements within a school (Ainscow and Messiou, 2017[57]). Under certain conditions, such approaches provide ”interruptions” that create opportunities for reflection that can stimulate self-questioning, creativity and action (Brussino, 2021[48]). In so doing, they can lead to a reframing of perceived problems that, in turn, draws the teacher's attention to overlooked possibilities for addressing barriers to participation and learning. In this way, differences amongst students, staff and schools become a catalyst for improvement (see Box 4.3).

Box 4.3. Engaging with the voice of students in *Canelas* school cluster, Vila Nova de Gaia (North)

At the school level, engaging with the views of students can lead to changes in understandings and practices and foster the development of an inclusive school culture (Ainscow and Messiou, 2017[57]). It can nonetheless be a challenging process that might require changes in pedagogies and mentalities (Ibid.).

Portuguese schools provide some examples of practices that promote students' voice and initiatives. For instance, in the Canelas school cluster, students can design a project related to inclusion and/or human rights and ask the school for support to implement it. This school cluster also uses students' voice and experiences to strengthen inclusion. It has implemented a programme to discuss gender, gender minority and sexual orientation-related issues in which students organise the debates and teach other students.

There is, nonetheless, still a long way to go. During the review team's visit, various students in different schools pointed out that they were rarely asked to share their views and that most decisions that impacted them were taken without previous consultation.

Source: Information obtained during OECD Review team visit.

This raises questions about how best to introduce such forms of teacher learning. A promising approach that could be particularly relevant to Portugal is that of "lesson study", a systematic procedure for the development of teaching that is well-established in Japan and some other Asian countries (Hiebert, Gallimore and Stigler, 2002[64]; Lo, Yan and Pakey, 2005[70]; Stigler and Hiebert, 1999[71]). The goal of lesson study is to improve the effectiveness of the experiences that the teachers provide for all of their students (see Box 4.4). The core activity is collaboration on a shared area of focus that is generated through discussion. The content of this focus is the planned lesson, which is then used as the basis of gathering data on the quality of experience that students receive. These lessons are called "research lessons" and are used to examine teachers' practices and students' responsiveness to the planned activities. Members of the group work together to design the lesson plan, which is then implemented by each teacher. Observations and post-lesson conferences are arranged to facilitate the improvement of the research lesson between each trial.

Box 4.4. Students helping teachers to innovate

"Diversity in our school is now seen as an opportunity, when approached through collaborative work"

"The exchange of ideas and research work in teams makes diversity evolve from a problem into a challenge"

These are typical comments from teachers at *Escola Secundária Pedro Alexandrino* (ESPA), a secondary school situated in Lisbon. For these teachers, diversity is a central issue in their day-to-day work. Over recent years, the school has made many efforts to reflect this diversity. These have involved trios of teachers supporting one another in analysing how to make their lessons more inclusive. For example, one trio focused on this question: "Do all students participate in all the tasks of our lessons?"

The findings from these activities led teachers to explore how students could be partners in education, participate in planning and, sometimes, teaching lessons. Teachers found that collaborating with their colleagues and with students has led them to think in new ways about how to best respond to student diversity. This enhanced collaboration also gave them greater confidence to experiment with different teaching practices.

Source: Messiou et al. (2016[72]), "Learning from differences: a strategy for teacher development in respect to student diversity", *School Effectiveness and School Improvement,* 10.1080/09243453.2014.966726.

Engaging with evidence

Underlying these ways of using collaboration to promote equity and inclusion within schools is a common pattern. Most importantly, they involve an engagement with various kinds of evidence collected by practitioners, sometimes with support from university researchers. Usually, this begins with a consideration of an established set of practices that are largely taken for granted. An interruption occurs that problematises these practices and provokes consideration of why current practices are the way they are and how they might be improved. This may then lead to actual changes in practices. There are no compulsory requirements for initial teacher preparation to train prospective teachers for diversity, equity and inclusion.

Given the focus on developing more equitable and inclusive ways of working, this pattern entails two important questions:

- What is it that provokes the problematisation of established practice?
- Why does this necessarily lead to more inclusive ways of working?

In addressing these questions, it is helpful to draw on the idea of "communities of practice, as developed by Wenger (1998[73]), focusing specifically on the way he sees learning as "a characteristic of practice"". Wenger explains practice in terms of those actions that individuals within a community do, drawing on available resources, to achieve a set of shared goals. This goes beyond how practitioners complete their tasks to include, for example, how they make it through the day and deal with the pressures and constraints within which they have to operate. Thus, practices are ways of negotiating meaning through social action, which underlines the importance of the conversations embedded in teachers' day-to-day work, referred to earlier in this chapter.

In explaining this process, Wenger argues that communities "reify" their practices by producing concrete representations of them, such as tools, symbols, rules and documents (and even concepts and theories). However, these reifications have to be given meaning through a process of participation, which consists

of the shared experiences and negotiations that result from social interaction within a particular group. Wenger provides some helpful guidelines for judging whether a particular social collective can be considered as a community of practice. He argues that, since such a community involves mutual engagement, a negotiated enterprise, and a repertoire of resources and practices, then its members should be expected to:

- interact more intensively with, and know more about, others in the group than those outside the group
- hold their actions accountable (and be willing for others in the community to hold them accountable) more to the group's joint enterprise than to some other enterprise
- become more able to evaluate the actions of other members of the group than the actions of those outside the group
- draw on locally produced resources and artefacts to negotiate meaning, more so than those that are imported from outside the group (Wenger, 1998[73]).

Managing change

This relationship between practice and local meaning making suggests that external policy agendas cannot simply be imposed on communities of practice. Specifically, external proposals for change - such as the Portuguese reforms - however powerfully enforced, have to be endowed with meaning within local contexts before they can inform practice. This implies that schools (or, at least, the communities of practice within schools) may negotiate local meanings for those agendas that are different from those of the formulators themselves or, indeed, of other schools.

All of this has crucial implications for the way Portugal formulates its next phase of development in relation to equity and inclusion. Put simply, this will need powerful and well-managed strategies for managing change, particularly at the levels of schools and local areas.

This way of thinking is based on the idea that schools and their local communities have untapped potential to improve their capacity for improving the achievement of all of their students, not least those from socio-economically disadvantaged backgrounds and other vulnerable groups. The challenge therefore is to mobilise this potential. This reinforces the argument that moving towards the promotion of inclusive practices involves a social process with practitioners learning from one another, from their students, and from others involved in students' lives.

When reflecting on how this thinking might be used to support the implementation of the Portuguese reforms it is essential to recognise that it does not offer a straightforward recipe that can be lifted and transferred from place to place. Rather, it defines an approach to improvement that uses processes of contextual analysis to create strategies that fit particular circumstances (see, for example, the initiative described in Box 4.5). As explained above, this involves an engagement with various forms of evidence, leading to the development of locally determined improvement pathways. In this way, those involved probe beneath the surface of headline performance indicators to understand how local dynamics shape particular student outcomes. Doing so helps to identify barriers to progress as well as resources that can inject pace into efforts to progress. What is distinctive in the approach is that it is mainly led within schools, with senior school staff having a central role as 'system leaders' (Hopkins, 2007[74]). As argued earlier, this requires new thinking, practices and relationship across education systems.

Box 4.5. Every Dundee Learner Matters

In Scotland (United Kingdom), the city of Dundee has introduced a city-wide improvement strategy based on the principles of equity and inclusion. The aim is to improve the quality of education for all children and young people in the city. Developed and coordinated by a group of experienced head teachers, with support from local authority staff, the guiding vision is of a high performing system that is at the forefront of developments to find more effective ways of ensuring the progress of all students, particularly those whose progress is a cause for concern. Central to this vision is a system that is driven collectively by school leaders and involves practitioners at all levels in taking shared responsibility for improving the quality of education in all schools across the city.

The focus is on three intended outcomes: i) presence – ensuring that all children and young people attend regularly and promptly; ii) participation – creating a climate within nurseries and schools where all children and young people feel welcome and valued; and iii) progress – developing policies and practices that maximise the achievement and ambitions of all children and young people.

The Every Dundee Learner Matters strategy involves partnerships made up of three or four schools that are at different stages of development. Each school has a staff inquiry group that has responsibility for co-ordinating a process of school-based collaborative action research and development. In addition, occasional seminars are held for head teachers to support them in creating the organisational conditions necessary for the success of the strategy within their schools.

Source: Dundee City Council (2021[75]), https://www.dundeecity.gov.uk/news/article?article_ref=3971 (accessed on 18 November 2021).

A framework that can help in the promotion of an inclusive dialogue within a school, a group of schools or, indeed, across a local area, is provided by the Index for Inclusion (see Box 4.6, which explains its use in a Portuguese school), a review instrument developed originally for use in England (United Kingdom) but now available in many languages, including Portuguese (Booth and Ainscow, 2002[76]).

The Index is intended to help draw on the knowledge and views of teachers, students, parents/guardians and community representatives about barriers to participation that exist within the existing cultures, policies and practices of schools to identify priorities for change. In connecting inclusion with the detail of policy and practice, the Index encourages those who use it to build their own view of inclusion, related to their experience and values, as they determine which policies and practices they wish to promote or discourage.

Box 4.6. Using the Index for Inclusion

In a large urban secondary school in Portugal, a team of eight teachers, led by the principal, carried out surveys of staff, students and parents using the indicators from the Index for Inclusion. As a result of their findings, they recommended to their colleagues that efforts needed to be made to address what they saw as three inter-connected priority areas in order to make their school more inclusive. These areas were summarised as follows:

Priority 1: During lessons students are encouraged to work together

- Do lesson activities require students to collaborate?
- Do teachers ask students to discuss the content of lessons?
- Do teachers help students to learn the skills of working together?

Priority 2: Students support one another

- Do students talk to each other about their learning tasks?
- Do students feel that their classmates help them?
- Are any students ignored by other members of their class?

Priority 3: Staff development policies support teachers in responding to student diversity

- Are there meetings where teachers can share their ideas?
- Do teachers have opportunities to observe one another's practices?
- Do teachers feel that they are supported in dealing with difficulties?

Over a period of a year, the school used these indicators and questions as a framework for moving practice forward. This also provided a means of collecting more detailed evidence through mutual classroom observations, including group analysis of video recordings.

Source: Ainscow (2003[77]), *Using teacher development to foster inclusive classroom practices.*

An inclusive culture

International research that examines the effectiveness of school actions in promoting inclusion suggests that some schools are characterised by an "inclusive culture" (Dyson, Howes and Roberts, 2004[40]). Within these schools, there is a degree of consensus among adults around values of respect for difference and a commitment to offering all students access to learning opportunities.

The extent to which these inclusive cultures lead directly and unproblematically to enhanced student participation in school and classroom activities is not clear. Some aspects of these cultures, however, can be seen as participatory by definition. For instance, respect for diversity from teachers may be understood as a form of participation by students within a school community. Moreover, schools with these cultures are also likely to be characterised by forms of organisation (such as specialist support being made within the mainstream classroom, rather than by withdrawal for separate support) and practices (such as co-operative group work) which could be regarded as participatory by definition.

It is predictable that the introduction of significant changes in the ways those in schools work will lead to periods of organisational 'turbulence' (Hopkins, Ainscow and West, 1994[78]). The nature of this phenomenon will vary from place to place, but it generally arises as a result of the reactions of individuals to ideas and approaches that disrupt the status quo of their day-to-day lives. It is worth noting, however, that there is research evidence suggesting that without periods of turbulence, successful, long-lasting

change is unlikely to occur (Fullan, 2007[12]). In this sense, turbulence can be seen as a useful indication that the situation is changing. At the same time, this underlines the importance of skilled school-level leadership in creating the organisational conditions to support those involved as they face new challenges to their thinking and practices.

Implications for leadership practices

Particular forms of leadership are known to be effective in promoting inclusive practices (Riehl, 2000[41]; Ainscow and Sandill, 2010[79]). These approaches focus attention on teaching and learning; create strong communities of students, teachers and parents; nurture the understanding of a culture of inclusion among families; and foster multi-agency support. Unlike mechanistic views of educational improvement, these approaches acknowledge that decisions about how to improve schools always involve moral and political reasoning, as well as technical considerations. Therefore, having discussions about equity and inclusion can help to articulate the values that underlie which, how and why changes should be made in schools.

All of this means that attempts to develop inclusive schools should pay attention to the building of consensus around inclusive values within school communities. This implies that school leaders should be selected in the light of their commitment to inclusive values and their capacity to lead in a participatory manner (Riehl, 2000[41]). They will need professional learning opportunities that will support them in putting this stance into action. Once again, this should involve the active participation of practitioners to strengthen their practices (Box 4.7).

Box 4.7. Promoting ethical leadership

An action learning study carried out by Harris et al. (2017[80]) involved a network of schools in the state of Queensland, Australia. Together, these schools explored how ethical leadership could promote ways of interpreting and using various forms of evidence to enhance learning and equity.

School leaders in the schools engaged in action learning projects related to the promotion of equitable leadership. They valued this approach, which helped to generate a language of review and reflection on practice that supported the promotion of greater equity for all of their students. Specifically, this approach showed the importance of school leaders engaging with the varied views of students, teachers, communities, authorities and university researchers in ways that challenged existing practices and led to collaborations for more equitable learning outcomes.

School leaders in the network were seen as sources of mutual challenge and support, bringing their experiences and perspectives to the discussions taking place among one another. In this way, the action learning process experienced by the school leaders during network meetings became the process by which their own leadership practices were challenged and developed.

Source: Harris et al. (2017[80]), *Promoting equity in schools: collaboration, inquiry and ethical leadership.*

None of this provides a straightforward mechanism for the development of more inclusive practices. Bartolome (1994[81]) explains that any space for reflection that is created as a result of engaging with evidence may sometimes be filled by conflicting agendas. She argues that design, selection and use of particular teaching approaches arise from perceptions about learning and students. Therefore, even the most pedagogically advanced methods are likely to be ineffective in the hands of those who implicitly or explicitly subscribe to a belief system that regards some students, at best, as disadvantaged and in need of ‘fixing’, or at worst as deficient and therefore ‘”beyond fixing”.

This means that the concern with the principles of equity and inclusion needs to focus not just on ways of working, but also on the thinking that is behind actions and the impact that this thinking has on practices.

This requires a concern with the attitudes and assumptions that influence what teachers do, some of which may be unconscious (Sadker et al., 2009[82]), as well as a reflection on how these can be modified through dialogues with others, especially with students themselves (Brussino, 2021[48]).

Resources for promoting inclusive practices

The approach to professional learning recommended here is radically different to traditional approaches based on attendance at courses and workshops, where participants are largely passive recipients of other people's ideas. Its introduction will therefore need careful planning at the national level and dynamic coordination of its implementation at the local level. It will also be important to involve practitioners as active participants in the process.

In taking this challenging agenda forward in Portugal it would be helpful to draw on the recently revised resource pack, *Reaching Out to All Learners*, developed by the UNESCO International Bureau of Education. Informed by international research evidence, these materials are intended to influence and support inclusive thinking and practices at all levels of an education system. Consequently, the materials are designed to be relevant to teachers, school leaders, district level administrators, teacher educators and national policy-makers (see Box 4.8).

Box 4.8. Reaching out to all learners

This resource pack of professional learning material targets the practicalities of addressing the challenge of promoting equity and inclusion in schools and other education centres, such as early childhood education and care, and further education provision.

More specifically, the resource pack focuses on three strategic questions: i) how can schools be developed in order to respond positively to student diversity?; ii) how can classroom practices be developed that will ensure that lessons are inclusive?; and iii) how can practitioners engage families, partner schools and the wider community in their efforts to become inclusive and equitable?

While the materials can be read and used by individuals, they were designed to encourage collaborative forms of professional learning in different settings. These are i) within individual or groups of schools to promote the development of policies and practices; ii) as part of in-service courses or workshops for teachers; iii) within collaborative action research projects involving schools working with the support of university staff; and iv) within pre-service teacher education courses (although some of the activities included in the resource pack will need to be revised in light of the limited experiences of participants).

Source: UNESCO/IBE (2016[83]), *Training Tools for Curriculum Development. Reaching Out to All Learners : a Resource Pack for Supporting Inclusive Education*, www.ibe.unesco.org/sites/default/files/resources/ibe-crp-inclusiveeducation-2016_eng.pdf (accessed on 18 November 2021).

In addition, UNESCO has published a range of professional learning materials intended to influence and support inclusive thinking and practices at all levels of the education system.[6]

Other relevant resources have been made available by the European Agency for Special Needs and Inclusive Education, such as those developed through the Raising the Achievement of All Learners in Inclusive Education project (Donnelly and Kefallinou, 2017[84]). These materials provide a synthesis of country information and findings from the project's practical work. They also discuss the particular challenges of promoting academic achievement amongst all students.

In addition, the European Agency has worked with UNESCO to produce a collection of case studies in order to support stakeholders (e.g. policy makers, teachers and educators, researchers, development partners, NGOs) in developing and implementing equitable and inclusive education policies, programmes and practices.[7]

Leadership development

The use of these forms of school-based professional learning materials demands organisational flexibility and the active support of senior staff who must be prepared to encourage and support processes of experimentation within their schools (Leithwood and Riehl, 2005[85]). Where this is focused on issues related to student diversity, it is likely to challenge the way of thinking of those within a particular organisation (Ainscow, 2007[86]). Therefore, leaders at all levels need to encourage the conditions within their organisations for challenging discriminatory, inequitable and non-inclusive educational practices. In particular, senior staff in schools need to build consensus and commitment towards putting the universal values of equity and inclusion into practice.

Crucial to all this is the development of forms of leadership that encourage an inquiring stance amongst school staff and a climate that supports a degree of risk taking. An approach to leadership development that may be relevant in Portugal is that of ”action learning”, a collaborative inquiry approach originally developed by Reg Revans, an English physicist (Bray et al., 2000[87]). This involves the creation of action learning ”sets”, i.e. groups of colleagues that work on solving real problems through repeated cycles of action and reflection (see Box 4.9). In this way, the action learning process encourages the sharing of expertise, while also offering challenges to existing leadership practices.

Box 4.9. A leadership action learning process

A partnership of head teachers in England (United Kingdom) focused on the issue of how leadership can influence student behaviour. Their work started from an assumption that the behaviour of students in schools should be understood in respect to their learning and the contexts in which learning is meant to take place. Based on this, the focus of their work was put on the nature of leadership practice and how it develops. The group of head teachers also assumed that the development of leadership practice starts from personal experience and involves forms of social learning, as those within a given workplace explore ways of solving the practical problems they face as they carry out their duties.

During the first two years, a "think-tank" of ten head teachers (five from primary schools and five from secondary) interested in taking this agenda forward in their schools met termly to share ideas. Their discussions focused on the question: "What forms of leadership practice encourage behaviour that facilitates the learning of all students within a school?" During the second phase, four networks of schools (i.e. 26 schools in total) used the material produced by the think tank to review and develop their leadership practices. Heads and other senior staff from these schools formed local action learning groups, adopting a process similar to that used within the think tank. Each group was facilitated and supported by a head teacher from the original think-tank. At the same time, the participants were encouraged to use the materials to facilitate a similar review and development process with the leadership teams in their own schools.

Source: Fox and Ainscow (2006[88]), *Moving leadership practice in schools forward*.

Formulate clear guidance on the use of support resources within schools and communities

Specialist resources

Within Portugal, there is an impressive range of additional professional and community support available that can be mobilised to support the development of inclusive practices, including the CRIs and the multidisciplinary teams set up to promote inclusive education for particular students. The review team was fortunate to meet representatives of many of these groups. What was striking was their commitment to current policies and their desire to put them into practice.

A particular strength is the existence of many specialist staff, there to support vulnerable students. However, the new thinking emphasised by Portuguese national policy will require significant changes in their thinking and practice. As explained above, progress towards a more inclusive education system requires a move away from practices based on the traditional perspectives of special education (see Box 4.10). In particular, it involves a shift away from explanations of educational difficulties that concentrate on the characteristics of individual students and their families, towards an analysis of the contextual barriers to participation and learning experienced by students. Within this formulation, efforts to promote inclusion are seen as a continuous process. An inclusive school is therefore one that is on the move, rather than one that has reached a perfect state (UNESCO, 2017[33]).

Box 4.10. Mobilising support

For more than 30 years, New Brunswick, Canada, has pioneered the concept of inclusive education through legislation, local authority policies and professional guidelines. More recently, New Brunswick adopted Policy 322 on Inclusive Education the first province-wide policy mandated by the Minister of Education.

The policy sets out the requirements to implement inclusive school environments where student-centred learning approaches are promoted for the inclusion of all students. The policy is a legally binding policy and has been used a model by other education systems, both in Canada and other regions of the world, to promote inclusive education for all students.

This policy defines the critical elements of an inclusive education system that supports students in common learning environments and provides supports for teachers. It sets clear requirements for school practice, including procedures for the development of personalised learning plans, inclusive graduation, as well as strict guidelines when a variation of the common learning environment may be required.

Source: Aucoin, Porter and Baker-Korotkov (2020[16]), "New Brunswick's journey to inclusive education", https://doi.org/10.1007/s11125-020-09508-8.

Collaborative problem solving

The new thinking that informs Portuguese educational policy provides those with a background in special education with new opportunities for representing the interests of those students who are marginalised within existing educational arrangements. For this to happen, however, there needs to be greater clarity about the roles of specialist support staff.

With this in mind, the roles of the multidisciplinary teams in each school needs refining in order that they can formulate and coordinate inclusive school improvement strategies. At present, the teams mainly work at the level of the cluster, where they seem to be an effective means of ensuring that support is allocated to individual students, as and when necessary. In order to support the development of inclusive classroom practices, however, they will need to involve planning that is much more closely linked to the day-to-day work of teachers. One possibility would be for sub-teams to be introduced that are focused on particular sections of a school.

In some countries, this approach takes the form of what are called "improvement boards", particularly in schools where student progress is a cause for concern (Ainscow, Chapman and Hadfield, 2020[18]). Meeting monthly and chaired by the school director, these boards involve a small group of key stakeholders who plan activities to move practices in their schools forward with pace (see Box 4.11). This process involves a new, more powerful form of accountability. This is unlike traditional top-down approaches, with their emphasis on reporting to external agencies. Instead, it involves a form of mutual accountability, where those involved share responsibility and hold one another accountable for making change happen.

Box 4.11. The Accelerated Improvement Boards in Wales (United Kingdom)

Government officials have been surprised by the impact of these boards, which are intended to coordinate and inject pace into school improvement efforts, focusing in particular on those students whose progress is a matter of concern. The power of the boards seems to be that they emphasise the importance of head teachers taking responsibility for improvement strategies, using a small number of key outsiders as sources of support and challenge.

The fact that the boards meet monthly ensures that pace is maintained and that those involved hold one another accountable for carrying out agreed tasks. The notes of the meetings provide an efficient means of keeping stakeholders informed in ways that avoid time-wasting reporting arrangements. It is encouraging that this strategy is now being introduced more widely across Wales.

Source: Ainscow, Chapman and Hadfield (2020[18]), Changing education systems: a research-based approach.

Relevant to this, Alves, Campos Pinto and Pinto (2020[5]) report that Decree Law No. 54/2018 was amended in September 2019, to give greater power to parents and caregivers, who are now recognised as "variable members of the multidisciplinary teams" (Law No. 116/2019, Art. 4a) and entitled to participate in the elaboration and evaluation of technical-pedagogical reports, in addition to the Individual Education Plans (IEPs) as the previous Decree Law already allowed. On the other hand, schools (through their multidisciplinary teams) are now required to define indicators to assess the efficacy of the measures implemented (Law No. 116/2019, Art. 5). Additionally, the Government took on the responsibility to develop the statistical indicators for evaluating its inclusive education policy (Law No. 116/2019, Art. 33.7).

Community resources

Moving beyond what happens within schools, there is a need to draw on the support of other actors in the wider community who have significant roles in the lives of children and young people. These include parents/caregivers; teacher educators and researchers; national, local and school-level administrators and managers; policy makers and service providers in other sectors (e.g. health, child protection and social services); civic groups in the community; and members of minority groups that are at risk of exclusion. The preoccupation with equity means that this also requires a particular concern to giving voice to those who may be powerless or unheard in the decision-making processes (Groundwater-Smith, 2011[89]).

Family involvement is crucial, particularly with vulnerable students. For example, data from PISA 2018 shows that, on average across OECD countries and in half of the education systems with available data, parents of low achieving students were more likely than parents of top-performing students to report that their child's school makes an effort to get them involved in school matters (OECD, 2020[7]). This disparity may be interpreted positively for some countries, given that some of these policies, such as providing education opportunities for parents, family-support programmes and information on how to help students with homework, may be targeted to struggling students. However, it is worth noting that Portugal is one of the countries with the largest gaps in the index of school policies for parental involvement.

In some countries, parents and education authorities cooperate closely in developing community-based programmes for certain groups of students, such as those who are excluded because of their gender, socio-economic status or physical impairments (Miles, 2002[90]). A logical next step is for parents and other family members to become involved in supporting change for promoting inclusive school environments. Relevant to the current context, there are international indications that the challenges brought about by the COVID-19 pandemic have encouraged greater cooperation between schools and families (see Box 4.12).[8]

Box 4.12. Supporting the community in a time of crisis

In England (United Kingdom), the Reach Academy Feltham is a school with 900 students aged between 2 and 18. It has been committed to inclusion since its inception. Forming strong relationships with both students and parents is therefore at the core of the school's culture. This usually involves regular contact with students' families and the COVID-19 response naturally included this.

As the country went into lockdown, the staff began planning their response to the crisis. This led the school to take a lead in co-ordinating a multi-agency response across the local community. During the lockdown months, students continued their education online at home. At the primary level (ages 4-11) there was a 98% work completion rate, dropping slightly to 85% at the secondary level (ages 11-18). Senior staff put this down to the strong inclusive school culture and organisation-wide expectations.

The obvious barrier was a lack of internet access at home or a computer amongst some of the families. In the cases where ICT-related issues at home prevailed, students were invited into school to complete their online work individually. Every family received at least one contact per week from their class teacher at the nursery and primary levels, or from a familiar member of the secondary staff further up the school. For the most vulnerable parents, this increased to a daily check-in phone call or home visit. The expectation that students must submit daily work created another point of contact between the school and the families. If a student failed to submit any work on a given day, this triggered a call to make sure that everything was okay and to offer further support if required.

Source: Reach Academy Feltham (2021[91]), www.reachacademyfeltham.org (accessed on 18 November 2021).

Where parents lack the confidence and skills to participate in such developments, it might be necessary to engage and build capacity and networks. This could include the creation of parent support groups, training parents to work with their children, or building the advocacy skills of parents to negotiate with schools and authorities. Here, it is worth adding that there is evidence showing that the views of families, including children, can be helpful in bringing new thinking to the efforts of schools to develop more inclusive ways of working (Calderón-Almendros et al., 2020[11]).

Focusing on place

All of this involves strengthening the ways in which schools work with families and communities, and enriching what they offer to students. In this respect there are many encouraging examples of what can happen when school-level actions are aligned in a coherent strategy with the efforts of other local players – employers, community groups, universities and public services (Kerr, Dyson and Raffo, 2014[92]; Drever, McLean and Lowden, 2021[93]). This implies creating partnerships beyond the school, where partners multiply the impacts of each other's efforts (see Box 4.13).

This place-based approach draws on the principles underpinning the highly acclaimed Harlem Children's Zone in the United States (Whitehurst and M., 2010[94]). This involves efforts to improve outcomes for children and young people in an area of disadvantage through an approach characterised as being "doubly holistic". That is to say, the Harlem Children's Zone seeks to develop coordinated efforts to tackle the factors that create disadvantage for some students and enhance the factors which support them, across all aspects of their lives from 'cradle to career'. Dobbie and Fryer (2009[95]) describe the Children's Zone as "arguably the most ambitious social experiment to alleviate poverty of our time" (p. 1[95]).

Box 4.13. Children's neighbourhoods Scotland (United Kingdom)

In Scotland (United Kingdom), drawing lessons learnt from initiatives nationally and internationally, Children's Neighbourhoods Scotland has developed a model of community- and place-based working tailored to particular contexts.

Working in urban, small town and rural communities enables the project to explore the transferability, sensitivity, and suitability of the approach in different geographical and socio-economic contexts and to make a contribution to the evidence base and literature on place-based approaches in practice.

The programme is coordinated, supported and evaluated by a team of researchers from the University of Glasgow. Early on it was decided not to restrict the age of children and young people that might be involved, and to have geographical site boundaries that were fluid in nature. This allows the programme to be as inclusive as possible, promoting engagement and participation across age groups, while maintaining a focus on the areas the project is working in.

Source: Children's Neighbourhoods Scotland (n.d.[96]), "Our Approach", https://childrensneighbourhoods.scot/our-approach/ (accessed on 19 November 2021).

The role of researchers

Consideration should also be given to the role of researchers in support of the development of inclusive practices and leadership (see Box 4.14). Portugal has a well-established tradition of using researchers' expertise to monitor and evaluate the impact of policy changes. However, experiences in other countries have shown how researchers can also take a more active role in working alongside practitioners in developing and trialling new ways of including hard-to-reach students (Ainscow, Chapman and Hadfield, 2020[18]). The review team heard encouraging reports of new initiatives based on this perspective that are currently being planned.

Relevant to these developments, Hiebert, Gallimore and Stigler (2002[64]) suggest that fruitful forms of collaboration between practitioners and researchers require a reorientation of values and goals amongst both groups. Therefore, they argue that teachers need to move away from the dominant view that teaching is a "personal and private activity". Rather, teachers have to adopt the "more risky view" that it is an activity that can be continuously improved, provided it is made public and examined openly. At the same time, they argue that researchers must stop undervaluing the knowledge teachers acquire in their own classrooms.

Box 4.14. Teachers and researchers learning together

In England (United Kingdom), a network of primary schools has worked in partnership with a local university education department to bring teachers and researchers together. The schools followed a model of collaborative inquiry that draws on teachers' professional expertise and wider research knowledge, to explore new ways of supporting students from socio-economically disadvantaged backgrounds. Overall, the aim is to improve the learning opportunities, experiences and outcomes of all students, and particularly those experiencing barriers to learning.

Each school determines its research focus, starting by identifying issues that are causing concern or that are puzzling in some way. Schools then follow a structured research programme where teachers and university researchers collect and share evidence on the school's practices so that they can develop a rich and deep understanding of what is happening to students in school, and from wider research. This evidence is then used to stimulate new thinking and professional learning on current practices, and to identify strategies for responding to the research findings.

The schools have used exchange visits to generate evidence regarding their shared focus on developing more inclusive practices. The aim of these visits is to look specifically at relative strengths and weaknesses within schools in the network, using differences to stimulate new thinking. University researchers support these processes, using their specialist expertise to raise questions and help teachers collect and engage with relevant evidence.

Source: Ainscow et al. (2016[97]), *Using collaborative inquiry to foster equity within school systems: opportunities and barriers*.

Ensure that there is a coordinated structure of local support to schools and school clusters in promoting equity and inclusion

Local structures

The team heard occasional reference to the existence of regional teams, although these were little or not referred to by those in the field (for more details on regional teams, see Chapter 1). The review team also heard accounts of how some municipalities have introduced projects that promote local collaboration to address the challenges experienced by some groups of students.

In general, there still seems to be considerable uncertainty within Portugal regarding the status and roles of the various local structures that exist. In particular, the role of regional teams (e.g. Curriculum Autonomy and Flexibility teams) might be often unknown and the respective contributions of municipalities and parishes appears to vary across the country. It is therefore encouraging that new arrangements are currently being introduced to transfer various powers to municipalities regarding the management of infrastructure and facilities, human resources, social support and curricular enrichment activities more adapted to local circumstances. At the same time, as explained below, the focus should be on strengthening local networks that will encourage mutual support between clusters, building on examples of effective practice (see Box 4.15, which provides an example of an effective collaboration in Portugal).

Box 4.15. A locally coordinated partnership

Schools in one cluster in the Faro area illustrate the potential that exists within Portuguese schools. The cluster took part in a project that involved the use of collaborative action research. An important feature of the initiative was the role taken by senior staff within the cluster in co-ordinating and supporting its development, with support from the municipality.

The broader study was funded by the European Union between 2017 and 2020 and involved 30 primary schools in five European countries, namely Austria, Denmark, England (United Kingdom), Portugal and Spain. It involved teachers and students participating actively as research partners alongside colleagues from universities, with the aim of improving classroom practices.

More specifically, the study involved the use of inclusive inquiry, an approach that involves trios of teachers cooperating with their students to find ways of making their lessons inclusive. This approach involves three phases, all of which require dialogue between students and teachers. Most importantly, inclusive inquiry involves some students in learning how to use research methods to gather the views of their classmates. The dialogues that this encourages are focused on improvements in learning and teaching. This means that differences amongst students and teachers are used to reconsider existing thinking and practices in ways that are intended to encourage experimentation to foster more inclusive ways of working. This, in turn, sets out to break down barriers that are limiting the engagement of some students.

Source: Vitorino and Santos (2020[98]), "Pesquisa Inclusiva: diálogo alunos-professores como fator de promoção da educação inclusiva" [Inclusive Research: student-teacher dialogue as a factor to promote inclusive education], https://doi.org/10.34632/investigacaoeducacional.2020.9684.

International research supports such moves to strengthen local coordination. For example, having analysed "how the world's most improved school systems keep getting better", the authors of a McKinsey report express their surprise at the critical role that what they call the "mediating layer" plays between school delivery and central government (Mourshed, Chijioke and Barber, 2010[99]). This led the authors of the report to conclude that in the longer-term sustaining system improvement requires "integration and intermediation" across each level of the system, "from the classroom to the superintendent or minister's office". They explain:

> *"The operating system of the mediating layer acts as the integrator and mediator between the classrooms and the centre. This is not to suggest that school reforms should begin here. In every system we looked at, the first focus of school reforms was on the schools and the centre. Efforts to strengthen the mediating layer usually came later, as the need for an active intermediary in delivering the system improvements became clearer" (p. 82[99]).*

The authors of the report also suggest specific functions that local coordination arrangements should play, which are particularly relevant in Portugal. This does not imply the introduction of a new layer of formal governance at the local level. Rather, it would involve intermediate structures providing targeted support to schools; acting as a buffer between the centre and the schools while interpreting and communicating the improvement objectives to manage any resistance to change; and enhancing the collaborative exchange between schools, by facilitating the sharing of good practices, helping them to support each other and share learning.

In the Portuguese context, this form of local coordination could be achieved through the strengthening of regional teams and the involvement of cluster and school leaders in creating local networks of mutual support. Municipality staff would have a key role in facilitating these support networks. In addition, inspectors could monitor their impact and connect innovative developments across the country in order to encourage further sharing of effective ways of working.

Co-ordinating local partnerships

A recent report noted that four of the most successful national education systems – Singapore, Estonia, Finland, and Ontario, Canada – have what is referred to as a coherent "middle tier", regardless of their differing extents of school autonomy or devolution of decision-making (Bubb et al., 2019[100]). In particular, all these systems have district-level structures that offer a consistent view according to which, to maintain equity and excellence, there needs to be an authoritative local co-ordinating influence. In the case of Portugal, due to its governance system and the limited autonomy given to municipality in the area of education, such structures could not have an authoritative power on pedagogical matters. Rather, they would act as proximity support bodies. Such bodies should (1) support schools in the implementation of inclusive education; (2) fill the gap between schools and the central authorities that manages them; and (3) be involved in accountability strategies. Regional teams and the Inspectorate (*Inspeção-Geral da Educação e Ciência*, IGEC) can be such structures.

The argument that local coordination is particularly crucial for efforts to promote equity and inclusion is supported by various other international experiences (UNESCO, 2017[33]). In regards to this agenda, once again, context matters. That is to say, those who are nearest to the field need to be empowered to access their local circumstances in order to identify barriers that are experienced by some students and, in so doing, mobilise human resources to address these difficulties.

Box 4.16. City Challenge in England (United Kingdom)

The City Challenge was introduced as an improvement strategy in three city regions in England (United Kingdom) between 2008 and 2011, following an earlier successful initiative in London.

A detailed analysis of the local contexts led to the conclusion that plenty of good practice existed across schools in the areas. Consequently, it was decided that collaboration and networking between schools would be key strategies for strengthening the overall capacity of the system to reach out to vulnerable groups of students. More specifically this involved a series of inter-connected activities for "moving knowledge around" to build a self-improving school system.

With this in mind, "Families of Schools" were set up. This approach partnered schools that serve similar populations while, at the same time, encouraging partnerships amongst schools that were not in direct competition with one another because they did not serve the same neighbourhoods. Led by head teachers, the Families of Schools strategy proved to be successful in strengthening collaborative processes within the city regions in ways that improved outcomes for students from socio-economically disadvantaged backgrounds. In this way, expertise that was previously trapped in particular contexts became more widely available.

Source: *Hutchings et al.* (2012[101]), *Research report DFE-RR215: Evaluation of the City Challenge programme, https://www.gov.uk/government/publications/evaluation-of-the-city-challenge-programme (accessed on 18 November 2021).*

A particular set of important factors that require local coordination relate to how local schools engage with one another (see the example in Box 4.16). As noted above, there is considerable evidence that school-to-school collaboration can strengthen improvement processes by adding to the range of expertise made available. In particular, this research indicates that collaboration between schools has an enormous potential for fostering the capacity of education systems to respond to student diversity.

There is also evidence showing that when groups of schools seek to develop more collaborative ways of working, this can have an impact on how teachers perceive themselves and their work (Rozenholtz, 1989[102]). However, research suggests that certain conditions are necessary to make school-to-school collaboration effective (Chapman and Ainscow, 2021[103]). These are:

- The development of positive relationships amongst groups of schools, in some instances across the borders of local authorities.
- The presence of incentives that encourage key stakeholders to explore the possibility that collaboration will be in their own interests.
- Senior staff in schools who are willing and skilled enough to drive collaboration forward towards collective responsibility, while coping with the inevitable uncertainties and turbulence.
- The creation of common improvement agendas that are seen to be relevant to a wide range of stakeholders; and
- Coherent external support provided by credible consultants/advisers (from the local authority or elsewhere) who have the confidence to learn alongside their school-based partners, exploring and developing new roles and relationships where necessary.

The role of municipality support staff

There are important implications in all of this for the future roles of the support staff employed by municipalities. As local partnerships strengthen, they should adjust their ways of working in response to the development of improvement strategies led from within school clusters. To be able to better support school clusters and individual schools, municipalities could be given additional responsibilities within the decentralisation process. Specifically, in synergy with regional teams (e.g. for curricular autonomy and flexibility and TEIP teams), they should monitor and challenge schools in relation to the agreed goals of collaborative activities, while senior staff within clusters share responsibility for the overall leadership of improvement efforts. In taking on such roles, municipality support staff can position themselves as guardians of improved outcomes for all students and their families - protectors of a collegiate approach but not as managers of day-to-day activities.

Having analysed two relatively successful large-scale improvement initiatives, Hargreaves and Ainscow (2015[104]) argue that, in taking on these new roles, district-level (which, in the case of Portugal, would be municipal-level) staff can provide a valuable focus for school improvement. They can also be a means for efficient and effective use of research evidence and data analysis across schools, support schools in responding coherently to multiple external reform demands, and be champions for students and families, making sure everybody is treated equitably.

The problem is that not all municipalities are socio-economically equal and give the same priority to education. Therefore, a way to reduce variation amongst school districts is to promote collaboration among them so they share resources, ideas and expertise, and exercise collective responsibility for student success. In adopting this “leading from the middle” approach, municipalities can become the collective drivers of change and improvement by strengthening social capital in their area. They can contribute to better synergies between the different levels of the education system and promote bottom-up initiatives rather than exclusively top-down approach. In facilitating such developments, it can be helpful to adopt a shared framework, such as the one provided by the “ecology of equity” (Ainscow et al., 2012[26]) (see Box 4.17).

Box 4.17. An ecology of equity

Creating local area partnerships can be facilitated by the use of guiding frameworks. This one emerged from research carried out in England (United Kingdom) that led to the creation of a framework for reviewing school districts known as the "ecology of equity". This framework is based on the assumption that the extent to which students' experiences and outcomes are equitable is not dependent only on the educational practices of their teachers, or even their schools. Instead, it depends on a whole range of interacting processes that reach into the school from outside. These processes include the demographics of the areas served by schools, the histories and cultures of the populations who send (or fail to send) their children to the school, and the socio-economic realities faced by those populations.

Beyond this, they involve the underlying socio-economic processes that make some areas poor and others affluent, and that draw migrant groups into some places rather than others. These processes are also influenced by the wider politics of the teaching profession, of decision-making at the district level, and of national policy-making, as well as the impacts of schools on one another over issues such as exclusion and parental choice.

In addition, these interactive processes reflect models of school governance, the ways in which local school hierarchies are established and maintained, and the ways in which school actions are constrained and enabled by their positions in those hierarchies. Taking this perspective, it is clear that there is much that individual schools can do to tackle issues within their organisations, and that such actions are likely to have a profound impact on student experiences, perhaps also influencing inequities arising elsewhere. However, it is equally clear that these strategies do not lead to schools tackling issues between- and beyond-schools directly. No school strategy can, for example, make a socio-economically disadvantaged area more affluent or increase the resources available to students' families any more than it could create a stable student population, or tackle the global processes underlying migration patterns.

Source: Ainscow et al. (2012[26]), *Developing equitable education systems*.

Strengthen strategies for monitoring and evaluating inclusive education practices at the local and school levels

Using data for strategic planning

In order to develop a strategy for co-ordinating developments at a local area level, it will be important to carry out a contextual analysis in order to identity challenges that need to be addressed and good practices that can be built on in order to address these difficulties. As discussed with various policy makers during the review meetings, there is a major challenge for Portugal regarding the collection and use of statistical data to assess progress in relation to inclusive developments in schools and across local areas, not least because of the commendable commitment to avoid the risks associated with categorising students. This means that deciding the kind of evidence to collect and how to use it requires care, since, within education systems, "what gets measured gets done" (Ainscow, 2005[105]).

This is widely recognised as a double-edged sword precisely because it is a potent lever for change. On the one hand, data are required to monitor the progress of students, evaluate the impact of interventions, review the effectiveness of policies and processes, plan new initiatives, and so on. On the other hand, if effectiveness is evaluated on the basis of narrow, even inappropriate, performance indicators, then the impact can be deeply damaging. While appearing to promote the causes of accountability and

transparency, the use of data in practice can conceal more than they reveal, invite misinterpretation, and have a perverse effect on the behaviour of professionals. Therefore, the challenge is to harness the potential of evidence as a lever for change, while avoiding these potential problems (see Box 4.18).

The starting point for making decisions about the evidence to collect at the local area level should be with agreed definitions of equity and inclusion. In other words, the aim must be to "measure what we value", rather than, as it is often the case, "valuing what we can measure".

Box 4.18. Assessing progress in New Zealand

In New Zealand, the Government concluded that a key reason for the country's low equity and achievement outcomes was that schools had predominantly operated as autonomous, self-managing entities, loosely connected to each other, and with a distant relationship with the centre. The government argued that this autonomy had left schools to operate largely on their own and without sufficient support.

A taskforce set up to address this issue concluded that that the system faced significant and persistent challenges in delivering equitably for all children and young people, especially those who are Māori, Pacific, have special education needs, or come from disadvantaged socio-economic backgrounds.

The taskforce recommended changes to strengthen the capability of schools to undertake self-evaluation and continuous improvement, including ensuring effective engagement with communities. The taskforce committed to ensure that progress towards making these changes is considered within the broader context of improvements being made across the whole education system.

Based on this recommendation, the Ministry of Education has been developing advice on how this monitoring and reporting can be best delivered in a timely, coherent, and effective manner over the next five to ten years. The Ministry aims to ensure that their research and evaluation functions provide a strong basis for generating effective system level information and evaluation that informs prioritisation, action, and improvement. It is also argued that there is a potential for greater connectedness to make use of information and data to reduce the workload of schools in the context of monitoring and evaluation.

Source: Ministry of Education (2019[106]), *Supporting all schools to succeed.*

Developing an analytical review framework

A useful framework in relation to the use of data at the local area level is provided by the UNESCO Guide for Ensuring Inclusion and Equity in Education (UNESCO, 2017[33]). This Guide is intended to help countries review how well equity and inclusion currently figure in existing policies, decide what actions need to be taken to improve policies, and monitor progress as actions are taken. A self-assessment system is presented to accompany countries in this review exercise based on four key dimensions: concepts, policy statements, structures and systems, and practices.

Drawing on international research and on good practice related to equity and inclusion in education systems, the UNESCO Guide was developed with the advice and support of a group of international experts, including policy makers, practitioners, researchers, teacher educators, curriculum developers and representatives of various international agencies. The examples presented in the Guide allow countries to learn from the progress made in other regions of the world towards more inclusive and equitable education systems. It does this in relation to the following definitions which have proved to be valuable in a range of countries, no least in that they avoid the use of jargon:

Equity is about ensuring that there is a concern with fairness, such that the education of all students is seen having equal importance.

Inclusion is a process that helps overcome barriers limiting the presence, participation and achievement of students.

The use of these definitions suggests that evidence is needed in relation to the "presence, participation and achievement" of all students. At the same time, there is a moral duty to pay attention to those groups of students considered to be at risk of underachievement, marginalisation or exclusion, while taking care to ensure that no student is overlooked.

Generating data

In order to prevent a local area monitoring process from disadvantaging some students, it is suggested that statistical data could be generated using a sampling system, within which the identities of particular students and schools are not made public. District patterns within these data could then be shared with senior local representatives to inform their strategic planning.

Qualitative data on contextual factors are also needed, including information about the availability and use of resources and facilities, as well as on attitudes, beliefs, and social relationships. With the growing technological capacity to handle large amounts of different types of data, it is increasingly possible to generate information about the many influences that affect the inclusion, segregation, and exclusion of students within education systems. Focusing on these factors can help create the conditions for promoting equity and inclusion. As noted earlier in this chapter, the voices of students and families can be a powerful form of evidence when thinking about what barriers they face and how these might be overcome (see Box 4.19).

Box 4.19. Listening to children: Experiences in Denmark

In Denmark, the '"Children's Voice" project in Copenhagen's inner-city schools consults with parents and children to elicit their views on child's well-being and learning. The project aims to create more family-oriented actions in early childhood education and care, with everyone contributing as equal stakeholders.

The consultations are organised by professionals who create a framework for reflection in a "blame-free" atmosphere, where everybody is entitled to offer solutions to concerns that have been shared. This means that the meetings need to be well prepared, well facilitated and solution-focused. The consultation result in an action plan that the participants develop implement and evaluate jointly. Children's Voice seek to develop a unifying sense of community, grounded in individual realities, that aims particularly at building relationships.

Source: Lentz (2015[107]), "Inddragelse af 'Barnets Stemme' og udvikling af netværksmøder og læringsfællesskaber" [Involving 'Children's Voice' and developing network meetings and learning communities].

Inclusive laws and policies can be helpful in encouraging students' participation and, more broadly, the involvement of children and young people, in educational policy-making and the design of school projects (see Box 4.20). Participation of students is a fundamental right, which is embedded in international human rights treaties. In addition, strengthening the right to participation can substantially enhance children and adolescent's personal development, sense of belonging and self-worth as well as respect for others (Lansdown, Jimerson and Shahroozi, 2014[108]).

Box 4.20. The participation of children and young people in Portugal

Promoting the right to participation of children and young people has been an increasing concern in Portugal. Over time, the MoE has promoted initiatives to strengthen the participation of students in educational policy.

For example, in 2016, the MoE launched a broad discussion gathering teachers, students and parents to allow the participation of all stakeholders in the curriculum redesign process. During this process, students had the opportunity to express their views on the school and contribute with proposals in a public conference held in November 2016.

The MoE also participated in a Global Forum organised by the OECD Future of Education and Skills, 2030. As a result, a group of students became involved in the Students' Agency, within Education 2030, to participate in planning for their own education and future. This kind of seminar has since been replicated at the national level, across the country, by creating a national network involving various students, the MoE and other stakeholders.

Source: Ministry of Education (2022[3]), *OECD Review for Inclusive Education: Country Background Report for Portugal*.

Accountability and inspection

A movement towards greater responsibility for promoting equity and inclusion to the cluster and municipality levels has important implications for national accountability and inspection systems. Put simply, there has to be effective systems in place to ensure that local actions are being taken and that they are in line with national requirements.

Relevant to this concern, UNESCO's 2017/2018 Global Education Monitoring Report highlighted the responsibility of governments to provide universal quality education and stresses that accountability is indispensable in achieving this goal. The report also warned that disproportionate blame for systemic educational problems on any actor can have serious negative side effects, widening inequality and damaging learning (UNESCO, 2017[109]).

No approach to accountability will be successful without a strong enabling environment that provides actors with adequate resources, capacity, motivation and information to fulfil their responsibilities. With this in mind, the Global Education Monitoring Report calls on governments to (UNESCO, 2017[109]):

- Design accountability arrangements for schools and teachers that is supportive and avoid punitive mechanisms, especially those based on narrow performance measures.
- Allow for democratic participation, respect media freedom to scrutinise education and set up independent institutions to handle complaints.
- Develop credible and efficient regulations with associated sanctions for all education providers, public and private, that ensure non-discrimination and the quality of education.
- Make the right to education justiciable, which is not the case in 45% of countries in the world.

In terms of the current situation in Portugal, the review team heard few references to the influence of current arrangements for inspecting schools, although this may be partly due to the impact of the pandemic. Relevant to this, a recent study of inspection procedures in six countries (i.e. Austria, the Czech Republic, England (United Kingdom), Ireland, the Netherlands and Sweden), indicated the existence of varied practices across Europe (Ehren et al., 2017[110]). These variations ranged from using a low stakes approach involving inspecting schools on a regular basis without sanctions or rewards (e.g. Austria and Ireland), to school inspectorates utilising directive and focused, medium/high stakes early

warning analysis and customised inspections (e.g., the Netherlands, England (United Kingdom)). They also ranged from a centralised to a decentralised level of operation. Ehren et al. (2017[110]) study suggests that the impact of school inspections on the quality of education requires the setting of expectations, standards and norms, with self-evaluation and encouragement of capacity building and better teaching and learning as mediating mechanisms.

This points to the importance of Portuguese schools being actively involved in forms of self-evaluation, as required by national policy. During the school visits, however, only one example of this was noted. Again, this aspect could be the focus of some sharing of good practice between schools.

In this context, the research mentioned above on the benefits of school-to-school cooperation suggests that school evaluation should be carried out by "schools for schools" using forms of peer review as a stimulus for improvement (see Box 4.21). This echoes the recommendations of Fullan, Rincon-Gallardo and Hargreaves (2015[111]), who argue for a shift from a heavy reliance on external accountability towards an investment in the professional capital of teachers and school leaders. However, this shift must be challenging and credible. In other words, it should not involve forms of collusion within which partner schools endorse one another in an acceptance of mediocrity.

This concern could be addressed by involving school inspectors as moderators of the process. In this way, and as mentioned in Chapter 2, the inspection of schools in Portugal will play a key role in promoting the equity and inclusion agenda. This could be achieved through thematic inspections using samples of schools, reviewing the implementation of inclusive education practices in schools, and providing advice for the improvement of inclusive practices in schools, based on examples from different parts of the country.

Box 4.21. A peer review process in Wales (United Kingdom)

This enquiry-based process involves trios of schools in supporting each other's improvements. It consists of four stages:

Pre-enquiry. The host head teacher sends a data pack to the lead enquirer two weeks before the enquiry visit with potential lines of enquiry. The lead enquirer spends half a day considering the data and opening up possible lines of enquiry.

The enquiry visit. The enquiry team, made up of a small group of senior staff from the two partner schools visits the host school over two days. During these days:

- The lead enquirer meets the team and briefs them regarding data and lines of enquiry.
- The enquiry team meets host senior staff to discuss the lines of enquiry.
- The team engages in lesson observations, learning walks and interviews with stakeholders, including students take pace.
- During day two the team engages in: (1) further enquiry – work scrutiny, deeper observational focus on key areas, more interviews; and (2) a meeting to reflect on evidence gathered – agreement about lines of enquiry; A final meeting to offer feedback and discuss likely lines of enquiry.

Post visit.

- The lead enquirer writes the report.
- The lead enquirer creates an informal opportunity for the host head teacher to see a draft report and discuss the action plan.
- The report is formally provided to the host school within 10 working days of peer review.

Follow-up enquiry. When a school has hosted an enquiry, it may then commission a follow-up enquiry in the following year to look at its progress and impact in relation to the key lines of enquiry.

Source: Ainscow, Chapman and Hadfield (2020[18]), Changing education systems: a research-based approach.

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Notes

[1] See Decree Law No. 54/2018 (English): https://www.dge.mec.pt/sites/default/files/EEspecial/dl_54_2018_en_version_0.pdf (accessed on 09 November 2021).

[2] See list of the of accredited CRIs of the Directorate-General for Education (*Direção-Geral da Educação*, DGE): https://www.dge.mec.pt/sites/default/files/EEspecial/rede_nacional_de_centros_de_recursos_para_a_inclusaocri.pdf (accessed on 18 November 2021).

[3] The CRTICs were created in 2007 and became service providers of the Ministry of Education in 2015 (Dispatch No. 5291/2015). There are 25 CRTICs across the country (7 in the North, 6 in the Centre, 7 in the Lisbon and Tagus region, 4 in Alentejo and 1 in the Algarve). Among other elements, CRTICs are in charge of providing equipment to schools to support the learning of students with SEN and collaborate with training entities in the design of professional learning activities. See the 2015 Functioning Guide of the CRTICs for Special Education (in Portuguese):

https://www.dge.mec.pt/sites/default/files/EEspecial/guia_funcionamento_crtic_revisao_2018.pdf (accessed on 18 November 2021).

[4] See: https://link.springer.com/journal/11125/volumes-and-issues/49-3 (accessed on 09 November 2021).

[5] See: https://link.springer.com/journal/11125/volumes-and-issues/49-3 (accessed on 09 November 2021).

[6] See: https://en.unesco.org/themes/inclusion-in-education/resources (accessed on 18 November 2021).

[7] See: https://inclusive-education-in-action.org/ (accessed on 09 November 2021).

[8] See: https://en.unesco.org/covid19/educationresponse (accessed on 09 November 2021).

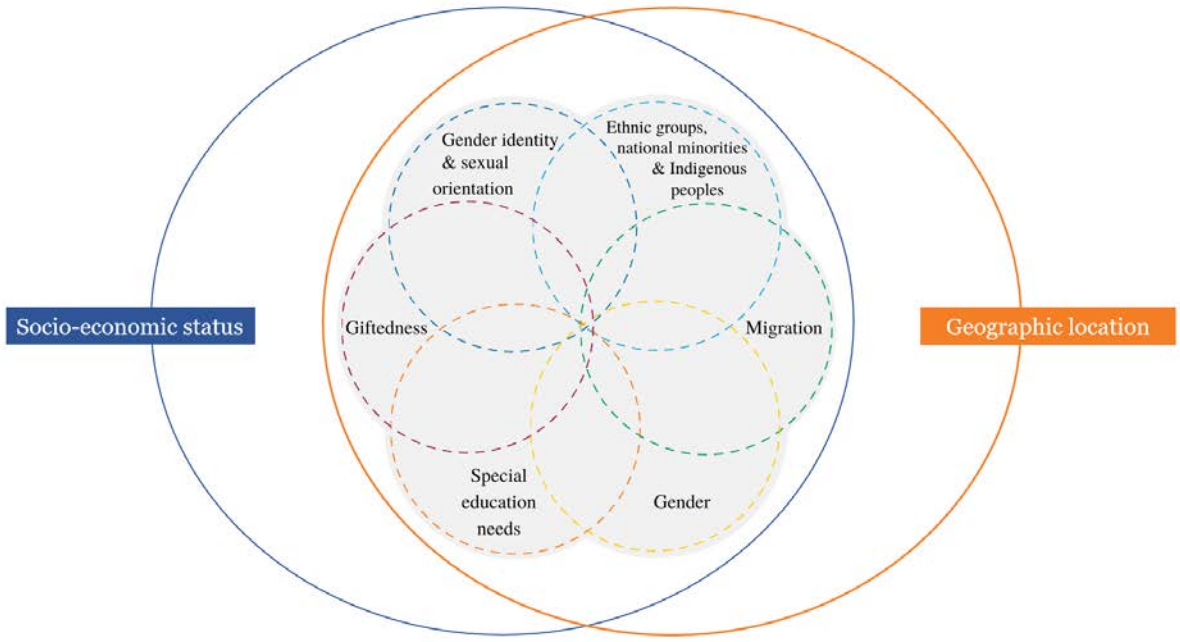
Annex A. The OECD Strength through Diversity project

The OECD Strength through Diversity: Education for Inclusive Societies project is designed to respond to the increasing diversity that characterises education systems and the growing interest in designing and implementing inclusive educational policies at national and international levels. The two overarching policy questions for the project are: (1) *How can education systems support the learning and well-being outcomes of diverse populations and be more inclusive?* (2) *How can education systems support all individuals so that they are able to engage with others in increasingly diverse and complex societies?* To answer these questions, the project has developed a comprehensive analytical framework (Cerna et al., 2021[1]).

The project differentiates between equity and inclusion in education, while recognising that those are intimately related concepts. *Equitable education systems* are those that ensure the achievement of educational potential is not the result of personal and social circumstances, including factors such as gender, ethnic origin, immigrant status, special education needs and giftedness. This assumes the role of education systems in achieving equity is to provide equality of opportunities so each individual reaches his/her education potential. *Inclusive education*, while being closely linked to equity, aims to strengthen the capacity of school systems to reach out to all students by responding to the diversity of their needs and ultimately guaranteeing self-worth and a sense of belonging. It means that education systems must be able to implement mechanisms that foster a proper environment for the well-being of these students, an environment that allows them to express their full potential. It should make them feel safe, achieve the best performance possible and, when applicable, feel in accordance with their own cultural values and representations while being enrolled in mainstream schools. It is the role of policy makers and educators to address these challenges together, guaranteeing the educational achievement of all while strengthening intercultural understanding and social justice.

The project focuses on six dimensions of diversity: migration-induced diversity; ethnic groups, national minorities and Indigenous peoples; special education needs; gender; gender identity and sexual orientation; and giftedness, as well as two overarching factors: socio-economic background and geographical location. It also analyses the intersections between the different dimensions of diversity. This comprehensive framework corresponds to a holistic approach that aims to provide analysis and policy advice on how to achieve equity and inclusion in education.

Figure A.1. Six dimensions of diversity and two overarching factors



Source: Cerna et al. (2021[1]) "Promoting inclusive education for diverse societies: a conceptual framework", OECD Education Working Papers, No. 260, OECD Publishing, Paris, DOI. https://doi.org/10.1787/94ab68c6-en

To this end, the project conducts research and provides recommendations on five key policy areas: 1) governance, 2) resourcing, 3) capacity building, 4) school-level interventions and 5) monitoring and evaluation.

Table A.1. Policy areas to analyse diversity, equity and inclusion in education systems

1. Governing diversity, inclusion and equity in education	2. Resourcing diversity, inclusion and equity in education	3. Developing capacity for managing diversity, inclusion and equity in education	4. Promoting school-level interventions to support diversity, inclusion and equity in education	5. Monitoring and evaluating diversity, inclusion and equity in education
1.A Educational goals and goals for diversity, inclusion and equity [including curriculum policies]	**2.A General distribution** of resources and diversity in education [e.g., funding formulas]	**3.A** Awareness of diversity in education at the system level (among all students; across society)	**4.A Matching resources** within schools to individual student learning needs [allocating teacher resources within schools (e.g. class size); use of space; use of time; ICT resources]	**5.A Monitoring and Evaluation of outcomes** of diversity, inclusion and equity in education at the system level [evaluation of policies and programmes targeted at inclusion and equity; development of indicators; monitoring; reporting on outcomes]
1.B Regulatory framework for diversity and inclusion in education [recognition of diversity and the need for specific	**2.B Targeted distribution** of resources [including matching human resources to	**3.B Recruitment, retention, preparation and evaluation** of school staff [teachers, school	**4.B Learning strategies** to address diversity [student assessment (including diagnostic assessment); individualised	**5.B Evaluating processes** for diversity, inclusion and equity in education at the local and school level [evaluation of schools and

provisions; rights of specific student groups]	schools; programmes to fund provision for specific student groups]	leaders, support staff, including professional development and mentoring]	learning; classroom strategies; use of technology for learning]	local education administration (their role in achieving inclusion and equity)]
1.C Responsibilities for and **administration** of diversity in education [distribution of responsibilities; specific agencies; stakeholder engagement; organisation; supervision]		**3.C Preparation of all students** for diversity in education [including student-student mentoring]	**4.C Non-instructional support** and **services** [e.g. career counselling; personal counselling; medical and therapeutic services]	
1.D Education provision to account for diversity in education [diversity of offerings; learning setting; choice; and selection]			**4.D Engagement with parents** and **communities**	

Source: Cerna et al. (2021[1]) "Promoting inclusive education for diverse societies: a conceptual framework", OECD Education Working Papers, No. 260, OECD Publishing, Paris, DOI. https://doi.org/10.1787/94ab68c6-en

The project seeks to make the most of the OECD's greatest strengths – providing a setting where governments can compare policy experiences, seek answers to common problems, and identify and share good practices. Participating countries prepare a detailed background report and can also opt for a detailed individual review by a team of international experts. The project brings together lessons from all countries in a series of thematic Policy Fora and Meetings of Country Representatives. More information about these events can be found on the project website (https://www.oecd.org/education/strength-through-diversity/). Portugal is actively participating in the project and has opted for a country review of inclusive education. The country review aims at supporting the Portuguese authorities in identifying ways to improve the inclusiveness of the education system.

Following the analytical framework developed by the project, this review examines the five policy areas mentioned above: governance, resourcing, capacity building, school-level interventions, and monitoring and evaluations. The report is structured to highlight all these policy areas which are closely interlinked. Governance and resources are combined in Chapter 2, Capacity building is examined in Chapter 3, and Chapter 4 analyses school-level interventions. Monitoring and evaluation are addressed across Chapter 2-4.

Annex B. Composition of the review team

Emmanuel Acquah is Associate Professor of Education and Minority Research at the Faculty of Education and Welfare Studies, Åbo Akademi University. His primary research interests are in advancing equity in the training and practice of educators of multicultural and multilingual learners. He has related interests in diversity, equity and inclusion. He is the Principal Investigator in the Researching Effective Language-Game Design for Immigrant Integration (REDIT) project and leader of two Erasmus+ projects, Inclusion through mediation and Designing and supporting inclusive practices in higher education. He is also a partner in the Erasmus+ project called School Harnessing Inclusive Facilitator Technology (SHIFT). He has published extensively in the areas of multicultural and multilingual education, adolescents' socio-emotional well-being and children's' social interaction in the classroom. He recently developed a professional development course for Åbo Akademi University staff training called Diversity, Equality and Inclusion and is the director of the International Master's Degree Programme in Education called Teaching and Learning at the Faculty of Education at the Åbo Akademi University.

Mel Ainscow is Emeritus Professor, University of Manchester, Professor of Education, University of Glasgow, and Adjunct Professor at Queensland University of Technology. A long-term consultant to UNESCO, he is internationally recognised as an authority on the promotion of inclusion and equity in education. He recently led the development of a series of policy documents for UNESCO, including its 'Guide for Ensuring Inclusion and Equity in Education'. Mel is also a consultant to an initiative organised by the Organization of American States, supporting national developments in nine Latin American countries. He has recently completed collaborative research projects with networks of schools in Australia and five European countries. Examples of his writing can be found in: *'Struggles for equity in education: the selected works of Mel Ainscow'* (Routledge World Library of Educationalists series). In the Queen's 2012 New Year Honours list, Mel was made a Commander of the British Empire for services to education.

Lucie Cerna is Project Leader for Strength through Diversity in the Directorate for Education and Skills, OECD, Paris and an Associate Fellow at the Centre for Liberal Arts and Social Sciences, Nanyang Technological University Singapore. At the OECD, she has worked on a variety of education topics, including the governance of education, trust, national skills strategies and currently the *Strength through Diversity* project. Prior to coming to the OECD, she was a Lecturer in Politics at Merton College, University of Oxford, an Assistant Professor in Global Challenges (Political Economy) at Leiden University, the Netherlands, and a Research Associate at the Centre on Migration, Policy and Society (COMPAS), Oxford. Lucie has published widely on migration, education and skills issues – her most recent book is *Immigration Policies and the Global Competition for Talent* (Palgrave Macmillan, 2016). She holds a DPhil in Politics from the University of Oxford.

Alexandre Rutigliano is a Consultant for the OECD Strength through Diversity project. Alexandre holds a Bachelor's degree in Cultural Anthropology at Aix-Marseille University and a Master's degree in Human Rights and Humanitarian Affairs at Sciences Po, Paris. He specialises on cultural diversity, children's rights, inclusion and education policy. He previously taught in a primary school in Vietnam and worked in Bolivia with an NGO promoting children's right to participation in the country. Within the project, Alexandre mainly focuses on the inclusion of ethnic groups, national minorities and Indigenous peoples, gifted students and LGBTQI+ (lesbian, gay, bisexual, transgender, queer, intersex and other) students in education systems.

Annex C. Visit programme

1. The review team identified stakeholder groups with whom to meet via consultation with the national co-ordination team, soliciting input from stakeholders during the pre-visit and a desk review of key educational institutions in Portugal. The review team did a pre-visit and a main visit, which were conducted online due to the COVID-19 pandemic context. The school visit was conducted in person in Portugal at a later stage.

2. The review team selected school clusters (public schools) and an individual independent private school to visit during the main visit by creating a stratified sample of schools, randomly selecting schools and then verifying the schools selected through this process captured the desired variation in school qualities. Specifically, the team created regional sub-samples of schools matching specific qualities. The team was interested in observing a range of school characteristics: varying levels of: (i) school cycles; (ii) socio-economic challenge (as measured by proportions of students receiving social support); iii) school cluster sizes; iv) eligibility and non-eligibility for Priority Educational Intervention Territories (TEIP) support; v) private and public governance; (vi) dropout rates; (vii) foreign student population rates; (viii) the existence or absence of school projects to promote equity and inclusion and ix) geographical location (one school in each region and rural/urban settings). The team created sub-samples Lisbon and Tagus region, the North, the Centre, Alentejo and the Algarve for its six school visits. Within each regional sub-sample, the review team specified a desired mix of school characteristics (e.g. low socio-economic status school with strong academic results) and selected a school cluster or individual school at random that matched these desired characteristics. For the six school visits, the randomly selected school cluster or individual school was the one visited.

3. Visits took place in a particular school within a cluster, except from the private independent school that was non-grouped. The review team met with school leaders, teachers, parents and students representing all schools in the cluster.

Online pre-visit programme (Zoom meetings)

Tuesday, 1 December 2020	
10:00 – 11:00	National Association of Special Education Teachers (Associação Nacional de Docentes da Educação Especial, PIN Pró-Inclusão)
Tuesday, 8 December 2020	
11:00 – 12:00	Education National Council (Conselho Nacional da Educação, CNE)
Thursday, 10 December 2020	
10:30 – 11:30	National Commission for the Protection of the Rights and the Protection of Children and Youngsters (*Comissão Nacional de Promoção dos Direitos e Proteção das Crianças e Jovens*, CNPCJ)
Friday, 11 December 2020	
11:00 – 12:00	Association of Entrepreneurs for Social Inclusion (*Empresários para a Inclusão Social*, EPIS)
Tuesday, 16 December 2020	
11:00 – 12:00	UNICEF Portugal
Friday, 18 December 2020	
15:00-16:00	National Programme for the Promotion of School Success (*Programa Nacional de Promoção do Sucesso Escolar*, PNPSE)

16:30 – 17:30	Directorate-General for Schools (Direção-Geral dos Estabelecimentos Escolares, DGEstE)
Monday, 18 January 2021	
10:30 – 11:30	Office of the Assistant Secretary of State and of Education
Tuesday, 19 January 2021	
11:00 – 12:00	High Commissioner for Migrations (*Alto Comissariado para as Migrações*, ACM)
17:00 – 18:00	Inspectorate-General for Education and Science (*Inspeção-Geral da Educação e Ciência*, IGEC)
Wednesday, 20 January 2021	
11:00 – 12:00	Directorate-General for Education (Direção-Geral da Educação)
15:00 -16:00	Independent National Federation of Parents and Guardians in Education (*Confederação Nacional Independente de Pais e Encarregados da Educação*, CNIPE)
Thursday, 21 January 2021	
10:30 – 11:30	National Federation of Teachers (*Federação Nacional dos Professores*, FENPROF)
Friday, 22 January 2021	
10:30 – 11:30	National Federation of Parents' Associations (*Confederação Nacional das Associações de Pais*, CONFAP)
15:00 – 16:00	National Federation of Education (*Federação Nacional da Educação*, FNE)

Online Main Visit programme (Zoom meetings)

Monday, 19 April 2021	
9:30 – 10:15	Education Evaluation Institute (*Instituto de Avaliação Educativa*, I.P., IAVE)
14:00 – 15:00	High Commissioner for Migrations (*Alto Comissariado para as Migrações*, ACM)
Tuesday, 20 April 2021	
9:00 – 9:45	Directorate-General for Education and Science Statistics (*Direção-Geral de Estatísticas da Educação e Ciência*, DGEEC)
14:00 – 15:00	Head of Unit for Curriculum Development Services (*Direção de Serviços de Desenvolvimento Curricular*, DSDC/DGE) – Directorate-General for Education
Wednesday, 21 April 2021	
10:00 – 11:00	Directorate-General for School Administration (*Direção-Geral da Administração Escolar*, DGAE)
14:00 – 15:00	Lisbon Municipality Education Office
Thursday, 22 April 2021	
14:00 – 15:30	Representatives from special education needs associations Disability and Human Rights Observatory (*Observatório da Deficiência e Direitos Humanos*, ODDH) National Association for Early Childhood Intervention (*Associação Nacional para a Intervenção Precoce*, ANIP) Portuguese Association for Asperger Syndrome (*Associação Portuguesa de Síndrome de Asperger*, APSA) Association Parents' Network (*Associação Pais em Rede*, PeR)
Friday, 23 April 2021	
10:00 – 11:30	Research seminar on Inclusive Classrooms: • Professor Research, University of Glasgow • Professor Researcher, University of Porto • Assistant Professor Researcher, University of Lisbon • Researcher, Gent University
12:00 – 13:00	João Costa, Secretary of State Assistant and for Education
14:00 – 15:30	Research seminar on the inclusion of students with an immigrant background: • Professor Researcher, University of Aveiro • Assistant Professor Researcher, University of Coimbra • Assistant Professor Researcher, New Lisbon University
15:45 – 16:45	School Council (*Conselho das Escolas*, CE)
Friday, 30 April 2021	
9:00 – 10:30	Representatives from entities for teacher and school leaders' continuous professional learning:

	• CFAE Beatriz Serpa Branco, Évora, Alentejo • CFAE Porto Ocidental, Porto, Norte • Lisbon University
14:00 – 15:30	School leaders: • *Miranda de Douro School Cluster, Miranda do Douro (*North) • *Santo António* School Sluster, Barreiro (Lisbon) • *Manuel Ferreiro Patrício* school cluster, Évora (Alentejo) • *João de Deus school cluster*, Faro (Algarve)
15:45 – 16:45	Associations of private providers: • Association of Private Schools (*Associação de Estabelecimentos de Ensino Particular*, AEEP) • National Association of Professional Schools (*Associação Nacional de Escolas Profissionais*, ANESPO)
Monday, 3 May 2021	
10:15 – 11:15	Head of Unit for Special Education Services and Socio-educational support (*Direção de Serviços de Educação Especial e Apoios Socioeducativos*, DSEEA/DGE) – Directorate-General for Education
10:15 – 11:45	Teachers: • *Miranda de Douro School Cluster, Miranda do Douro (*North) • *Santo António* School Cluster, Barreiro (Lisbon) • *Manuel Ferreiro Patrício* School Cluster, Évora (Alentejo) • *João de Deus School Cluster*, Faro (Algarve)
13:30 – 15:00	Support staff • *Miranda de Douro School Cluster, Miranda do Douro (*North) • *Santo António* School Cluster, Barreiro (Lisbon) • *Manuel Ferreiro Patrício* School Cluster, Évora (Alentejo) • *João de Deus School Cluster*, Faro (Algarve)
15:15 – 16:15	National Agency for Qualification and VET (*Agência Nacional para a Qualificação e o Ensino Profissional*, ANQEP)
Thursday, 6 May 2021	
10:15 – 11:45	Resource Centres for Inclusion (*Centros de Recursos para a Inclusão*, CRIs): • Lafões Social Solidarity Association (*Associação de Solidaridade Social de Lafõesl*, ASSOL), Lafões, North • Education and Rehabilitation Cooperative for the Inclusive Community of Lisbon (*Cooperativa de Educação e Reabilitação para a Comunidade Inclusiva de Lisboa*, CERCI Lisboa), Lisbon, Lisbon • Association for Cerebral Paralysis of Évora (*Associação de Paralisia Cerebral de Évora*, APCE), Évora, Alentejo • Portuguese Association of Parents and Friends of Citizens with Mental Disability (*Associação Portuguesa de Pais e Amigos do Cidadão Deficente Mental*, APPACDM Castelo Branco), Castelo Branco, Centre
15:45 – 16:45	National Association of Parishes
Friday, 7 May 2021	
9:00 – 10:00	Barreiro Municipality Education Office
13:30 – 14:45	Representatives from Roma associations: • Letras Nómadas
15:00 – 16:30	Ana Sofia Antunes, Secretary of State for the Inclusion of People with Disability

School visits' programme (Portugal)

Tuesday, 28 September 2021	
9:00 – 12:30	*Canelas School Cluster*, Vila Nova de Gaia (North) • School leadership • Teachers and support staff • Students • Community members
14:30 – 18:00	*Coimbra School Cluster*, Coimbra (Centre) • School leadership • Teachers and support staff • Students

	• Community members
Wednesday, 29 September 2021	
9:30 – 12:30	Colégio Pedro Arrupe, Lisbon (Lisbon) • School leadership • Teachers and support staff • Students
14:30 – 18:00	Santo António School Cluster, Barreiro (LVT) • School leadership • Teachers and support staff • Students • Community members
Thursday, 30 September 2021	
9:30 – 12:30	*Manuel Ferreira Patrício* School Cluster, Évora (Alentejo) • School leadership • Teachers and support staff • Students
15:30 – 18:30	*João de Deus* School Cluster, Faro (Algarve) • School leadership • Teachers and support staff • Students

Reviews of National Policies for Education

Review of Inclusive Education in Portugal

The Review of Inclusive Education in Portugal provides, from an international perspective, an independent analysis of major issues regarding diversity, equity and inclusion in education in Portugal, current policy initiatives, and possible future approaches. The report serves three purposes: i) to provide insights and advice to Portuguese education authorities; ii) to help other countries understand the Portuguese approach to inclusive education; and iii) to provide input for comparative analyses of the OECD Strength through Diversity project. The scope for the analysis in this report covers primary (including 1st and 2nd cycle of basic education) and secondary education (including 3rd cycle of basic education and upper secondary). The analysis in the report focuses on the following areas: i) governance and financing of inclusive education; ii) capacity building; iii) school-level interventions and iv) monitoring and evaluation. This report will be of interest in Portugal and other countries looking to improve the equity and inclusion in their education systems.

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