

# 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 Educação 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 identify 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***

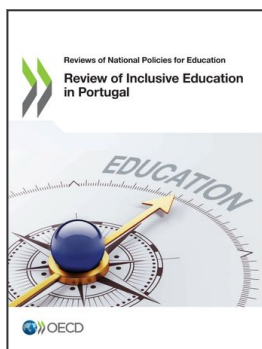
Evidence shows that the Portuguese teaching force has a very small number of teachers with an immigrant background. Portugal should consider taking concrete steps to bring diversity within its teacher force to realise the vision of inclusive education as projected by the 2018 legislation. To break the 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.



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