

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 (DGEESC); José Manuel Passos, President of the IGeFE; Alcina Cardoso, senior officer (IGeFE); Joaquim Santos, Head of the Education Statistics Unit (DGEESC); 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 Calouste 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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