

# COUNTRY BACKGROUND REPORT: PORTUGAL

Review of Inclusive Education



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# **COUNTRY BACKGROUND REPORT: PORTUGAL**

## **Review of Inclusive Education**

## **Technical Sheet**

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## List of acronyms

<b>A3ES</b>	<i>Agência de Avaliação e Acreditação do Ensino Superior</i> – Agency for Assessment and Accreditation of Higher Education
<b>ACM</b>	<i>Alto Comissariado para as Migrações</i> – High Commissioner for Migrations
<b>AE</b>	<i>Aprendizagens Essenciais</i> – Essential Learning
<b>AEC</b>	<i>Atividades Extracurriculares</i> – Extra-curricular activities
<b>AFC</b>	<i>Autonomia e Flexibilidade Curricular</i> – Curriculum Autonomy and Flexibility
<b>ANQEP</b>	<i>Agência Nacional para a Qualificação e o Ensino Profissional</i> – National Agency for Qualification and Vocational Education and Training
<b>ASE</b>	<i>Ação Social Escolar</i> – School Social Assistance
<b>ATE</b>	<i>Apoio Tutorial Específico</i> – Specific Tutorial Support
<b>CEF</b>	<i>Cursos de Educação e Formação</i> – Education and Training Courses
<b>CEFR</b>	Common European Framework of Reference for Languages
<b>CERCI</b>	<i>Cooperativa Educação Reabilitação de Cidadãos com Incapacidades</i> – Education and Rehabilitation Cooperative for Citizens with Disabilities
<b>CFAE</b>	<i>Centro de Formação de Associação de Escolas</i> – School Association Training Centres
<b>CH</b>	<i>Crédito Horário</i> – Credit Hours
<b>CLE</b>	<i>Conselho Local de Educação</i> – Local Education Council
<b>CME</b>	<i>Conselho Municipal de Educação</i> – Municipal Council for Education
<b>CPCJ</b>	<i>Comissões de Proteção de Crianças e Jovens</i> – Commissions for the Protection of Children and Youngsters
<b>CRI</b>	<i>Centro de Recursos para a Inclusão</i> – Resource Centre for Inclusion
<b>CRPD</b>	Convention on the Rights of Persons with Disabilities
<b>CRT</b>	Culturally Responsive Teaching
<b>CRTIC</b>	<i>Centro de Recursos de Tecnologias da Informação e Comunicação para a Educação Especial</i> – Resource Centre for Information and Communication Technology for Special Education
<b>CSP</b>	Cultural School Project
<b>DGAE</b>	<i>Direção-Geral da Administração Escolar</i> – Directorate-General for School Administration
<b>DGE</b>	<i>Direção-Geral da Educação</i> – Directorate-General for Education
<b>DGEEC</b>	<i>Direção-Geral de Estatísticas da Educação e Ciência</i> – Directorate-General for Education and Science Statistics
<b>DGEstE</b>	<i>Direção-Geral dos Estabelecimentos Escolares</i> – Directorate-General for Schools
<b>ECTS</b>	European Credits Transfer and Accumulation System
<b>ED</b>	<i>Ensino a Distância</i> – Distance Learning
<b>EFA</b>	<i>Educação e Formação de Adultos</i> – Adult Education and Training
<b>EMAEI</b>	<i>Equipa Multidisciplinar de Apoio à Educação Inclusiva</i> - Multidisciplinary Team for Inclusive Education

<b>ENEC</b>	<i>Estratégia Nacional da Educação para a Cidadania</i> – National Strategy for Citizenship Education
<b>ENICC</b>	<i>Estratégia Nacional de Integração das Comunidades Ciganas</i> – National Strategy for the Integration of Roma Communities
<b>ENIND</b>	<i>Estratégia Nacional para a Igualdade e a Não Discriminação</i> – National Strategy for Equality and Non-Discrimination
<b>ESF</b>	European Social Fund
<b>HEI</b>	Higher Education Institution
<b>ICT</b>	Information and Communication Technology
<b>IGEC</b>	<i>Inspeção-Geral da Educação e Ciência</i> – Inspectorate-General for Education and Science
<b>IGeFE</b>	<i>Instituto de Gestão Financeira da Educação</i> - Institute for the Management of Educational Finance
<b>ITE</b>	Initial Teacher Education
<b>MENA</b>	<i>Menores Estrangeiros Não Acompanhados</i> – Unaccompanied Foreign Minors
<b>MCTES</b>	<i>Ministério da Ciência, Tecnologia e Ensino Superior</i> – Ministry of Science, Technology and Higher Education
<b>MOOC</b>	Massive Open Online Courses
<b>MoE</b>	Ministry of Education
<b>MS</b>	<i>Ministério da Saude</i> – Ministry of Health
<b>MTSSS</b>	<i>Ministério do Trabalho, Solidariedade e Segurança Social</i> – Ministry of Work, Solidarity and Social Security
<b>PAOIEC</b>	<i>Plano de ação de combate a discriminação em razão de orientação sexual, Identidade e Expressão de género, e Características sexuais</i> – Action plan to combat discrimination based on sexual orientation, gender Identity and gender expression, and sexual characteristics
<b>PAE</b>	<i>Plano de Ação Estratégico</i> – Strategic Action Plan
<b>PAP</b>	Professional Aptitude Test
<b>PCA</b>	<i>Percurso Curricular Alternativo</i> – Curriculum Alternative Pathway
<b>PDPSC</b>	<i>Plano de Desenvolvimento Pessoal, Social e Comunitário</i> – Personal, Social and Community Development Plan
<b>PE</b>	<i>Programa Escolhas</i> – Choices Programme
<b>PEI</b>	<i>Programa Educativo Individual</i> - Individual Education Programme
<b>PIEF</b>	<i>Programa Integrado de Educação e Formação</i> – Integrated Education and Training Programme
<b>PIICIE</b>	<i>Plano Integrado e Inovador de Combate ao Insucesso</i> – Integrated and Innovative Programme to Combat School Failure
<b>PIT</b>	<i>Plano Individual de Transição</i> – Individual Transition Plan
<b>PLA</b>	<i>Português Língua de Acolhimento</i> – Portuguese as a Host Language
<b>PLNM (PL2)</b>	<i>Português Língua Não Materna</i> – Portuguese as a Second Language
<b>PNA</b>	<i>Plano Nacional das Artes</i> – National Plan for Arts

<b>PNPSE</b>	<i>Programa Nacional de Promoção do Sucesso Escolar</i> – National Programme for the Promotion of School Success
<b>POCH</b>	<i>Programa Operacional Capital Humano</i> – Human Capital Operational Programme
<b>PSL</b>	Portuguese Sign Language
<b>REEI</b>	<i>Rede de Escolas para a Educação Intercultural</i> – Network of Schools for Intercultural Education
<b>SGEC</b>	<i>Secretaria-Geral da Educação e Ciência</i> - General Secretariat for Education and Science
<b>SEN</b>	Special Education Needs
<b>STP</b>	Supervised Teaching Practice
<b>TEIP</b>	<i>Território Educativo de Intervenção Prioritária</i> – Priority Intervention Educational Territories
<b>UFCD</b>	<i>Unidades de Formação de Curta Duração</i> – Short Term Training Units
<b>UNHCR</b>	United Nations High Commissioner for Refugees

# Chapter 1. Governing diversity, inclusion and equity in education

## 1.1. Educational agenda

### **1.1.1. Equity and inclusion of diversity in educational goals**

1. Over the last three years, there have been major changes in education in Portugal in order to improve the quality of learning and of school for all students.
2. Equity and inclusion in educational policy goals are central, paying particular attention to students from diverse backgrounds who are more at risk of increased vulnerability. Educational success for all within compulsory schooling is a national priority, especially in the current COVID-19 pandemic situation.
3. Leaving no one behind implies however a compliance of educational measures and programmes, which must support schools and their teachers to achieve this goal. Equity and inclusion in education are the main pillars of all Portuguese recent education policies. Education is a basic human right and not the privilege of some. Measures within the education system are designed and implemented at all levels - national, regional and local (school) - so that all students have access to good learning conditions. Recent legislation on Inclusive education requires that the provision of support for all students be determined, managed and provided at the regular school level, with local multidisciplinary teams responsible for determining what support is necessary to ensure all students (regardless of economic, cultural, linguistic, ethnic backgrounds and ability) have access and the means to participate effectively in education, with a view to their full inclusion in society.
4. The promotion of inclusion and equity is not simply a technical or organisational change, it also requires an effective strategy for implementation. While the whole education system is going towards an inclusive approach, each level has its specific priorities.

#### *National level:*

- The education system is designed for all learners, regardless of their situations and backgrounds, with a complex and comprehensive set of support measures for schools and learners. It promotes inclusion for all. The creation of a culture of inclusion requires a shared commitment amongst staff at the national, regional, and school level.
- Inclusion and equity principles inform national policy measures within the education system particularly those that deal with the curriculum, assessment, school evaluation, continuing teacher professional development and budgets.
- National action plans and programmes support diversity amongst all learners, especially those that are particularly vulnerable and at risk of dropout such as learners with special education needs, those from ethnic minorities (Roma communities) and with a migrant background and from non-Portuguese speaking families.
- The Ministry of Education (MoE) adopts a comprehensive political openness around inclusive education, expressed in the different programmes and measures made available to schools.
- The political approach translated into legislation is more and more orientated towards the inclusive education model, adopting inclusion in a broad sense, as a cornerstone of educational policy and a key responsibility of the public education system. There is the possibility for schools to have more than 25% autonomy in managing the curriculum to respond to the needs and characteristics of their students.



- There is political openness to maintain and even increase the levels of funding for inclusive education in recent years, despite the financial constraints on the country and the education sector. The main objective is to improve inclusive school promoting better and meaningful learning for all students, for the exercise of active and informed citizenship considering diversity as a value.
- The School Social Assistance (*Ação Social Escolar, ASE*) is a national measure for all schools that aims to prevent social exclusion and school dropout among students from disadvantaged families, which might include, though not always, families from ethnic minorities (especially Roma people), students from non-Portuguese speaking immigrant families, Portuguese-speaking people of African descent and from families with low income (more info in section 1.2.2).
- There is an increase in the professional education network.
- There is an effort to have a greater diversity of choice of professional education courses as well as to open more courses.
- The increasing trend towards autonomy has been accompanied by new governance and accountability mechanisms.
- Various national programmes have been implemented to support diversity, equity and inclusion. The main ones are (1) the National Programme for School Success Promotion (*Programa Nacional de Promoção do Sucesso Escolar, PNPSE*) in 2016, which supports the implementation of education policies by preventing school failure and the promotion of equity and quality in education; and (2) the Priority Intervention Educational Territories Programme (*Territórios Educativos de Intervenção Prioritária, TEIP*) (see 1.2.2) implemented in 136 school clusters and schools that are located in economically and socially disadvantaged territories, characterised by higher than average rates of poverty, social exclusion, violence, indiscipline, dropout and school failure.

### *Regional level*

- The Directorate-General for Schools (*Direção-Geral dos Estabelecimentos Escolares, DGEstE*) 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. Areas such as the allocation of human resources (teachers, specialised support staff, operational assistants) are based on the identification of needs by schools, needs that are analysed by regional services. The same is true, for example, with the allocation of transport for students with mobility difficulties. In all situations, a careful analysis is carried out, which involves a reflection work with schools on the way in which existing human resources are being managed. An analysis/reflection is carried out with schools to assess the need for the requested resources and how they are allocated. Each region has its own specificities that are taken into account in the analysis and even in the definition of positive discrimination measures with a potential impact on the educational path of children/young people.
- The PNPSE has been privileging proximity action with local authorities and inter-municipal entities, with which it implements various programmes to combat school failure, such as the PIICIE - Integrated and Innovative Programme to Combat School Failure (PIICIE) (see 3.2.3).
- Formative Offer Portal:  
One of the probable causes of failure and dropout in the first year of secondary education is the lack of consistency in the choice of the course, resulting, in many situations, from the lack or dispersion of information about the overall educational and formative offer. In this context, the need arose for the creation of the Formative Offer Portal (<https://www.ofertaformativa.gov.pt/>), a national technological platform developed by the General Directorate on Education and Science Statistics (DGEEC), in partnership with the Directorate-General for Education (DGE) and the National Agency for Qualification and Professional Education (ANQEP). The main objective of this resource is to make available in a single place, in an integrated manner and with a uniform presentation structure updated information on the overall educational and formative offer

existing at the different levels, cycles and modalities of education and training, as well as other related information. Through the Formative Offer Portugal, comprehensive information is provided to young people and parent on all available educational and training offers, not only in their school, but in the territory in which they are located, providing all the information about choice options that meet the profile of each student. This platform can be consulted by individual students or with the support of teachers and professionals linked to the school and professional guidance. The Portal is an efficient instrument to inform and guide all students.

- Management of the network of courses with dual certification:

Currently, education and training systems are struggling with the urgent need to respond to the faster, complex, and unpredictable dynamics of the labour market and socio-economic development, and also with the need to meet the expectations and aspirations of the new generations. The mechanisms for anticipating qualifications and competences, which are being developed and consolidated everywhere, have gained increased importance in the planning of the educational and formative offer, as they give to the different stakeholders greater capacity and speed in analysis and decision-making.

Law No. 82-A/2014 of December 31, which approved the Great Options of the Plan for 2015, reinforced the importance and need for the country to have a Qualification Needs Forecasting System (*Sistema de Antecipação de Necessidades de Qualificações*, SANQ). The National Agency for Qualification and Vocational Education, I.P. (ANQEP, I.P.) was established as a body with attributions in the field of coordination and regulation of the dual certification education and vocational training offers. It also manages the National Qualifications Catalogue to sustain its relevance through updated knowledge of the dynamics of supply and demand for qualifications (in the short and medium term) and the evolution of education and training that rank the offers.

The definition and development of a model for anticipating qualification needs is an important step towards the consolidation of a more informed and sustained intervention. As part of the planning process of the network of dual certification offers for young people (Professional Courses (CP) and Education and Training Courses (CEF), the SANQ has allowed the identification of priority professional areas and exits at the national and regional levels. Based on the results of the SANQ, ANQEP, I.P. annually defines criteria for ordering the network of dual certification offers for young people (CP and CEF) that support the planning and concertation process of these networks.

Since the launch of SANQ, there has been an observable increase in the participation of local structures, as the intermunicipal communities (CIM) and the metropolitan areas (AM): currently, 20 CIM/AM (out of a total of 23) participate in the construction of the SANQ, and in the year of the launch of SANQ (2015) only four CIM/AM have done so.

#### *Local (school) level:*

- Clear progress is being made with regards to personalisation, which implies giving specific individual attention to learners and closely working with them. There is a common assumption that there is not one single model of an inclusive school. There is currently a strong development-orientated political commitment, which aims to reduce educational inequities and promote quality education and learning for all.
- There is a growing intervention of municipalities in the field of education. The government has made significant effort to deepen the process of decentralisation of the education system (see 1.3).
- Within the new political orientation developed at the system levels, schools have more autonomy. Autonomy and Curriculum Flexibility, as well as inclusion are key concepts and principles in the design and implementation of curricula and educational activities. Curriculum reference documents such as *The Students' Profile by the End of Compulsory Schooling* and other

documents such as *Essential Learning* guarantee coherence within the education system. *The Students' Profile* is the reference document for the organisation of the entire education system, it respects the inclusive and multiple character of school, ensuring that, regardless of the school pathways, all knowledge is guided by explicit principles, values and vision, resulting from social consensus.

5. As a result of the COVID-19 pandemic, there was a need to reorganise the school and continue the teaching and learning process. Ensuring educational success for all within compulsory education and maintaining the priority of “not leaving any students behind” have remained in this new context.

6. Inclusion is a process aimed at responding to the diversity of students through increased participation of all in learning and in the life of the school community. It is sought to ensure that the “Students' Profile by the End of Compulsory Schooling” (see 1.1.2) is reached by all, even if it is through differentiated learning paths that allow each student to progress in the curriculum in a way that ensures their educational success.

7. To ensure quality learning for all students, guaranteeing that everyone is respected and valued and fully participate in society, presupposes:

- A focus of schools and teachers on the needs of the learners, not on the problems that may underpin such needs or on classifying or categorising them. This suggests avoiding labelling.
- All learners in mainstream schools having increasing levels of participation and educational outcomes. A growing focus on classrooms as the normal/main place for education in which to identify and solve problems.
- A friendly learning environment, both in terms of pedagogy and human relationships, promoting well-being and being attractive and interesting for learners.
- Continuous progress in reducing retention and dropout rates and ensuring that all students remain in education throughout the 12 years of compulsory schooling. Attention must be given to the correlation between school failure and socio-economic conditions and qualifications of parents (namely mothers).
- A common understanding of inclusive education at all levels, for all key stakeholders, and the design of flexible responses. There is a large investment in capacity building for inclusion through training for school leaders, members of the multidisciplinary teams to support inclusive education, teachers, parents, and specialised support staff.
- Enhancing co-ordination, convergence and coherence between different programmes, measures and funding agents improving the effectiveness of support measures and funds allocated.
- More co-ordinated, collaborative, and integrated cross-sectoral services.
- Developing reporting and monitoring mechanisms that explicitly identify the enabling effect of support provided to learners as well as to stakeholders. The Ministry of Education of Portugal is developing a project, with the support of DG Reform, EU Commission, implemented by the European Agency for Special Needs and Inclusive Education, to design a monitoring system that will allow for a preliminary assessment of the effectiveness of the Decree- Law on inclusive education (See Chapter 5. ). A new model of schools' external assessment is also being implemented.
- Promoting accountability at the national, municipal, and school levels.

8. To summarise, there is a clear commitment to the development of an inclusive education system in Portugal, supporting both performance and equality for all learners. This is evidenced by the development of support measures and programmes and funds allocated, as well as by the political orientation and aims currently being implemented.

9. There are also clear challenges, mainly related to weaknesses in governance, monitoring and accountability mechanisms, which prevent the development of well-co-ordinated policies and of a streamlined system.

**10.** Regarding students from a migrant background, the most important challenges faced by Portugal are:

- The fact that students and their families do not master Portuguese as a mediation language which allows communication to be established.
- Late arrivals in the Portuguese education system throughout the school year.

**11.** In the current diverse multicultural context of Portuguese schools, measures to promote their sense of belonging to the community without losing their cultural identity diversity must be seen as an opportunity and source of learning for all, respecting the multicultural nature of society. In addition to integration into the education system and access to the school curriculum, achieving educational success is a major challenge.

**12.** Regarding students in need of additional support, the main significant challenges are the following:

- The difficulty of professionals in moving away from the traditional special education approach (within-child focus) to an inclusive approach that respond to all students (child-and-classroom/school and family, community, society focus).
- Embed inclusion as a principle of curriculum design and implementation, focusing on removing barriers around the content and concepts, the sense of learning purpose and motivation, the pedagogies and assessment, by offering more engaging, practical and demanding learning experiences for all students.
- Changing from a traditional curriculum structure one-size-fits-all to a personalised curriculum approach based on a differentiated, non-linear learning trajectory model while retaining quality and coherence.
- The importance that the professionals assign to a *one-to-one* intervention focused on rehabilitative therapies instead of the implementation of adapted differentiated pedagogies within the classroom.

**13.** Overall, key current challenges are:

- The support structures need to develop new expertise, aligned with the inclusive way of understanding supports: focus on the environment factors, on how to provide and organise the support addressed to the whole school (school wide approach) and to the class as a whole. This requires new knowledge and expertise both in the field of evaluation (of the factors shaping the school and community context; observation of interaction in the classroom, attitudes, etc.) and of teaching in diverse classrooms. It implies planning lessons effectively, using different teaching/pedagogical strategies and adapting the curriculum to fit each student's ability and background (for example following the universal design for learning).
- Raising awareness on the importance of promoting a whole-school approach to foster a diverse and inclusive school culture in order to involve students, teachers and other school staff, engage families and build effective collaboration between schools and communities.
- The need to build support networks within and between schools, and between the school and its community to encourage different structures of support to collaborate and support the inclusion of all students. In other words, there is a strong need to increase collaborative work among all stakeholders.
- The perception, and often the demand, for more resources at the sub-national levels, without substantive evaluation and without being associated to an intervention strategy.
- In this regard, there are some perceived key aspects to consider:
  - What changes have been identified in relation to inclusive practices?
  - How have parents' and students' rights changed?
  - Which school strategies and programmes have been successful in addressing inequalities and exclusion at school level?

- How can schools reduce the gap between the inclusive principles adopted, including the new curriculum framework, on the one hand and classroom practices on the other?
- Are the resources and support allocated to the school being used to promote the inclusion and success of all students?
- How are schools monitoring their own inclusive practices in order to identify their strengths and weaknesses and improve their work?

### **1.1.2. Student learning objectives (Curriculum)**

**14.** According to the Constitution of the Portuguese Republic, the State promotes the democratisation of education and the other conditions for education, carried out through the school and other formative means, to contribute to equal opportunities, the the overcoming of economic, social and cultural inequalities, the development of personality and a spirit of tolerance, mutual understanding, solidarity and responsibility, social progress and democratic participation in collective life (no. 2 of the article no. 73.º).

**15.** The 21st Constitutional Government's programme gives priority to an education policy that focuses on people, guaranteeing equal access to public education, promoting educational success and equal opportunities.

**16.** The Ministry of Education of Portugal adopted a set of actions that constitute the framework for the construction of a curriculum for the 21st century.

**17.** Aligned with this principle, in Portugal, the national curriculum for the basic and secondary education has recently improved, according to major guiding documents, which are instruments of central relevance within a context of a reinforced legislated autonomy and flexibility granted to the schools: (1) the Students' Profile by the End of Compulsory Schooling (2017) and (2) the National Strategy for Citizenship Education (2017) and Essential Learning (2018)

**18.** The curriculum does not refer to "migration-induced diversity" or to students with specific education needs in particular. The school aims to be inclusive, promoting better learning and success for all.

#### *Students' Profile by the End of Compulsory Schooling (Students' Profile)*

**19.** The national curriculum consists of the Essential Learning per subject and year of schooling. All these competences are aligned with the Students' Profile competence areas, principles, and vision, namely inclusion, citizenship and participation and interpersonal relations. The 2017 Students' Profile by the End of Compulsory Schooling (*Perfil dos Alunos à Saída da Escolaridade Obrigatória*, Legislative Order No. 6478/2017, 26th June)<sup>1</sup> 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.

**20.** Aligned with the Students' Profile and to address curriculum overload and foster deeper learning, the MoE, collaboratively with teachers' associations, defined the Essential Learning (Aprendizagens

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<sup>1</sup> See: [https://www.dge.mec.pt/sites/default/files/Curriculo/Projeto\\_Autonomia\\_e\\_Flexibilidade/perfil\\_dos\\_alunos.pdf](https://www.dge.mec.pt/sites/default/files/Curriculo/Projeto_Autonomia_e_Flexibilidade/perfil_dos_alunos.pdf) (accessed on 9 December 2021).

Essenciais - AE)<sup>2</sup> per subject and year of schooling, for primary and secondary education (general courses) which were ratified in 2018 (Legislative Order No. 6944-A/2018, 19th July<sup>3</sup> and Legislative Order No. 8476-A/2018, 31st August<sup>4</sup>). In 2020, AEWere extended and homologated to Vocational Courses and Artistic Specialised Courses (Legislative Order No. 7414/2020, of the 24th July and Legislative Order No. 7415/2020, of the 24th July). When there was no professional teacher association constituted, this was undertaken by scientific societies and authors, allowing for the development of meaningful learning. This underpins not only what is foreseen in the curriculum documents, but also more complex skills. This facilitates interdisciplinary work, a variety of 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 autonomously.

**21.** This document is the framework for curriculum development and for the organisation of school activities. Consequently, it assumes a necessarily broad, transversal and recursive nature. 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.

**22.** The values outlined in the Students' Profile's conceptual framework 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. The Students' Profile therefore leads to a school education thanks to which the students of this global generation can build a humanistic-based scientific and artistic culture. It aims to help students (1) mobilising values and skills that allow them to act upon the life and history of individuals and societies; (2) making free and informed decisions about natural, social and ethical issues; and (3) carrying out a civic, active, conscious and responsible participation.<sup>5</sup>

**23.** Besides, the national curriculum is to be implemented by means of specific methodologies respecting each student's learning pace and individuality. With the main priority of providing a quality education for all and being aware that there are schools that have managed to counter the main predictors of school failure by adopting solutions aligned with the contexts and to their students' specific needs, it is crucial to consider the curriculum as a tool that schools can manage and develop, so that all students can achieve the competences outlined in the Students' Profile by the End of Compulsory Schooling.

**24.** As such, it is essential that schools and teachers make the main curriculum and pedagogy decisions. They for instance can have greater flexibility in curriculum management, which aims 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, of the 6<sup>th</sup> July, schools are provided with up to 25 % of curriculum autonomy so as to meet their specific needs by fostering pedagogical differentiation in the classroom, interdisciplinary work, project-based methodologies, creating new subjects, 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.

**25.** Alongside, the MoE issued Decree-Law No. 54/2018, of 6<sup>th</sup> July, which points out the need of each school to recognise the added value of the diversity of its students, finding ways to deal with that difference, adjusting the teaching processes to the individual characteristics and conditions of each

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<sup>2</sup> See: <http://www.dge.mec.pt/aprendizagens-essenciais-ensino-basico> (accessed on 9 December 2021).

<sup>3</sup> See: <https://dre.pt/application/file/a/115742277> (accessed on 9 December 2021).

<sup>4</sup> See: [http://www.dge.mec.pt/sites/default/files/Curriculo/ESecundario/despacho\\_ae\\_secundario.pdf](http://www.dge.mec.pt/sites/default/files/Curriculo/ESecundario/despacho_ae_secundario.pdf) (accessed on 9 December 2021).

<sup>5</sup> See this 2017 Report from the MoE :

[https://dge.mec.pt/sites/default/files/Curriculo/Projeto\\_Autonomia\\_e\\_Flexibilidade/perfil\\_dos\\_alunos.pdf](https://dge.mec.pt/sites/default/files/Curriculo/Projeto_Autonomia_e_Flexibilidade/perfil_dos_alunos.pdf) (accessed on 10 January 2022).

student, mobilising the means at its disposal so that everyone learns and participates in the life of the educational community. This Decree-Law provides schools with the necessary autonomy to meet each student's needs by implementing different measures (universal, selective or additional measures). In this vein, and following up on the Decree-Law 55, there was also the issuing of Ministerial Implementing Order no. 181/2019, of the 11<sup>th</sup> June, granting some schools more than 25% of curriculum management by creating and/ or blending subjects and making classes arrangements, active methodologies and/or different schools' calendar organisation within a context sensitive approach.

### *National Strategy for Citizenship Education (ENEC)*

**26.** The 2017 *National Strategy for Citizenship Education (Estratégia Nacional da Educação para a Cidadania, ENEC)* was set up to support children and young people to acquire citizenship skills and knowledge throughout their compulsory school education. ENEC was developed in accordance with the Students' Profile.

**27.** In line with the ENEC, the national curriculum comprises the subject Citizenship and Development, which, in its syllabus, fosters and reflects the principles of diversity, inclusion and equity along with interdisciplinary activities.

**28.** The aim of this strategy is to help students develop and participate actively in projects that promote fairer and more inclusive societies within the context of the value of democracy and democratic institutions, the respect and defence of human rights, as well as respect for diversity and gender equality, environmental sustainability and health education. Enshrined in the Comprehensive Law of the Education System (Law No. 46/86, of the 14th October)<sup>6</sup> and the *Students' Profile*, the inclusion of this area in the curriculum is justified by the recognition of schools' responsibility to provide adequate preparation for active and informed citizenship, as well as appropriate education to achieve the *Sustainable Development Goals*.

## **1.2. Regulatory framework for diversity and inclusion in education**

**29.** In Portugal there is a universal right to primary and secondary education for all children irrespective of their legal situation, ethnic group or any other characteristic. Educational policy measures defined at the central level are applied in a non-discriminatory way. Indeed, the Constitution of the Portuguese Republic establishes that "everyone has the right to education and culture" (Article 73, no. 1). In Portugal, schooling is compulsory for all children and young people between 6 and 18 years old. Article 74th claims that "1. Everyone has the right to education, with the guarantee of the right to equal opportunities in access to and success in schooling".

**30.** All the central educational measures are based on principles such as inclusion, equity and diversity. The legal framework for inclusive education establishes the principles and regulations that ensure inclusion as a process which responds to the diversity of needs and capabilities of each and every student through increased participation in the learning processes and educational community. The Students' Profile and other main educational documents on curricular flexibility and autonomy and inclusive education are in line with the same principles.

**31.** Educational policies that guarantee equal access to the public school, promoting educational success, have been united in a set of guiding principles. These principles are highlighted in the various diplomas on educational policies and guiding documents of the MoE (Decree-Law No. 54/2018 and No.

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<sup>6</sup> See: <https://dre.pt/web/guest/legislacao-consolidada/-/lc/70328402/201707281529/70486656/diploma/indice> (accessed on 9 December 2021)

55/2018, of the 6<sup>th</sup> July; Students' Profile; ENEC) and also in the handbook to support inclusive practice.<sup>7</sup> In a nutshell, the guiding principles are:

- Fostering the improvement of teaching and learning quality.
- Guaranteeing an inclusive school, which fosters equality and non-discrimination, whose diversity, flexibility, innovation and personalisation meet the students' 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.
- Considering diversity as an asset to improve the education system. This includes valuing the community and the students' linguistic diversity, as an expression of individual and collective identity.
- Promoting citizenship and personal, interpersonal, and social intervention development education throughout compulsory schooling.

### **1.2.1. Legal framework for equity and inclusion**

**32.** As mentioned above, Portugal has undertaken major changes to reform its education system. While the country started to focus on inclusion in education already in the 1990s, it was for long almost exclusively through the lens of the inclusion of students with SEN. Recent changes have broadened this approach and the scope of inclusive education. The latter is now seen as a process in which the education system has to adapt to the needs of all students (see section 1.1) and all students should as much as possible attend mainstream education. According to this approach, a new set of legal instruments has been developed, starting in 2018. Some of the main legal documents are the following:

- Decree-Law No. 54/2018, 6th July<sup>8</sup> – Establishes the principles and norms that guarantee inclusion, understood as a process that aims to respond to the diverse needs of all students. The Decree-Law covers all learners.
- Decree-Law No. 55/2018, 6th July<sup>9</sup> - Establishes the curriculum for basic and secondary education and the guiding principles for assessing learning.
- Legislative Order No. 10-A/2018, 19th June<sup>10</sup> and Legislative Order No. 16/2019,<sup>11</sup> 4<sup>th</sup> June - Establishes the criteria for the constitution of groups and classes and the period of operation of education and teaching establishments within the scope of compulsory education.
- Legislative Order No. 3-A/2020, 5th March<sup>12</sup> - Regulation of the National Examination Jury and Regulation of External Assessment Tests and Tests of Equivalence to the Attendance of Basic and Secondary Education.
- Legislative Order No. 5/2020, 21st April<sup>13</sup> - Establishes the registration and renewal procedures and the rules to be observed in the distribution of children and students in each school and classroom.

#### *The law for Inclusive Education (Decree-Law No. 54/2018, 6th July)*

**33.** Following a rigorous evaluation process of the past ten years' policies and practices and a broad national consultation, a new decree-law on inclusive education entered into force in 2018. The legal framework for inclusive education, set out by Decree-Law No. 54/2018, 6th July, with the amendments

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<sup>7</sup> See: [https://www.dge.mec.pt/sites/default/files/EEspecial/manual\\_de\\_apoio\\_a\\_pratica.pdf](https://www.dge.mec.pt/sites/default/files/EEspecial/manual_de_apoio_a_pratica.pdf) (accessed on 9 December 2021).

<sup>8</sup> See: <https://dre.pt/application/file/a/115648907> (accessed on 9 December 2021).

<sup>9</sup> See: <https://dre.pt/application/conteudo/115652962> (accessed on 9 December 2021).

<sup>10</sup> See : <https://dre.tretas.org/dre/3375132/despacho-normativo-10-A-2018-de-19-de-junho> (accessed on 9 December 2021).

<sup>11</sup> See: <https://dre.pt/dre/detalhe/despacho-normativo/16-2019-122497599> (accessed on 9 December 2021).

<sup>12</sup> See: <https://dre.tretas.org/dre/4029632/despacho-normativo-3-A-2020-de-5-de-marco> (accessed on 9 December 2021).

<sup>13</sup> See: <https://dre.pt/dre/detalhe/despacho-normativo/3-a-2020-129970449> (accessed on 9 December 2021).



introduced by the Law No. 116/2019, 13th September, 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.

**34.** Equity is one of the principles of the inclusive education law. According to the law, “equity” is the guarantee that all students have access to the necessary support to realise their learning and development potential and “inclusion” is the right of all children and pupils to access and participate, fully and effectively in the same educational contexts. Schools shall respond to the needs of each child and student, valuing diversity and promoting equity and non-discrimination in accessing the curriculum and the different levels of education.

**35.** The new law on inclusive education reflects a move away from the rationale that it is necessary to categorise to intervene. Rather, it seeks to ensure that all learners reach the Students’ Profile, which can be done through reasonable accommodations, i.e., differentiated learning paths that allow each learner to progress in the curriculum in a way that ensures their educational success. Therefore, according to the new law on inclusive education, there is no need to have a formal diagnosis to receive specific supports.

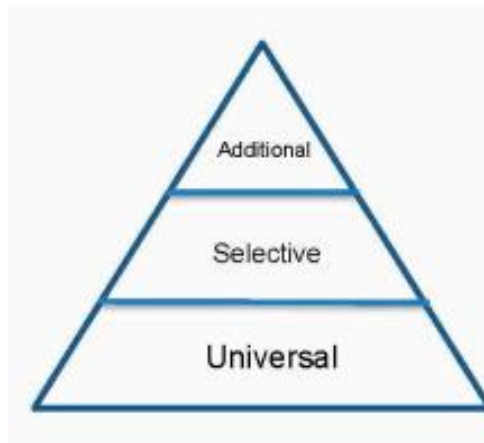
**36.** Decree-Law No. 54/2018 abandons categorisation systems for learners, including the ‘categories associated to special educational needs. As such, it removes segregation and discrimination based on diagnosis or clinical labels, and special legislation frameworks for learners with special needs from the educational system. Moreover, it abandons the restricted concept of “support measures for learners with special educational needs”. It takes a broader view, implying a whole school approach, which considers multiple dimensions and the interactions between them.

**37.** Every learner 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 distinguished between three types of measures to support students:

(i) Universal Measures (*Medidas Universais*): made available by the school for all students and which promote participation and the improvement of learning;

(ii) Selective Measures (*Medidas Seletivas*): aim at supporting students’ more specific needs that are not addressed by universal measures;

(iii) Additional Measures (*Medidas Adicionais*): aim at responding to persistent needs related to communication, integration, cognition or learning that require specialised resources to support inclusion in education.



**38.** Overall, the above-mentioned Decree-Law:

- abandons a categorisation system, including the “special educational needs” category;<sup>14</sup>
- abandons the traditional model of special legislation for special students;
- establishes a continuum of provision for all students according to the universal design for learning and the multi-level approach to access the curriculum;
- focuses on educational responses rather than student categories based on clinical labels or other characteristics, recognising that every student can learn; and
- foresees the mobilisation of resources (as a complement, whenever necessary and appropriate) in the areas of health, employment, vocational training and social security”.<sup>15</sup>
  - provides an inclusive education framework that targets all students.

**39.** The 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 to encourage more multilevel and multidisciplinary interventions, a demonstrated commitment to inclusive practices and a move away from categorising students. It outlines the measures to support learning and inclusion, the specific curricular areas, as well as specific resources to be mobilised to meet the educational needs of each and every child and young person along the school path, in all different education and training offerings. Inclusive education is now mandatorily assessed through external and internal school evaluation cycles (see Chapter 5. ). Due to COVID-19 pandemics and school closure, the third cycle for school external evaluation was suspended in March 2020. Up to this date, 68 school clusters and schools had been already evaluated. A comprehensive report on these evaluations will be presented in two months’ time.

**40.** To support its implementation, meetings and training opportunities have been offered to school boards, teachers and other staff.

**41.** In education, all students, including those with mental disorders, have the right for high-quality equitable education within an education system that serves all learners. Particularly, it considers vulnerable learners who have been excluded from educational opportunities for school success, those

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<sup>14</sup> Portugal is making efforts to shift away from labelling. It is now using the broader category “students in needs of additional needs”, which is broader and based on the type of support measures a student receives rather than their individual characteristics. Identification of students in needs of support measures and the decision regarding the type of measures implemented are done at the school level.

<sup>15</sup> For more explanation, see: [https://eacea.ec.europa.eu/national-policies/eurydice/content/special-education-needs-provision-within-mainstream-education-53\\_en](https://eacea.ec.europa.eu/national-policies/eurydice/content/special-education-needs-provision-within-mainstream-education-53_en) (accessed on 9 December 2021).

from poorest households, ethnic and linguistic minorities and with specific needs and disabilities. For example, the access of students in need of some additional support to the mainstream school is ensured. Nowadays, approximately 98.9% of students in need of additional support attend mainstream schools. These students attend classes with their peers with no specific needs – and for whom are mobilised selective<sup>16</sup> or additional<sup>17</sup> support measures for learning and inclusion, and often therapeutical support<sup>18</sup>.

**42.** It is essential, however, to strengthen the levels of students' participation in the classroom and to raise their levels of achievement. Within this inclusive approach, all students may experience difficulties at one time or another in their schooling and may need support. There is a concern to evaluate all the reasons why children might not learn, both related to the student himself and to the context (e.g., needs of additional support, poor teaching, inappropriate curriculum, inadequate resources, social factors).

**43.** Portugal adopts a broad conception of support. It is understood that support is not the responsibility of a specific professional considered "specialist". Rather, a much broader and systemic perspective is adopted, considering all activities 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.

**44.** The Decree-Law requires that each school possesses a multidisciplinary team (*Equipa Multidisciplinar de Apoio à Educação Inclusiva*, EMAEI) to support inclusive education, with both permanent and variable members. Parents and students are part of the multidisciplinary team (more in section 1.4.2).

**45.** Multidisciplinary teams are responsible for:

- raising awareness of inclusive education in the educational community.
- proposing the learning support measures to be mobilised.
- following up and monitoring the implementation of the learning support measures.
- advising teachers about the implementation of inclusive pedagogical practices.
- preparing technical-pedagogical reports, individual educational programmes (*Programas Educativos Individuais*, PEI) and individual transition plans.
- following up on the functioning of the learning support centres (cf. paragraph 363).

**46.** Once the need for measures to support learning and inclusion 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.

**47.** The multidisciplinary team should adopt a holistic view, considering the academic, behavioural, social and emotional aspects of the learner, as well as environmental factors (namely the school and the classroom). They collect evidence and significant data that make clear information available in order to re-balance the teaching and learning process.<sup>19</sup>

**48.** Besides, the methodologies underlying Decree-Law no. 54/2018, 6th July, are based on the Multilevel Approach to accessing the curriculum and the Universal Design for Learning, a curricular approach based on an intentional, proactive and flexible planning of pedagogical practices, considering the diversity of students in the classroom.

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<sup>16</sup> Selective support measures for learning and inclusion: Differentiated curricular paths; Non-significant curricular adaptations; Psycho-pedagogical support; Anticipation and reinforcement of learning; and Tutorial support.

<sup>17</sup> Additional support measures for learning and inclusion: Curriculum attendance, by subjects; Significant curricular adaptations; Individual transition plan; Development of structured teaching methodologies and strategies; Skills development for personal and social autonomy.

<sup>18</sup> Therapeutical support: Physiotherapy; Psychology; Speech therapy; Occupational therapy; other therapeutic support measures.

<sup>19</sup> For more details, see: <https://www.european-agency.org/country-information/portugal/assessment-within-inclusive-education-systems> (accessed on 9 December 2021).

49. The multilevel approach is based on flexible curricular models for systematic monitoring of the effectiveness of successive interventions for each student to acquire a common set of key competences, focused on their abilities and interests.

*The law for Curriculum Autonomy and Flexibility (Decree-Law no. 55/2018, 6<sup>th</sup> July)*

50. With the goal to promote equal access to the national curriculum and educational success of all students in compulsory education, schools were given more autonomy and curriculum flexibility so that they can develop the national curriculum according to their specific needs and interests. This is set out in the Decree-Law No. 55/2018, 6<sup>th</sup> July;<sup>20</sup> Ministerial Order No. 223-A/2018, 3<sup>rd</sup> August;<sup>21</sup> and Ministerial Order No. 226-A/2018, 7<sup>th</sup> August.<sup>22</sup> 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 is meaningful and beneficial for all their students and their specific contexts.

51. Through these legal documents, schools have been encouraged to change their organisational and pedagogical practices, according to the essential learnings, in order to ensure that all students acquire the competences set out in the Students' Profile. 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.

52. The Decree-Law No. 55/2018 states in its introduction that "The programme of the 21st Constitutional Government assumes as a priority the implementation of an educational policy with a people-centred approach, that ensures equity in the access to public education, therefore promoting educational success and equal opportunities for all. The fulfilment of these purposes, already included in the Education Act, approved by Law No. 46/86, 14<sup>th</sup> October, in its current wording, has been ensured by means of universally applicable measures." It also states that each school has to be "[a]n inclusive school, promoter of better learning for all students".

53. This Decree-Law sets out the curriculum for primary and lower and upper secondary education, 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.

54. According to this Decree, schools are given the opportunity to manage up to 25% of the curriculum, fostering interdisciplinary and collaborative work, problem-based learning (PBL) methodologies and fostering deeper learning respecting every school specific context.

55. To support and monitor the implementation of this curriculum autonomy and flexibility in all public schools there are regional teams for autonomy and curricular flexibility with members from different organisms of the MoE to provide a proximity relation and enable better learning for all.

56. In line with the ENEC (see 1.1.2), 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, aimed at developing a broad range of active citizenship competences deemed essential for any young person to achieve until he/she reaches 18.

57. Furthermore, in order to give a clear guidance in terms of the content and focus of Citizenship Education, within the frame of Citizenship and Development, the legislator followed the injunction of the ENEC and specified different areas of Citizenship Education, split into three groups:

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<sup>20</sup> See : [https://www.dge.mec.pt/sites/default/files/Curriculo/AFC/dl\\_55\\_2018\\_afc.pdf](https://www.dge.mec.pt/sites/default/files/Curriculo/AFC/dl_55_2018_afc.pdf) (accessed on 10 December 2021).

<sup>21</sup> See: <https://dre.pt/application/conteudo/115886163> (accessed on 9 December 2021).

<sup>22</sup> See: <https://dre.pt/application/conteudo/115941646> (accessed on 9 December 2021).

Mandatory for all levels of education (1 <sup>st</sup> through 12 <sup>th</sup> grade)	At least in two levels of primary and lower secondary education (1 <sup>st</sup> through 9 <sup>th</sup> grade)	Optional in any school grade
Human Rights	Sexuality	Entrepreneurship
Gender Equality	Media	Labour World
Interculturality	Institutions and democratic participation	Security, Defence and Peace
Sustainable Development	Financial literacy and consumer education	Animal well-being
Environmental Education	Road safety	Volunteering
Health	Risk	Other

58. According to the ENEC, the areas chosen should (1) express a “non-abstract conception of citizenship”, (2) “identify [...] key areas throughout the school curriculum” and (3) “identify [...] the essential skills of citizen education (skills for a Culture of Democracy).” In this way, “the approach to citizenship education should focus on [...] three axes [...]” through which an active citizenship is to be built: “Individual civic attitude ( citizen identity, individual autonomy, human rights); Interpersonal relations (communication, dialogue); Social and intercultural relations (democracy, sustainable human development, globalisation and interdependence, peace and the management of conflicts).” Aiming at empowering and enabling all children through specific content and skills development and agency, Citizenship and Development is expected to be a major contribution to the appeasement of conflict and the improvement of positive relationships with others and society at large.

#### *Implementation of innovation plans*

59. Ministerial Implementing Order No. 181/2019, of the 11<sup>th</sup> June, allows public and private schools, according to their autonomy and flexibility, to manage more than 25 % of the curriculum. It aims at:

- 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 challenges; and
- improving the quality of learning, the focus on meeting diverse learners’ needs and, ultimately, the success of all.

60. Within this logic, each school can design and present an innovation plan, focused on curriculum and pedagogical innovation. These plans require validation by the MoE. In the present school year (2020-2021) 103 schools are implementing innovation plans.

#### **1.2.2. Programmes and policy plans for equity and inclusion**

61. Educational policies and programmes are now all aligned with inclusion principles described above. Schools have different tools and programmes for the development of quality learning that are effective responses to the needs of all students, for example: (i) the National Strategy for Citizenship Education; (ii) the Innovative plans; (iii) the National Programme for School Success Promotion (PNPSE);<sup>23</sup> (iv) the Priority Intervention Educational Areas Programme; (v) *Tutorias*, as a strategy of personal and school guidance and support; (vi) Mentoring; (vii) MAIA Project<sup>24</sup> – monitoring and research project on pedagogical assessment; (viii) *Voz dos Alunos* (Students’ Voices) – designed to hear pupils’ opinions about

<sup>23</sup> See: <https://pnpse.min-educ.pt/> (accessed on 10 December 2021).

<sup>24</sup> See: [https://www.dge.mec.pt/sites/default/files/ficheiros/relatorio\\_projeto\\_maia.pdf](https://www.dge.mec.pt/sites/default/files/ficheiros/relatorio_projeto_maia.pdf) (accessed on 10 December).

the school, curricula, teachers and what motivates them as well as allowing them to have a voice in decision-making.

**62.** The main central policies/programmes that allow for the adaptation of and support to the learning processes for learners or groups of learners at risk of failure are described in this section.

#### *School Social Assistance (ASE)*

**63.** Implemented in 1971, the granting of school social assistance (*Ação Social Escolar, ASE*) aims to prevent social exclusion and school dropout. It promotes school and educational success, giving all learners the opportunity to successfully complete compulsory schooling, regardless of their social, economic, cultural and family situation. Eligibility for economic aid is structured around income brackets, with full and free support for brackets A and B, including free school meals and compulsory school textbooks.

#### *The Priority Intervention Educational Territories Programme (TEIP)*

**64.** The first generation of the TEIP (*Território Educativo de Intervenção Prioritária*) programme was implemented in the 1996/1997 school year. The third generation, which is currently in place, started in 2012/2013. It includes 136 school clusters (about 17% of the total of Portuguese school clusters) located in areas with high levels of poverty and social exclusion, identified by educational and socio-economic indicators.

**65.** With the support of the MoE, schools in the TEIP programme implement a three-year Improvement Plan focused four areas or axes of intervention:

1. improvement of teaching and learning, and educational success.
2. prevention of early school leaving, absenteeism and indiscipline.
3. school management and organisation.
4. relationship between school, family and community.

#### *Choices Programme (PE)*

**66.** Implemented in 2001, this programme is now in its sixth generation.<sup>25</sup> It targets 6- to 30-year-olds in vulnerable social and economic situations. This includes with an immigrant background and from Roma communities (projects in Portugal) and Portuguese emigrants students (two experimental projects in Luxembourg and the United Kingdom). Its objectives are to promote the social inclusion of children and young people from the most vulnerable social economic contexts. Education is a key lever for equal opportunities and the strengthening of social cohesion. Several measures are included in the projects. For example, Measure 1 on Education and Training aims to contribute to school inclusion and to non-formal education, as well as to vocational training and qualification.

#### *Commissions for the Protection of Children and Youngsters (CPCJ)*

**67.** Implemented in 2001, the CPCJ<sup>26</sup> (*Comissões de Proteção de Crianças e Jovens*) succeeded the Commissions for the Protection of Minors that emerged in 1991. 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's normal participation in school and their educational success. Each Commission includes a representative from the

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<sup>25</sup> See: <http://www.programaescolhas.pt/> (access on 10 December 2021).

<sup>26</sup> See: <https://www.cnpdpcj.gov.pt/cpcj> (accessed on 10 December 2021).

services of the Ministry of Education, preferably a teacher. There are 269 teachers in total, working at CPCJ.

### *The National Programme for School Success Promotion (PNPSE)*

**68.** The PNPSE<sup>27</sup> (*Programa Nacional de Promoção do Sucesso Escolar*) was created in April 2016. its mission is to prevent school failure (reducing retention rates) by a bottom-up approach according to which each school can implement its own strategic action plan in order to promote educational practices and improve learning.

**69.** The PNPSE focuses on the development of public policies in all cycles and levels of education, but with particular emphasis on basic education. It puts a particular emphasis on basic education, as a response to the registered retention rates in these cycles of education before 2016. The purpose of this Programme is to promote quality education for all, combat school failure at its roots, guaranteeing equal opportunities and, overall, improving the effectiveness and quality of public schools. The core objective of the PNPSE is to ensure that all children and young people complete compulsory education with a quality education, supported by a wide variety of learnings.

**70.** In practice, the PNPSE is based on a logic of proximity, it can:

- promote local initiatives of diagnosis and interventions, from the knowledge produced by schools, (their training for an intervention tailored to the local contexts and the specific needs of their target audience)
- promote practices that allow to anticipate and prevent failure through an emphasis on early intervention instead of remedial strategies
- promote joint strategy between entities responsible for the education sector with different educational agents at the local authority level, based on the local diagnosis of the existing problems and needs.

**71.** In August 2020, all the public schools of mainland Portugal (including the TEIP) were invited to apply for the Personal, Social and Community Development Plans (*Plano de Desenvolvimento Pessoal, Social e Comunitário*, PDPSC), which is part of the PNPSE and set out measures to support students in their return to school after confinement due to COVID19 pandemic. These measures aim to welcome them, reinforce their learning, promote well-being, foster social skills and promote interaction with the community. From a total of 810 schools/ school clusters, 668 have designed plans that represent a total of 1316 measures for social and educational intervention, corresponding to an average of 2 measures per plan. During the current school year, 2020/2021, these schools/ 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.

**72.** The following infographics give a comprehensive insight in some of the work of the PNPSE:

- PNPSE Infographics (2019): Strategic Action Plans: Evidence-based bottom-up education policy.<sup>28</sup>
- PNPSE Infographics (2020): Personal, Social and Community Development Plans.<sup>29</sup>

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

**73.** The PNA<sup>30</sup> (*Plano Nacional das Artes*) is a culture and education initiative for 2019-2029 that promotes social transformation by mobilising the educational power of the arts and heritage in citizens' lives. It aims to improve inclusion and lifelong learning in partnership with local administration, private

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<sup>27</sup> See: <https://pnpse.min-educ.pt/> (accessed on 10 December 2021).

<sup>28</sup> See: <https://pnpse.min-educ.pt/node/45> (accessed on 10 December 2021).

<sup>29</sup> See: <https://pnpse.min-educ.pt/pdpsc> (accessed on 10 December 2021).

<sup>30</sup> See: <https://www.pna.gov.pt/> (accessed on 10 December 2021).

bodies and civil society. It operates through partnerships with school clusters that develop their own cultural projects embracing curricular development and inclusive education. PNA is working with 148 School Clusters, spread across the mainland and islands (Azores and Madeira)- and also 2 Portuguese Schools abroad: Mozambique and Timor. In these Schools, the Coordinators of the Cultural School Project (CSP) are identified and CSP Consultative Commissions are formed - with the presence of the school agents, the departments of culture of the City Councils, cultural institutions (directions of theatres, museums, educational heritage services etc.) artistic associations, Higher Education institutions and with the presence of representatives of the various previous Plans, Networks and Programmes existing in these Schools.

**74.** Resident Artist Project: This PNA Project proposes that an artist, a cultural association or a theater company can reside in a school, for a period of at least 3 months. In the academic year 2019/20, there were 19 Artists in Residence. Due to the pandemic, they moved their work online, creating digital resources. Still in a pandemic context, this year partnerships were created with the City Councils, the OEI (Ibero-American States Organisation), the Plan for the Promotion of School Success, which allowed the hiring of 49 Resident Artists.

**75.** Digital Educational Resources Website: Created in March 2019, the page<sup>31</sup> with digital resources for all students, teachers, mediators and parents, continues to grow crossing the arts, heritage, culture with citizenship, sciences and the humanities; more than 300 digital resources, for the various cycles and subject areas, to activate the curriculum with art and culture.

**76.** Academia PNA: Training courses and actions accredited for Teachers. The vast majority are now online teaching, carried out in partnership with the School Association Training Centres.

**77.** Within the scope of the PNA Scientific Council, the National Reading Plan, School Libraries Network, National Cinema Plan, Aesthetic and Artistic Education Programme and Portuguese Museum Network are brought together and articulated.

### *The Qualifica Programme*

**78.** The *Qualifica Programme*<sup>32</sup> (*Programa Qualifica*) is a programme targeting the qualification of adults. Its objective is to improve the levels of education and training of adults, contributing to the improvement of the qualification levels of the population and the improvement of the employability of each person. The *Qualifica Programme* is based on a qualification strategy that integrates educational and training responses and different instruments that promote the effective qualification of adults and that involves a wide network of operators. Among these operators, the *Qualifica Centres (Centros Qualifica)* assume a central role as specialised centres in adult qualification.

### *Adult Education and Training Courses (EFA)*

**79.** The EFA (*Cursos de Educação Formação para Adultos*)<sup>33</sup> are flexible training courses specifically designed for adults, aged 18 or over, that support the development of social, scientific and professional skills, with a duration between one and three years. The completion of an EFA leads to the obtention of a school certification at the basic level (4<sup>th</sup>, 6<sup>th</sup> or 9<sup>th</sup> Grade) or at the secondary level, a professional certification or both. In these cases of a double certification an individual is given the level 1, 2, 3 or 4 of qualification according to the National Qualifications Framework.

### *Education and Training Courses (CEF)*

**80.** The CEF (*Cursos de Educação e Formação*) integrated in the National Catalogue of Qualifications are a path of basic education with double certification, that is, in which the social, scientific and

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<sup>31</sup> See: <https://www.pna.gov.pt/recursos-educativos/> (accessed on 10 December 2021).

<sup>32</sup> See: <https://www.qualifica.gov.pt/#/> (accessed on 10 December 2021).

<sup>33</sup> See: <https://anqep.gov.pt/np4/50.html> (accessed on 10 December 2021).



professional skills required for the exercise of a professional activity are developed and, at the same time, the basic level of education is obtained (Joint Order No. 453/2004, 27<sup>th</sup> July). These courses prepare young people for continuing secondary education studies and for qualified integration into the world of work. The CEF has a duration of two years and culminates in the presentation and defense, toward a jury, of a project, called the Final Evaluation Test (PAF), in which the skills and knowledge that developed throughout the training are demonstrated.

### *Vocational Courses*

**81.** The Vocational Courses<sup>34</sup> (*Cursos Profissionais*) are a double certification path, both academic and professional, targeting young people entering secondary education. By concluding one of these courses, one obtains a level 4 qualification of the National Qualifications Framework. Having a duration of three years and a total workload that varies between 3100 and 3440 hours, these courses focus on technical training (between 1600 and 2140 hours), including work-related training, which makes them a path oriented to the needs of labour market. Nevertheless, it is possible, after completion, to proceed to higher education. At the end of vocational courses, students are required to do a presentation and defence before a jury of a project called the Professional Aptitude Test (PAP). The PAP allows students to demonstrate the skills and knowledge they developed throughout the training. The vocational education and training is, in its core, the paradigm of flexibility in the modular approach to the curriculum, and is based on differentiated pedagogical practices in terms of methodologies, materials, tools, support and forms of assessment. Such an approach fosters the participation, progression and success of all and every student – an inclusive education principle, as stated in the Decree-Law No. 54/2018, of the 6<sup>th</sup> July.

### *Technological Specialisation Courses (CET)*

**82.** The CET (*Cursos de Especialização Tecnológica*) are courses of non-higher post-secondary training that grant level 5 of qualification of the National Qualifications Framework and a diploma of technological specialisation (DET), aiming at the qualified insertion in the world of work and/or pursuing higher education, and the training performed in them can be credited in the higher course to attend by the student. The CET last approximately one year and are organised into three training components (Decree-Law No. 88/2006 of May 23): general and scientific training, technological training, training in the context of work.

Students who can apply:

- Have completed a secondary education or equivalent qualification course.
- Are holders of level 4 qualification of the National Qualifications Framework.
- Have obtained approval in all subjects of 10<sup>th</sup> and 11<sup>th</sup> years and have been enrolled in the 12<sup>th</sup> year of a secondary education course or legally equivalent qualification without completing it.
- Hold a diploma of technological expertise or a higher education degree or diploma and wish for professional requalification.

### *The Digital Programme for Schools*

**83.** The Digital Programme for Schools (*Programa de Digitalização para as Escolas*)<sup>35</sup> is a part of the national Plan for Digital Transition. The Action Plan for the Digital Transition was formally created in April 21, 2020 (Council of Ministers Resolution No. 30/2020), which aims to provide the development of a programme for the digital transformation of schools, with a strong commitment to teacher training, which ensures the acquisition of the competences necessary for teaching in this new digital context. The training of teachers is articulated with the Action Plan for the Digital Development of schools, a fundamental

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<sup>34</sup> See: [https://anqep.gov.pt/np4/cursos\\_profissionais.html](https://anqep.gov.pt/np4/cursos_profissionais.html) (accessed on 10 December 2021).

<sup>35</sup> See: <https://dre.pt/application/conteudo/132133788> (accessed on 10 December 2021).

document to support decision making and the monitoring of work in progress, in the digital area. This measure aims to actively contribute to schools' technological modernisation, bringing students closer to the productivity and collaboration tools they can find in the labour environment. Within this measure, there is also the Digital Teacher Training Plan (*Plano de Capacitação Digital de Docentes*). The objective is to develop teachers' skills in the field of digital literacy and digital skills, necessary for the transversal integration of technologies, so that they assert themselves as tools that facilitate professional and pedagogical practices and simultaneously promoting innovation in the teaching and learning process. Computers with an Internet connection are already being distributed to all students, giving priority to the most economically deprived. Computers with an Internet connection are also being distributed to all teachers.

### *Portuguese Host Language Courses*

**84.** Ministerial Implementing Order No. 183/2020, 5th August, sets out the provision of Portuguese host country language courses (*Cursos de Português Língua de Acolhimento*) courses.<sup>36</sup> This Portuguese Host Language Courses are intended for adults, aged 18 or over, whose mother tongue is not Portuguese and/or for those lacking basic skills, intermediate or advanced courses in Portuguese, in accordance with the Common European Framework of Reference (CEFR). The courses are integrated in the National Qualifications Catalogue and consist of Short-Term Training Units (*Unidades de Formação de Curta Duração*, UFCD). These courses may be developed in flexible pathways, according to the needs of the trainees.

### *The National Strategy for the Integration of Roma Communities (ENICC)*

**85.** Roma communities have been based in Portugal for more than five hundred years. Citizenship was denied to Roma people until the 1822 Constitution and being Roma was considered a crime until the publication of the 1852 Penal Code. 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 the Roma and non-Roma people.

**86.** The Portuguese National Strategy for the Integration of Roma Communities (*Estratégia Nacional para a Integração das Comunidades Ciganas, ENICC*)<sup>37</sup> was established to bring about improvements to the well-being and integration of Roma people, to encourage mutual understanding and positive interaction and to deconstruct stereotypes. It was the result of the involvement of all Ministries, Civil Society organisations, Roma communities and experts. Besides the four main areas proposed by the European Commission – 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. Under the Portuguese National Strategy are foreseen a total of 40 priorities, 105 measures and 148 goals until 2020. Adopted on 27th March 2013, resolution of the Council of Ministers Resolution No. 25/2013, the National Strategy foresees and includes specific actions for Roma communities, as well as measures that have been put into place in the last years not only for Roma, but also for other vulnerable groups.

**87.** However, 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 of the next ENICC.

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<sup>36</sup> See: <https://www.portugal.gov.pt/pt/gc22/comunicacao/comunicado?i=publicada-em-diario-da-republica-portaria-que-cria-os-cursos-de-portugues-lingua-de-acolhimento> (accessed on 10 December 2021).

<sup>37</sup> See: [https://www.acm.gov.pt/documents/10181/52642/enicc\\_ACM.pdf/42f8ef57-8cd7-4118-9170-9fcd9bc53ec2](https://www.acm.gov.pt/documents/10181/52642/enicc_ACM.pdf/42f8ef57-8cd7-4118-9170-9fcd9bc53ec2) (accessed on 10 December 2021).

**88.** The Government has therefore decided to review ENICC to adjust its objectives and targets and, consequently, to enhance its impact on the improvement of the living conditions of the people and communities involved. The priority is to improve the schooling and professional integration and living conditions of Roma people in situations of social exclusion, and to recognise and boost intervention in intercultural mediation, improve information and knowledge and combat discrimination against Roma people.

**89.** Along the same lines, the aim is to place the relevance of Roma integration higher up the political and public agenda, and to coordinate the different sectors that promote this integration, in particular by highlighting the central role of local policies in integrating vulnerable Roma populations. The Council of Ministers Resolution No. 154/2018 of 29th 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 “Portugal + Equal”, namely in recognizing the specific circumstances of Roma people and their experiences of discrimination, and facilitates compliance with international commitments, such as the 2030 Agenda for Sustainable Development.

### *Children’s right to participation*

**90.** Furthermore, promoting the right to participation of children, adolescents and young people has been an increasing concern in Portugal.

**91.** In 2016 the Portuguese Ministry of Education launched a broad debate to teachers, students and parents to enable a participation of all stakeholders in the curriculum redesign process. As such students had the opportunity to voice their view on school and contribute with their proposals in a public conference held in November 2016<sup>38</sup> and after that in a National Seminar as a joint meeting of students from OECD countries during an OECD Education 2030 Working Group meeting.

**92.** As a follow-up, students started being involved in Students’ Agency, within Education 2030, so as to make them participate in their own education and future. This kind of seminars have since then been replicated across the country by means of a national network involving various students, the MoE and other stakeholders. This Student Agency fosters active students’ participation not only at school level, by having a voice in some aspects of school organisation, but also at the regional, national and international level.

## **1.3. Responsibilities for and administration of diversity and inclusion**

**93.** The following central government bodies under the Ministry of Education are responsible for children and students attending Portuguese schools:

- Directorate-General for Education (DGE).
- Directorate-General for School Administration (DGAE).
- Directorate-General for Schools (DGEstE).
- Directorate-General for Statistics of Education and Science (DGEEC).
- Inspectorate-General for Education and Science (IGEC).
- National Agency for Qualification and Vocational Education and Training (ANQEP).

**94.** In recent years, there has been a growing intervention by municipalities in the field of education, assuming new competences previously assigned to the central administration. These competences

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<sup>38</sup> See: <http://www.dge.mec.pt/conferencia-curriculo-para-o-seculo-xxi-voz-dos-alunos> (accessed on 10 December 2021).

include the areas of school social assistance, recruitment and management of human resources, namely non-teaching staff, as well as facilities, pre-school and basic education. Processes for applying for European funds have also been developed, which are triggered by municipalities together with schools, in this case through several projects within the scope of promoting school success and the inclusion of students.

**95.** The Directorate-General for Education (*Direção-Geral da Educação*, DGE), as an entity/organism of the Ministry of Education, 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 national level (from preschool to ISCED3). In this vein, the DGE is responsible for the support and monitoring process regarding the implementation of the education policies defined. Moreover, it is also responsible for the conception and management of specific programmes regarding school achievement. Most of them are aligned with the main challenge that Portugal faces today: the reduction of early school leaving.

**96.** The Directorate-General for Schools (*Direção-Geral dos Estabelecimentos Escolares*, DGEstE) mission is to ensure the regional implementation of administration measures and the exercise of peripheral competences related to the Ministry of Education (MoE), without prejudice to the competencies of the other central services, ensuring the guidance, coordination and monitoring of schools, promoting the development of the respective autonomy, and it is also responsible for the articulation with the local authorities, public and private organisations in the fields of intervention in the educational system, aiming at deepening local interactions and supporting the development of good practices in the performance of local agents and regional education, as well as ensuring the legal-litigation service resulting from the pursuit of its mission. DGEstE's follow-up work is carried out in proximity to schools, teachers, parents, and the entire educational community.

**97.** Considering the more conceptual aspect of DGE's intervention and the level of training of professionals, namely teachers, such as the coordinators of EMAEI, joint meetings / actions have been developed with schools in a multidisciplinary approach. The follow-up and monitoring carried out by DGEstE aim to provide schools with more resources (teachers, specialised support staff, operational assistants), analysing the management that is done in each school, supporting the work that is carried out with children and students, clarifying doubts, and supporting parents, among other areas of intervention.

**98.** The National Agency for Qualification and Vocational Education and Training (*Agência Nacional para a Qualificação e o Ensino Profissional*, ANQEP I.P.) is a public institute integrated in the indirect administration of the State, with administrative, financial and pedagogical autonomy. ANQEP I.P. has superintendence and joint supervision of the Ministries of Education, and of Labour, Solidarity and Social Security, in coordination with the Ministry of Economy and Digital Transition. This Agency's mission is to contribute to the improvement of the qualification levels of young people and adults in Portugal, by promoting either a growing demand for qualifications, school and professional (double certification), at the non-higher level, or a supply of initial and lifelong training that is broadly attractive, of quality and relevant to the labor market.

**99.** The Directorate-General for Education and Science Statistics (*Direção-Geral de Estatísticas da Educação e Ciência*) is a central service of the State's direct administration, with administrative autonomy which operates under the purview of the Ministry of Education (ME) and the Ministry of Science, Technology and Higher Education (MCTES). 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 Ministry of Education, DGEEC provides technical support for policy formulation, strategic planning and operations. DGEEC observes and evaluates the overall results obtained by the educational, scientific and technological systems in coordination with other services of the MoE and MCTES.

**100.** Bearing in mind the accomplishment of the *Students' Profile* for all young students, the Decree-Law No. 55/2018, 6th July, offers greater autonomy and flexibility in how schools manage curricula, thus consolidating their ability to combat inequalities and construct an equitable society.

**101.** The ongoing decentralisation process has made it possible to transfer various powers to municipalities regarding the management of infrastructure and facilities, human resources, social support and curricular enrichment activities, more adapted to the regional/local circumstances.

**102.** The MoE also organises formal stakeholder consultations in order to gather the views of key actors from different horizons, promote participation and strengthen collaboration:

**103.** The Task Force who elaborated the proposal of the new law on inclusive education has 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 disabilities, federations, trade unions and individuals in general.

**104.** The National Council for Education, the Council of Schools, the Association of Schools of Private and Cooperative Education, the Portuguese Cooperative Confederation, the National Confederation of Solidarity Institutions, the Union of Portuguese Misericordia, the Union of Portuguese Mutuality and the political organs of the Autonomous Regions were consulted.

#### **1.4. Education provision to account for diversity**

**105.** In Portugal, the enrolment and attendance regime within the scope of compulsory education for children and young people between 6 and 18 years of age is based on priorities applied by schools for the admission of children and students. The priorities have been evolving in order to guarantee transparency and fight against fraud, promoting equal opportunities and overcoming economic, social and cultural inequalities. These aspects are particularly relevant in schools where demand is greater than the number of places.

**106.** The Legislative Order No. 10-B/2021, of the 14<sup>th</sup> April, sets out the priorities for enrolment or renewal of enrolment in pre-school education, as well as in basic and secondary education. At any level of education and teaching, the first priority is for children and students with specific educational needs in accordance with the provisions of articles 27. and 36 of Decree-Law No. 54/2018, in the wording provided by Law No. 116/2019, of the 13<sup>th</sup> September.

**107.** Compulsory schooling goes up to the 12<sup>th</sup> grade or 18 years of age for all students who can access any school path. Students of scientific and humanistic courses are under the same rules of transition between levels/cycles and to perform external assessment exams.

**108.** According Article 11<sup>th</sup>, point (b), of Legislative Order No. 3A/2020, 5<sup>th</sup> March, CEF students will have to take final cycle tests to pursue studies at the secondary education level in scientific-humanistic courses. It should be highlighted that, due to the pandemic, these tests were not held in the school year 2019/2020, nor will they take place in the school year 2020/2021.

**109.** For the purposes of continuing studies, a student who completes a professional course or a specialised artistic course may take national exams as a self-proposed student, only in relation to the subject(s) that he/she chooses as proofs of entry into higher education, as well as any local access tests required by some higher education institutions.

**110.** A student may also enter under the special competition modalities provided for in Article 5 of Decree-Law No. 11/2020, 2<sup>nd</sup> April, in the event that higher education institutions provide vacancies for

this purpose. In any case, the final classification of access to higher education will take into account the classification obtained at the end of the course and the classification obtained in the eventual entrance exams, according to the conditions established by the institution to which they apply.

**111.** Students of all paths with *significant curricular adaptations*, whose strategies for transition between cycles and levels of education should be mentioned in their Individual Educational Programme and Individual Transition Plan, are an exception, as they do not perform the national assessment exams.

#### **1.4.1. Measures related to curricular adjustments**

**112.** Since the 2018/2019 school year, schools are allowed not only to make curricular adaptations but also to manage up to 25% of the workload in the first years of each level / teaching cycle.

**113.** According to Decree-Law No. 54/2018, 6<sup>th</sup> July (with the amendments introduced by Law No.116/2019, 13<sup>th</sup> September), all the measures to support learning and inclusion aim to adapt to the needs and potential of each pupil and to guarantee the conditions for their full realisation, promoting equity and equal opportunities in access to the curriculum, attendance and progression through compulsory schooling.

**114.** Those measures are organised into three intervention levels: universal, selective and additional (see section 1.2.1) and shall be mobilised throughout the student's school pathway, according to their educational needs. Among others, students may receive differentiated instruction, curricular accommodations, non-significant (or significant) curricular adaptations, anticipation and reinforcement of learning and psycho-pedagogical support.

**115.** Any student can benefit from curricular accommodations which aim to facilitate their access to the curriculum and to 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 styles of each student and to promote their educational success.

#### *Education Training Courses (CEF):*

**116.** CEF (*Cursos de Educação e Formação*)<sup>39</sup> were first implemented during the school year 2004/2005. CEF aim at supporting young people who:

- are at risk of dropping out of school.
- left school before completing 12 years of education.
- are interested in getting a professional qualification before entering the labour market.

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

#### *Education and Training Integrated Programme (PIEF)*

**118.** Created in 1999, the PIEF (*Programa Integrado de Educação e Formação*)<sup>40</sup> is an exceptional measure for students up to 15 years old in a situation of abandonment. It has been redesigned over the years. PIEF is a socio-educational measure, of a temporary and exceptional nature, to be adopted after all

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<sup>39</sup> See: <https://anqep.gov.pt/np4/35.html> (accessed on 6 January 2022).

<sup>40</sup> See: <https://www.dge.mec.pt/programa-integrado-de-educacao-e-formacao> (accessed on 6 January 2022).

other school integration measures have been exhausted, which aims to promote the fulfilment of compulsory education and social inclusion, granting a qualification 2<sup>nd</sup> or 3<sup>rd</sup> cycle school. It 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 CEFs in that it does not confer double certification, academic and professional. They also differ in terms of curriculum and study scope. Its main objective is to recover students who have abandoned the educational system.

### *Distance learning (ED)*

**119.** Drawing on a previous educational provision entitled *Escola Móvel* (Mobile School) in 2005, ED (*Ensino a Distância*)<sup>41</sup> formally became an official educational provision in 2014 through Ministerial Implementing Order No. 85/2014, of the 14<sup>th</sup> April, which was repealed by Ministerial Implementing Order no. 359/2019, on the 8<sup>th</sup> October. It aims to adapt an educational and training offer to learners for whom face-to-face teaching is not possible. A virtual education platform was put in place for:

- children of travelling professionals.
- learners integrated in social solidarity institutions.
- learners with health problems or physical conditions that limit their regular attendance at school.
- other specific cases.

**120.** ED aims to ensure equal access to education, stable educational paths, quality learning and the educational success of learners 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. Both b-learning and e-learning models are used in Distance Learning (ED). Host schools are responsible for the time management of the curriculum and students attend both synchronous and asynchronous sessions according to the plan established by their host school. 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 (PCA)*

**121.** PCA (*Percurso Curricular Alternativo*)<sup>42</sup> were implemented in 2006. They are a specific educational provision for exceptional circumstances and require prior authorisation from the Ministry of Education. These pathways target learners who have repeated years in the same cycle and are at risk of early school leaving or experience school or social exclusion. PCA are adapted to the profile and specific needs of each learner. They are part of a re-orientation strategy of the learner's educational path and aimed at facilitating integration into mainstream or diversified education. Currently, PCA are integrated into Innovation Plans established by the Ministerial Implementing Order no. 181/2019, of the 11<sup>th</sup> June (see section 1.2.1). These innovation plans are submitted to the MoE so that they can be analysed and approved.

### *Specific Tutorial Support (ATE)*

**122.** Implemented since 2016/17, ATE (*Apoio Tutorial Específico*) consists of close support to learners in the second and third cycles of basic education who are over 12 years old and have had two or more retentions. It aims to prevent early school leaving, increase retention and consequently promotes educational success, complementing other existing measures.

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<sup>41</sup> See: <https://www.dge.mec.pt/ensino-distancia> (accessed on 6 January 2022).

<sup>42</sup> See: <https://www.dge.mec.pt/percursos-curriculares-alternativos> (accessed on 6 January 2022).

### *Portuguese as a Second Language – Português Língua Não Materna (PLNM)*

**123.** 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 migrants and, more recently, of refugees, in primary and secondary education.

**124.** In order to improve the educational success of immigrant students recently arrived in the Portuguese educational system, the Ministry of Education 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. These students are offered the school subject Portuguese as a second language (PL2) – PLNM (*Português Língua Não Materna*), in primary and secondary education (ISCED 1, 2 and 3). 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, social background, origin and age.

**125.** 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 scientific-humanistic 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 (cf. article 12 of Ministerial Implementing Order No. 223-A/2018,<sup>43</sup> 3rd August, and article 11 of Ministerial Implementing Order No. 226-A/2018,<sup>44</sup> 7th August, and No. 235-A/2018, of the 23<sup>rd</sup> August<sup>45</sup>).

**126.** All public primary and secondary schools in the Portuguese educational system offer these measures. Through the realisation of an interview and placement tests, immigrant students placed at the A1, A2 or B1 language levels, according to the CEFR for Languages, can benefit from PLNM classes for the development of the Portuguese language and follow a specific PL2 curriculum. Immigrant students placed at the B2 and C1 language levels follow the Portuguese subject as described in the national curriculum and can benefit from additional language support classes. Furthermore, the 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 are adequate to their language level instead of the regular final exams of the Portuguese subject.

**127.** 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, in order to ensure their successful school inclusion in the national curriculum.

### *Portuguese Host Language (PLA)*

**128.** PLA (*Português Língua de Acolhimento*) courses were created by Ministerial Implementing Order No. 183/2020, of 5 August, are aimed at adults aged 18 years or over, whose mother tongue is not Portuguese and / or who do not have basic, intermediate or advanced skills in Portuguese, according to the CEFR.

**129.** The PLA courses are promoted by public schools, by the network of centres of direct and participatory management of the Institute of Employment and Professional Training, I. P. (IEFP, I.P.) and by the network of Qualifica Centres.

**130.** The PLA courses are organised by competence and training standards included in the National Qualifications Catalogue (*Catálogo Nacional de Qualificações, CNQ*), to which correspond the levels A1 to

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<sup>43</sup> See: <https://dre.pt/application/file/a/115879412> (accessed on 10 December 2021).

<sup>44</sup> See: <https://dre.pt/application/file/a/115941797> (accessed on 10 December 2021).

<sup>45</sup> See: <https://dre.pt/application/file/a/116154435> (accessed on 10 December 2021).



B2 of linguistic proficiency according to the CEFR. The CNQ also includes a specific short-term training unit that must be mobilised when adults use an alphabet other than Latin or another writing system.

#### *Learners with refugee status and asylum seekers*

**131.** In force since 2015/16, this programme aims to welcome and include migrant learners into Portuguese schools by supporting progressive access to the national curriculum and fostering their educational success. It reinforces support for Portuguese language learning as a subject of study and language of schooling and provides specific educational measures. These include simplifying the process of academic degree recognition, progressive integration in the curriculum, reinforcement of Portuguese language learning and ASE.

#### *Adjustments for students in need of additional support within mainstream education*

**132.** While students in need of additional support 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.

**133.** To ensure specialised support for learners, specialised support staff might be available, often provided by the Resource Centres for Inclusion (*Centros de Recursos para a Inclusão*, CRI) supporting the school. One of the fundamental pillars of the strategy for the inclusion of learners in need of additional support in public schools is the specialised professional support of the CRIs. After an accreditation process by the Ministry of Education for this purpose, the CRI has established a yearly contract of specialised services, with the following key intervention areas:

- specialised support units for the education of learners with multiple disabilities and congenital deaf blindness.
- support for the specialised evaluation of children and young people.
- support for the implementation of curricular enrichment activities (specific programmes, adapted sport practice, etc.).
- support in the development, implementation and monitoring of PEI.

**134.** Deaf learners who 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. Deaf students are also entitled to teachers with specialist 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.

**135.** Some learners in need of additional support can also be entitled to *specific curricular areas*. Such areas include vision training, using the Braille system, guidance and mobility, specific information and communication technologies and activities of daily life.

**136.** Assistive products/devices are made available to enable participation in the learning process and to access curriculum. The Information and Communication Technology Resource Centres for special education (*Centro de Recursos de Tecnologias da Informação e Comunicação para a Educação Especial*, CRTIC) carry out the assessment of students' needs, at the request of the schools, for the purpose of granting the assistive products/devices which are financed by the Ministry of Education, under the System of Assignment of Assistive Products (Legislative Order No. 7197/2016, 1<sup>st</sup> June) .

**137.** The Ministry of Education's Resource Centre (RC)<sup>46</sup> produces schoolbooks in Braille, large font and DAISY (Digital Accessible Information System) formats. CRTIC also produce adapted material and train teachers to use special software for different disabilities. RC and CRTIC cooperate on: requesting school textbooks or other adapted materials when schools have difficulties in their execution; information and monitoring of the response to requests made by schools in the geographical area covered by the CRTIC; support for students and teachers to handle digital school manuals and specific software; braille printing at the request of the RC; specific training on the use of some adapted materials.

**138.** The National System of Early Intervention integrates an organised set of services under the responsibility of the Ministries of Education, Health, Labour and Social Security aimed at children ages between 0 and 6 years old and their families. Its mission is to guarantee Early Childhood Intervention (Decree-Law No. 281/2009, 6<sup>th</sup> October<sup>47</sup>). The intervention shall be carried out in the usual environments of children (home, day-care, kindergarten, others), during daily routines and activities in order to promote the child's participation in learning experiences, starting from the goals defined by the family.

#### *Separate provisions for students in need of additional support: Special Schools*

**139.** There are still some special schools in Portugal (Implementing Orders No. 1102/97 and 1103/97, 3rd November)<sup>48</sup>, covering 1.1 % of students with disability. For a child (within the age range of compulsory schooling, 6-18 years old) to attend a special school, the services of the Ministry of Education have to give permission. This permission is based on evidence that the mainstream school cannot provide an adequate and specific educational answer to the child due to their severe or complete impairments.

**140.** The school calendar for private special education schools is defined annually by the MoE (as well as for mainstream schools). Special education schools close for holidays for thirty days. However, they have to ensure the occupation of students through the organisation of free activities in periods outside of school activities and on holidays and at all times of academic activities interruption. Since the 2009/2010 school year, following the Decree-Law No. 3/2008, the education of students in need of additional support began to occur in general educational contexts. At that time, the knowledge and experience accumulated by the special schools were mobilised to ensure the specialised skills of the general schools of the communities, in a collaborative complementarity regime, and these special schools were converted into CRI.

**141.** Today, all the measures to support learning and inclusion are, preferably, implemented in the context of the classroom, even when the intervention requires the presence of a special education teacher. In mainstream schools, children should be in the classroom full-time along with their peers. Within this context, it is still possible for some children to sometimes be out of the classroom in order to develop specific competences in other school settings.

#### **1.4.2. Adaptation of students' learning assessment**

**142.** Learning outcomes are set according to the *Students' Profile*, which equally applies to every student regardless of their identity, geographical or economic background. All the students have the right to adjustments in the evaluation process, as detailed in the Article 28 of Decree-Law No. 54/2018.

**143.** For internal summative assessment, Legislative Order No. 1-F/2016, 5<sup>th</sup> April, Ministerial Implementing Order No. 223-A/2018, 3<sup>rd</sup> August and Ministerial Implementing Order No. 226-A/2018, 7<sup>th</sup> August, define the framework for evaluation and certification of learning. They also outline measures to

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<sup>46</sup> See: <https://www.dge.mec.pt/requisicao-de-materiais-em-formatos-aceessiveis> (accessed on 10 December 2021).

<sup>47</sup> See: <https://dre.pt/application/file/a/491335> (accessed on 10 December 2021).

<sup>48</sup> See: <https://dre.pt/application/conteudo/675019> (accessed on 10 December 2021) and <https://dre.pt/application/conteudo/675023> (accessed on 10 December 2021).

promote educational success. These can be adopted to monitor and develop learning, alongside others that schools can adopt according to their own autonomy.

**144.** According to Decree-Law no. 54/2018 students can benefit from the following adaptations in relation to the assessment of their learning:

- using diverse instruments for collecting information, such as surveys, interviews, video or audio recordings.
- test/exam sheets in accessible formats, namely Braille, tables and maps in relief, DAISY format, digital.
- interpretation in Portuguese sign language.
- using assistive products/devices.
- having extra time for the test.
- transcription of the answers.
- reading the test/exam sheets.
- using a separate room.
- taking supervised breaks.
- using colour identification codes in the test/exam sheets.

**145.** Furthermore, students with a migrant background can use the dictionary in final tests and national final examinations under certain conditions. Indeed, according to Legislative Order No. 3-A /2020, 5<sup>th</sup> March (Article 31, no. 5):

- In the PL2 final test of year 9, in the PL2 national final examination (Year 12) and in the PL2 *Provas de Equivalência à Frequência* of ISCED 1 and 2, dictionaries are not allowed.
- In the tests of the other subjects, the dictionary of Portuguese-students' Mother Tongue and of students' Mother Tongue-Portuguese dictionaries may be used. This does not imply additional time, nor the application of any other measure.
- In case there is no dictionary of the student's mother tongue-Portuguese, it is allowed to use the dictionary of the student's Portuguese-Second Language and the student's Second Language-Portuguese.
- B2 proficiency level students sit the Portuguese subject final test (Year 9), the Portuguese subject national final examination or the *Provas de Equivalência à Frequência* of Portuguese subject, in the case of ISCED 1 and 2. The students may use the unilingual Portuguese dictionary only in these tests.

### 1.5. Overarching factors: socio-economic status and geographical location

**146.** Educational services respond to students' specific needs. Access to funding or need-base assistance is universal, according to economic standard/level of families' annual income.

**147.** Besides the School Social Assistance (see section 1.2.2) and distance education tools, there are some nation-wide policies aiming at supporting students from lower socio-economic backgrounds and in remote or challenging geographical locations. They mainly focus on the distribution of free school meals and school materials (pencils, writing books). Provision of IT devices for these students is presently being programmed. Recently, schoolbooks have been provided to all students equally.

**148.** Regarding afterschool activities, there is a general programme (*Extracurricular Activities*) for primary schools that can be attended by every student (*Extracurricular Activities*). These activities are free and for all students. There are different playful activities, related to arts, sports, scientific and technical domains, local traditions, the environment, solidarity, and volunteering of European dimension in

education. Extra-curricular activities (*Atividades Extracurriculares*, AEC) are, above all, an important educational policy instrument aimed at promoting equal opportunities, reducing social asymmetries and school success. These activities aim to provide all students, regardless of their socioeconomic context, contact with different areas of an artistic, cultural, etc. nature and to a variety of experiences. In the development of AEC, the following are assumed as guides, among other aspects: (i) value of local cultural expressions, making them AEC in response to interests and needs of students and families, creating opportunities for new, rich, and diversified programmes that contribute to the integral training of students; (ii) contribution to the enrichment of the curriculum, in a predominantly playful register. None of these activities should promote homework scheduling.

**149.** Transportation from/to school is provided in some regions/locations and managed by City/Town Halls. School transportation is free for all students residing more than 3 km away from the school and for those with mobility difficulties, regardless of the distance from their residence to the school they attend.

**150.** Also, socio-economic criteria are not considered in students' selection. The rules established for the constitution of classes and the action of the Inspectorate (*Inspecção-Geral da Educação e Ciência*, IGEC) for monitoring and control are factors that deter student concentration. Legislative Order No. 10-B/2021, 14<sup>th</sup> April, establishes the registration and renewal procedures and the rules to be observed in the distribution of children and students. Legislative Order No. 10-A/2018, 19<sup>th</sup> June, sets out the norms for kindergarten and schools opening and closing hours. It also sets out the norms for organising groups/classes in preschool and compulsory education so as to promote more academic success in line with the qualitative and inclusive dimension of education. Among the predictors of school success are the pedagogical dynamics enhanced not only at the individual level, but also at the level of the organisation of the class in which each student is inserted. Among these dynamics, pedagogical differentiation in the classroom is essential for promoting greater inclusion.

**151.** For differentiation to be possible, the constituted groups must have a dimension that favours it. In the constitution of groups and classes, the heterogeneity of children and young people is respected, and the director, having heard the pedagogical council, can meet other criteria that are decisive for the promotion of success and the reduction of school dropout. In the same sense, the inclusive education law establishes the principles and the norms that guarantee inclusion, as a process which aims to respond to the diversity of needs and potential of each one of the students, through increased participation in learning processes and in the life of the educational community.

**152.** Also, the regional teams and the national coordination of curricular autonomy and flexibility, which includes leaders of the different services of the Ministry of Education, have in mind the analysis they carry out of the innovation plans presented by the schools, safeguarding the principle of non-segregation. IGEC's action also competes, in its different activities for the same guarantee.

**153.** There are follow-up actions and projects in some schools located in certain regions. Monitoring can be carried out, for example, by regional teams created within the scope of curricular autonomy by the Ministry of Education, favouring dynamics of sharing, collaboration, and dissemination of practices, focusing on the dimensions of scientific, didactic, and pedagogical training. IGEC also has an activity to monitor schools alongside their external evaluation. Within the scope of its competences, one of the aspects of DGEstE's proximity monitoring to the educational communities (students, families, schools, municipalities, and other local entities) involves the implementation of educational offers / responses that safeguard the superior interest of students and families in combating failure and early dropout. The measures indicated are the object of evaluation in each school and, also, of follow-up and monitoring by the services of the Ministry of Education. They aim to ensure the success of students through appropriate responses to different contexts, from a diagnosis made:

- Ministerial Implementing Order No. 181/2019, 11th June - schools can submit innovation plans. This decision is based on the need to implement curricular and pedagogical responses appropriate to the context of each educational community and aims to promote the quality of learning and the full success of all students. Within the scope of their curricular autonomy, and attentive to principles

that underpin innovation plans, schools can design alternative curricular paths conditioned to the cumulative verification of the following requirements:

- The identification of a group of students from the same school year for which specific management of the basic curricular matrix, of a temporary nature, constitutes the appropriate response.
  - None of the existing educational and training offers proves to be adequate.
- «Second Opportunity» - Legislative Order No. 6954/2019, 6<sup>th</sup> August - establishes the guidelines that preside over an intervention programme with for young people who abandoned the educational system and at risk of social exclusion, called «Second Opportunity». As can be read in the preamble: 'The Education Act, approved by Law no. 46/86, of the 14<sup>th</sup> October, , amended by Laws No. 115/97, 19<sup>th</sup> September, No. 49/2005, 30<sup>th</sup> August, and No. 85/2009, 27<sup>th</sup> August, enshrines the right to education by guaranteeing a permanent formative action oriented to the global personality development, social progress, and the democratisation of society, also establishing that the education system must be organised in such a way as to ensure a Second chance schooling for those who did not enjoy it at their own age. In the XXI Constitutional Government Programme, education and training are considered essential foundations for the future of people and the country, constituting a privileged means of promote social justice and equal opportunities.'
  - PIEF - Integrated Education and Training Programme (established by Decree-Law No. 55/2018).

**154.** Classes were created under these regulations, operating essentially in schools of the Ministry of Education, as well as in institutions dedicated to young people who drop out of school or who are at risk of dropping out of school. The most recent legislation on this programme is Decree-Law no. 55/2018, which refers in point 1, of article 9: "With a view to fulfilling compulsory education and promoting social inclusion, it can be adopted, once other measures to promote school integration have been exhausted, an integrated education and training programme, operating within the scope of various training offers, constituting a socio-educational and training measure of inclusion, of a temporary and exceptional nature".

**155.** A regulation has been defined for the constitution and operation of PIEF classes so that schools can present their projects that respond specifically to their students.

**156.** This is a socio-educational measure, of a temporary and exceptional nature, to be adopted after all other Integration / Inclusion measures have been exhausted, aimed at students over 15 years of age, with an age gap of 3 years or more compared to the level of education attended, situation of risk and early school leaving and / or with processes of promotion and protection, guardianship education or criminal proceedings.

**157.** PIEF classes can operate in educational establishments of the Ministry of Education, or in exceptional and duly substantiated cases, in facilities of other entities, duly authorised by DGEstE, with most human resources ensured by the Ministry of Education. There is a Pedagogical Technical Team (ETP) which, in addition to the teachers, has a specialist trained in Psychology or in a Social Work area. MoE ensures that these specialised support staff accompany the classes in question. In the 2020/2021 school year, 154 classes were held, involving 1900 students and 108 support specialists (TIL) placed to support the classes.

**158.** As mentioned above, there are rules for the constitution of classes and the action of IGEC for monitoring and control are factors that deter student concentration. The legal diploma for enrolments establishes the following priorities:

**159.** Priorities in enrolment or renewal of enrolment in basic education

- In basic education, the vacancies existing in each educational and teaching establishment for enrolment or renewal of enrolment are filled, giving priority, successively, to students.

- With specific educational needs in accordance with the provisions of articles 27 and 36 of Decree-Law no. 54/2018, as amended by Law no. 116/2019.
- That in the previous academic year have attended pre-school or basic education in the same group of schools.
- With siblings or other children and young people, who are proven to belong to the same household, who attend the desired educational and teaching establishment, under the terms provided for in paragraph 4 of article 2.
- ASE beneficiaries, whose guardians are proven to reside in the area of influence of the intended education and teaching establishment.
- ASE beneficiaries, whose guardians develop their professional activity, demonstrably, in the area of influence of the intended education and teaching establishment.
- Whose parents and guardians are proven to reside in the geographic area, giving priority to students who, in the previous academic year, have attended the school cluster.
- That in the previous academic year have attended pre-school education in institutions of the social and solidarity sector in the area of influence of the educational establishment or in an education and teaching establishment of the same group of schools, giving preference to those who are proven to reside closest to the chosen educational and teaching establishment.
- Whose parents and guardians develop their professional activity, demonstrably, in the area of influence of the education and teaching establishment.
- Older, in the case of enrolment, and younger, in the case of renewal of enrolment, with the exception of students in a situation of retention who have already started their cycle of studies at the educational and teaching establishment.

**160.** With respect to the priorities established in the previous number, other priorities and or tiebreaker criteria may be defined in the internal regulations of the education and teaching establishment.

**161.** Portugal awards scholarships based on academic merit to the students from lower socio-economic backgrounds as a way of supporting secondary school attendance. In Portugal, there is a monthly social benefit (family allowance), which is paid by Social Security for each child / young person, and which aims to compensate the costs of families with the support and education of their children.

**162.** There are 4 tiers of family allowance, tier 1 being the one with the lowest income. In turn, school social action aims at the equity of the educational system, extending the policy of supporting families about school attendance. There are two echelons of school social action (echelon A and echelon B) and the criteria for their attribution are the same as those used for the attribution of family allowance, that is, echelons 1 and 2 of the family allowance correspond respectively to the echelons A and B of school social action. Merit Scholarships, with the purpose of promoting equal opportunities in access to secondary education, contributing to the development of the qualification of the Portuguese, are awarded to students in the A and B levels of school social action in the same amount.

**163.** All students, attending public schools, have the right to enjoy a complete meal, the value of which depends on the socio-economic status of the family. For students with lower socio-economic status the meals are free.

## 1.6. Impact of COVID-19 focus

### 1.6.1. General

**164.** With the publication of the Decree-Law No.10-A/2020,<sup>49</sup> 13rd March, which has laid down extraordinary measures in response to the pandemic situation, in-person classes were suspended.

**165.** On 27 March 2020, the document 8 Guiding Principles for the Implementation of Distance Learning<sup>50</sup> was published, in order to support schools conceiving their strategy and distance learning plans which could better respond their contexts.

**166.** Decree-Law No. 14-G/2020, 13<sup>rd</sup> of April,<sup>51</sup> was published, establishing that the learning process should continue through remote teaching, according to the methodologies that each school considers the most appropriate and on the basis of the distance learning plan defined.

**167.** Two editions of the online teacher training course “Digital and Network Education” were developed by the Ministry of Education in collaboration with the Open University, *Universidade Aberta*, in April/June 2020. They were implemented at the national level and involved around 3400 participants, including schools’ headmasters, teachers with leadership functions and the Training Centres of Schools’ Associations. They focused on deepening several themes related to the conception and the implementation of a school’s distance learning plan.

**168.** With the goal to ensure equity for all students regarding the access to the curriculum, the Ministry of Education together with the national public service TV channel RTP launched the *#EstudoEmCasa* (*#HomeStudy*) Programme,<sup>52</sup> since 20th April 2020, which broadcasted educational content (621 classes). This content targeted students from ISCED 1 and 2, based on the Essential Learning in all subjects of the national curricula, organised in grades: 1st and 2nd grades; 3th and 4th grades; 5th and 6th grades; 7th and 8th grades; 9th grade.

**169.** In April 2020, the document 9 Guiding Principles for the Monitoring of Students who attend *#EstudoEmCasa*<sup>53</sup> was published, explaining the purpose of the *#EstudoEmCasa*, i.e., making educational resources available firstly for students with no access to technology, regardless of other educational strategies used by teachers/schools. The classes broadcasted were complemented with additional educational activities sent to students, Municipalities, the post office and other volunteers helped to contact students and families and to home deliver some materials. Furthermore, students were closely accompanied by teachers-mentors from their schools who were responsible for monitoring their learning.<sup>54</sup>

**170.** Acknowledging the crucial role of schools for the development of children and young people education, as well as for the normal life function of family and professional and economic life of the country, the Council of Ministers’ Resolution No. 53-D/2020, 20<sup>th</sup> July,<sup>55</sup> established the guidelines for school reopening for the school year 2020/2021. Among other elements, this resolution sets up principles to be followed such as the reinforcement of mechanisms to promote equality and equity, bearing in mind the need to conceive specific school responses that reduce inequalities, always within the frame of the *Students’ Profile by the End of Compulsory Schooling*. The Resolution also defines physical classes as the rule to be adopted by all schools, which can be replaced on an exceptional and temporary basis by hybrid

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<sup>49</sup> See: <https://dre.pt/application/conteudo/130243053> (accessed on 10 December 2021).

<sup>50</sup> See: [https://www.dge.mec.pt/sites/default/files/roteiro\\_ead\\_vfinal.pdf](https://www.dge.mec.pt/sites/default/files/roteiro_ead_vfinal.pdf) (accessed on 10 December 2021).

<sup>51</sup> See: <https://dre.pt/application/conteudo/131393158> (accessed on 10 December 2021).

<sup>52</sup> See: <https://www.rtp.pt/play/estudoemcasa/> (accessed on 10 December 2021).

<sup>53</sup> See: [https://www.dge.mec.pt/sites/default/files/escolas\\_estudoemcasa.pdf](https://www.dge.mec.pt/sites/default/files/escolas_estudoemcasa.pdf) (accessed on 10 December 2021).

<sup>54</sup> The content produced is available at <https://estudoemcasa.dge.mec.pt/> (accessed on 10 December 2021).

<sup>55</sup> See: <https://dre.pt/application/conteudo/138461849> (accessed on 10 December 2021).

models of learning or by distance learning alone, in accordance with the guidance of the regional entity responsible for health.

**171.** With the experience acquired during the distance learning period, the MoE acknowledges that there was a damage or disruption in the learning process for some students, due to several reasons. In order to address this unique challenge, the document Guidelines for the Recovery and Consolidation of Learning throughout the 2020/2021 School Year<sup>56</sup> was produced. In order to mitigate the inequality generated in the context of distance education, it encourages schools to design an Action Plan for the recovery/consolidation of learning. While guiding the development of education throughout the 2020/2021 school year, the Action Plan should integrate activities to be developed more intensively during the first weeks of classes. The schools are able to manage the curriculum, adopting specific organisational, curricular and pedagogical responses, with a view to the success and inclusion of all students. It is important to promote the transition to subsequent learning, in a logic of continuity, progression and increasing complexity, safeguarding the sequentially of the teaching, evaluation and learning processes.

**172.** The Government is also going to provide schools with additional funding regarding the hiring of teaching and non-teaching staff.

**173.** In order to achieve the goal of “Universalisation of the Digital School”, the Ministry of Education is implementing measures that will progressively allow to increase of this strategy.

**174.** The Digital School programme is based on four pillars (equipment, connectivity, teacher training and digital pedagogical resources), in which access to digital equipment and connectivity are set as priorities. At first, particular attention was paid to students within the scope of the ASE. The distribution started with students attending secondary education and those who already had advanced to the 3rd cycle of basic education and were benefiting from support within the scope of the ASE (from levels A and B). The defined priorities include, first of all, students covered by School Social Assistance, level A, followed by those of level B. B and then level C. The A, B and C school allowance brackets are referenced to the family allowance brackets for children and young people, also assigned by Social Security. The social security family allowance is calculated according to the household's income. The first 2 levels of the family allowance correspond to the 2 levels of the school allowance – A and B. The full or partial nature of the corresponding benefits is determined by the corresponding step.

**175.** The remaining cycle (primary and lower secondary education) and progressively all students, will also benefit from the measures implemented under the Digital School Programme.

**176.** At the beginning of the pandemic, before the implementation of the digital school plan, solutions were found in each school for students without access to electronic equipment at home

**177.** were also prioritised. Computers were also allocated through donations.

**178.** The General Secretariat for Education and Science (*Secretaria-Geral da Educação e Ciência*, SGEC) is the entity responsible for supplying the equipment to schools, which, in turn, oversee giving it to the beneficiaries. This process requires the delivery of the equipment at school, and the signing of a Cooperation Agreement on the use of the equipment between the respective school and the SGEC, as well as the signature of a Delivery Auto by the parent/guide of the student to whom the kit is assigned.

**179.** Each kit is made up of a laptop, headphones with microphone, a backpack, a hotspot and a SIM card, which guarantees connectivity from anywhere in the country (assuming responsible use of mobile data). Three different types of computers were defined: 1) 1<sup>st</sup> cycle of basic education; 2) 2<sup>nd</sup> and 3<sup>rd</sup> cycles of basic education; and 3) secondary education.

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<sup>56</sup> See: <https://apoioescolas.dge.mec.pt/index.php/node/1072> (accessed on 10 December 2021).



- 180.** The types of equipment were adjusted to the estimated learning needs of each educational level.
- 181.** The distribution of equipment has been managed, followed and monitored by DGEstE, also, by the registration of information by schools on a platform created for this purpose.
- 182.** This has been a work of articulation between DGEstE, SGEC and DGEEC with different levels of intervention

### **1.6.2. Students**

- 183.** During school closures, all students were closely accompanied by teachers (and also by specialised support staff from their schools, responsible for monitoring their learning at home. Schools were responsible for adapting the teaching methodologies to the students' needs and implementing appropriate communication strategies.
- 184.** When necessary, schools, municipalities and governmental and non-governmental organisations collaborated to strengthen communication between the school and the family, including through the use of cultural mediators.
- 185.** When necessary, schools, municipalities, local organisations, local police and post offices as well as volunteers worked collaboratively to foster a better school-family communication, as well as the provision of digital advice and the collecting and delivering of school assignments.
- 186.** Concerning the participation rates in distance learning, and according to the national report "We are ON with schools: Knowing to Support Educational Measures and School Survey Results"<sup>57</sup> carried out by the Directorate-General for Education and Science Statistics, the majority of the students followed the activities on a regular basis, from the 1<sup>st</sup> phase onwards, at the end of the 2<sup>nd</sup> period, being this rate much higher in the case of secondary education. In Portugal, in the school year 2019/2020, there was only one lockdown period – face-to-face school activities were suspended on 16<sup>th</sup> March 2020, and were resumed for the two final grades of upper secondary education (11<sup>th</sup> and 12<sup>th</sup>) on 18<sup>th</sup> May 2020, only for the subjects students needed to take national examinations, for applying to tertiary education purposes.
- 187.** Not related to this situation, but also important to highlight: face-to-face school activities were also resumed in pre-primary education, on 1 June 2020. The 1<sup>st</sup> phase corresponds to the first (and most severe) weeks of confinement that occurred at the end of March. The 2<sup>nd</sup> phase started at end of April and basically reflected the solutions implemented by the schools at the beginning of the third period of the school calendar. The report highlights that the greater autonomy of these students, the greater availability of digital means and a possible effort of involvement oriented towards the secondary school classes may be hypotheses for the differences registered during the 1<sup>st</sup> phase.
- 188.** Moreover, the vast majority of schools have programmed specific work with students without access to computers and the Internet, in addition to the television content made available by the #EstudoEmCasa initiative, and this figure has also increased in the 2<sup>nd</sup> phase of enquiry compared to the 1<sup>st</sup> phase.

### **1.6.3. Teachers**

- 189.** Since the beginning of the lockdown, all types of training have been adapted to online training modalities. Teacher training continued in collaboration with the Scientific-Pedagogical Council for continuous training, which approves the credited modalities of the continuous training for teachers. The courses and workshops were adapted so as not to stop training but to adapt to this new normal. Even the

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<sup>57</sup>See:

[https://www.dgeec.mec.pt/np4/474/%7B\\$clientServletPath%7D/?newsId=1161&fileName=Relatorio\\_do\\_questionario\\_escolas\\_o\\_n\\_fin.pdf](https://www.dgeec.mec.pt/np4/474/%7B$clientServletPath%7D/?newsId=1161&fileName=Relatorio_do_questionario_escolas_o_n_fin.pdf) (accessed on 10 December 2021).

courses that were scheduled with face-to-face sessions were adapted for online sessions and all training continued. In addition, new courses and webinars were launched.

**190.** DGE promoted an online course to school principals and intermediate leaders, in a partnership with Open University of Portugal, with focus on digital teaching in networking. It involved about 3600 participants. With the goal of supporting schools in what regards the development of distance learning, the MoE released a comprehensive roadmap entitled - 8 Guiding Principles for the Implementation of Distance Learning (E@D), which presents a set of guidelines for schools to abide by.

**191.** This instrument aims at supporting schools in the design of the best Distance Learning Strategy and Plan (E@D), based in the assumption that the ways in which schools organised themselves in order to carry on the teaching and learning process at a time when teaching face to face activities are suspended, can easily translate into a panoply of possibilities, mostly depending on the characteristics of each educational setting.

**192.** In order to achieve the greatest coverage in terms of the implementation of exceptional educational measures for all students, the MoE, in its effort to create and provide multiple resources to support schools, has created a supplementary set of educational resources, for preschool, primary and lower secondary education, which were broadcasted on national TV, through the channels RTP 2 and RTP Memória.

In collaboration with several leading partners, the MoE has also organised a set of initiatives, namely:

- The creation of a website to support schools,<sup>58</sup> in which documents, materials and educational resources to support teachers were made available. Each school cluster carried out their online planning. Each teacher found a way to communicate with their students and their families.
- This website was meant to all school levels.
- The development of several guiding and structuring documents for the organisation of these new work methodologies.
- The preparation of content to be made available in TV format, through the initiative #EstudoEmCasa.
- The organisation of a sharing community on the *Youtube* channel, in an initiative entitled #EstudEmCasa.Youtube.
- The implementation of a large-scale teacher training (<https://www.dge.mec.pt/noticias/formacao-para-docencia-digital-e-em-rede>).
- We are ON Platform - Support for school Directors.
- MOOC (Massive Open Online Courses) E@D – MOOC on Distance Learning.
- Serie of Webinars on Distance Learning.

**193.** The MoE wrote the preface and published an e-book entitled “Teaching and learning in COVID-19 times: between chaos and redemption,” edited by the Education and Psychology Faculty of the Portuguese Catholic University. It is a collection of 28 texts written by teachers from different education levels, school leaders and a primary school student, who share experiences and ideas on education during the crisis.

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<sup>58</sup> See: <https://apoioescolas.dge.mec.pt/> (accessed on 10 December 2021).

## Chapter 2. Resourcing for diversity, equity and inclusion in education

### 2.1. General distribution of resources for inclusive education

**194.** The global budget for education covers all learners. The system of funding is not tied to categories/types of disability. The MoE ensures the allocation of a set of human resources from different fields to mainstream schools.

**195.** The supporting of inclusive education and the related funding are mainly managed at the central level, by the relevant bodies of the MoE. In addition:

- Municipalities have formal responsibilities towards kindergartens and primary schools (1<sup>st</sup> cycle/lower primary) regarding education funding. They are responsible for providing auxiliary staff, maintaining buildings and assigning/maintaining standard equipment. A significant proportion of education responsibilities is in the process of being transferred to the municipalities.
- There are some contributions from other Ministries, especially the Ministry of Work, Solidarity and Social Security (MTSSS) and the Ministry of Health (MS). These contributions are for areas under their political responsibility which overlap with the MoE. Some collaborations are within the framework of local and informal articulation. Others are within the framework of programmes and measures involving institutionalised partnerships between the above-mentioned Ministries and others. These collaborative partnerships are denser and more continuous when they occur in the context of social inclusion policies, of which inclusive education is naturally a part. These partnerships sometimes extend to local and regional organisations in the community. These would allow the transfer of a greater level of responsibility and autonomy in delivering and managing education at a local level to municipalities. The structural dimensions of the education system however remain at the national level.
- Occasionally, companies and other entities (such as foundations) are also involved, collaborating on, and occasionally launching, inclusive education initiatives and projects.

**196.** In the MoE, school and municipality interventions, there is a good degree of co-ordination. However, there is clear evidence that co-ordination between the different parties requires improvement. Interaction between schools and municipalities may be a positive exception. At this level, there is frequent close interaction, although sometimes it is more an articulation of punctual activities than an effective and systematic co-ordination of plans and interventions.

**197.** The financing of schools and the provision of resources are structured around two axes:

- Costs, including salaries for teachers and other professionals and investment expenditure, supported directly by the MoE, which regularly transfers the required funds to schools.
- Annual budget allocation for each school (with a reduced expression in financial terms) containing MoE funding for the ongoing period. The guarantee that the Ministry of Education remains committed to pursuing inclusive policies is given by the publication of Decree-Law No. 54/2018, of with the changes introduced later with the publication of Law No. 116/2019 emphasising the great effort that has been made in the allocation of more and more resources to the system, notably the increase in the number of psychologists and specialised support staff that have been hired by schools.

**198.** The budget of each school (annual and organised by twelfths) is established by the Institute for Financial Management of Education (Instituto de Gestão Financeira da Educação, IGeFE) according to defined rules /guidelines.

**199.** In addition to the indication of the amounts to be transferred to schools by IGeFE, the DGEstE, within the scope of the school social action, authorises human resources (teachers, specialised support

staff and operational assistants referred to below) according to previously defined needs and upon central authorisation.

**200.** The following paragraphs set out the possible complementary resources:

**201.** Operational assistants / non-teaching staff: Portugal has a law (Ministerial Implementing Order No. 272-A / 2017 in the current wording given by Ministerial Implementing Order No. 245-A / 2020) under which, at the beginning of each year, DGEstE identifies the needs to reinforce the support and monitoring of pre-school children with specific needs. The estimation of needs results from the collection of information from the areas where the child has difficulty and from the areas where the child has potential. Depending on the identified needs, professionals are assigned to schools to reinforce what the school already has. Some of these professionals are hired by municipalities that are already in the process of decentralisation.

**202.** Specific financial contributions from DGEstE, such as subsidies, for specific initiatives, under existing selective or additional support measures. These financial contributions are requested by schools depending on their needs, under the rules defined by Ministry of Education. Some schools are given a small amount for consumables and other specific materials that students need and for which it is not possible to work with standardised materials, such as textbooks.

**203.** Applications for funding from the European Social Fund (ESF) for the organisation and availability of education and training offers. Many of these are selective support measures corresponding to the second level of support measures described above. In Portugal, there have been positive results following the work of psychologists in the school environment, in terms of vocational guidance and psychopedagogical support to students from all teaching cycles, including pre-school education, as well as about backup work throughout the educational community. The management of this educational resource is carried out annually, since the Ministry of Education has provided schools with this technician since 2017, which has proved to be an added value, meeting urgent needs, namely regarding risk and crisis situations. DGEstE has had Human Capital Operational Programme (*Programa Operacional Capital Humano*, POCH) / FSE financing operations to respond to this challenge for several years.

**204.** This reinforcement of psychologists in the education system has proven to be effective in preventing early school leaving, systematic absenteeism, by diagnosing the difficulties that affect learning, to act in a timely manner, identifying and analysing the causes of school failure and proposing measures tending to decrease, including in this context the promotion of an adequate educational and professional orientation of young people.

**205.** Allocation of subsidies and/or provision of support and services by or contracted by municipalities, complementary to those available in schools. To understand the current framework of municipalisation of educational administration, it should be clarified that, in Portugal, the starting point for the exercise of Local Power converges in the municipality (or in the municipium, Roman designation), assuming itself as a physical entity within the division state administrative authority. It is also a territorial unit endowed with legal personality and with a certain administrative autonomy, led by its political and administrative bodies, namely, the Municipal Assembly - legislative body - and the City Council - executive body.

**206.** The Constitution of the Portuguese Republic contemplates, as an integral part of the democratic organisation of the State, the existence of the local municipalities, which essentially aim at the realisation of the interests of their populations, ensuring the provision of services in the various domains essential to the socio-economic progress of localities, such as Education. In fact, the culture of municipalisation has been gradually consolidated since Portugal's entry into the democratic regime that came into force in 1975, with regulatory diplomas, experiences, and operational models for strengthening local power people. Recently, the contracts for the transfer of skills in education were established by (1) Decree-Law No. 144/2008, of 28<sup>th</sup> July, which defines the conditions for the transfer of non-teaching staff from basic schools and pre-school education school; of curricular enrichment activities in lower primary education and of the management of the public school facilities in upper primary and lower secondary education, and (2) the inter-administrative contracts for delegation of competences, signed under Decree-Law No. 30/2015, of 12<sup>th</sup> February, that is, the Approximate Education Programme of Delegation of Competencies

in the Education Area, under the assumption of Approximating the Ministry of Education, the Municipality and the School Groups.

**207.** At the same time, we have seen an increase in the participation of citizens, individually or in associations, in public activities, increasing the civil liability of the school / municipal binomial.

**208.** Another important aspect is related to municipalities becoming progressively strategically involved in the associative process that integrates, not only the individual citizen, but also the association between municipalities to strengthen synergies, complementarities, and experiences about challenges and educational practices. The Municipality, the first territorial reality, or the association of municipalities, increasingly acts as an authentic educational agent and partner of the Ministry of Education.

**209.** Therefore, it can be said that the evolution of local educational policies and the cooperation between the respective educational stakeholders, as well as their stimulation by the Central Government, have helped to convene all stakeholders, as it can be seen in the management of the Municipal Councils of Education (*Conselho Municipal de Educação*, CME). The CME is an essential organ for institutionalising the intervention of educational communities at the municipal level. A legal framework was designed that points to administrative decentralisation in Education. This framework is made of three fundamental normative moments:

- Decree-Law No. 115-A/98 of 4<sup>th</sup> May, which approved the regime of autonomy, administration and management of pre-school and basic and secondary education establishments, with autonomy constituting an investment in schools and the quality of education, accompanied by a culture of responsibility shared by the entire educational community. This normative framework, with cuts from municipal initiative, also foresaw the creation of Local Education Councils (*Conselhos Locais de Educação*, 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.
- Decree-Law No. 7/2003, of 15<sup>th</sup> January, a diploma that had as its main purpose the constitution and functioning of the Municipal Councils of Education, an essential organ of institutionalisation of the intervention of educational communities at the municipal level. This diploma also had as its object the Educational Charter (1<sup>st</sup> generation), a fundamental instrument for organizing the network of education and teaching offers.
- Decree-Law No. 21/2019, of 30<sup>th</sup> January, which, in the field of transfer of competences, reinforces and consolidates the framework for transfers of powers and competences to local authorities.

**210.** The three normative moments recognise the school as a repository of educational policies, based on the construction of its autonomy and the social reality in which it is inserted, its weaknesses and potentialities, without prejudice to the responsibilities of the central and regional levels. The different levels must be equally attentive and cooperative and elaborate the most appropriate response to the challenges that democratic systems impose, especially in the area of the territorialisation of educational policies and practices.

**211.** Imbued with this democratic and democratising spirit, Decree-Law No. 21/2019, of 30<sup>th</sup> January, was created with the purpose of broadening and consolidating the strong tendency of the municipalisation of Education in Portugal. It reinforces the areas that have to some extent already been decentralised, now giving the Municipality new local and inter-municipal competences in the fields of planning, investment, and management of education, with the regulation of the functioning of municipal education councils. Nonetheless, decision power over pedagogical matters remain exclusively at the central level.

**212.** It should be remembered that, as partners of the Central Administration, the Local and Regional Administration were essential in the development of many initiatives, such as:

- the expansion of the national network of pre-school education;

- the construction of school centres endowed with the necessary skills for the qualitative development of educational projects;
- the organisation of school transport and full-time school implementation.

**213.** These responses decisively contribute to the fulfilment of the constitutional guarantee of the right to equal opportunities for access and school success, in full respect for the public service of Education, territorial equity and intercity solidarity and interregional in the planning of educational and training offers, and in the allocation of public resources within the framework of correcting inequalities and local and regional asymmetries, always in a logic of proximity.

**214.** Taking as a starting point the scope of action and responsibility of each stakeholder, Decree-Law No. 21/2019, of 30<sup>th</sup> January,<sup>59</sup> safeguards the relative pedagogical and curricular autonomy of school clusters and non-clustered schools, who can manage a small part of the curriculum of basic and secondary education starting from the basic curricular matrices. Through decentralisation measures, this legal framework also provides for the organisation of the public offer of basic and secondary education that best ensures the fulfilment of compulsory schooling by children and young people of school age and aims at the universality of pre-school education. This solution, in addition to ensuring consistency between the exercise of the competences of local authorities and inter-municipal entities, and the general organisation of the education system, puts an end to the simultaneous exercise of competences of the same nature, in a single organic unit, by different public entities.

**215.** However, the definition of the educational network, in conjunction with municipalities, intermunicipal entities and school clusters and non-clustered schools, most of the decisions related to pedagogical matters as well as the decision on contracting or assigning creation and maintenance, remains within the competences of the Ministry of Education.

**216.** Also noteworthy is the maintenance of the preparation by the Municipal Councils of the school transport plan and the consecration of the participation of intermunicipal entities in the multi-annual planning of the education and training supply network and the continuity in the elaboration of the municipal educational charter as a planning tool - 2<sup>nd</sup> generation educational letters. In the context of Education, the central objective of the elaboration of the Educational Charter is to promote the monitoring of the educational system, to individualise and support the territorial and pedagogical options that best respond to local, regional, and national attributions. This results in an integrated and coherent update of the Municipal Educational Charter, according to their needs to adapt to the socio-cultural realities, also in concert with the Municipal Master Plan, the Municipal Educational Project, the municipality's employability indicators and with the various measures to encourage the offer vocational education, promoting success and school equity.

**217.** 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, except for schools whose education and training offer covers, due to its specificity, a *supramunicipal* territorial area.

**218.** The provision of meals in school cafeterias of establishments in upper primary and secondary education is now, with this Diploma, managed by the municipalities.

**219.** The management, operation, conservation, maintenance, and equipment of school residences that are part of the official network of student residences have now come under the competence of the municipalities. In the same sense, the management and functioning of the modalities of placing students with host families and accommodation provided by private entities, through the establishment of cooperation agreements, also came under the competence of municipal bodies.

**220.** In the logic of the correspondence between the exercise of competences and compulsory education, the competence for the recruitment, selection, and management of non-teaching staff, of all

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<sup>59</sup> See: <https://dre.pt/application/conteudo/118748848> (accessed on 7 January 2022).

levels and teaching cycles, is now ensured by the city councils. Consequently, this competence covers and reinforces the legal and functional mechanisms already experienced in the execution contracts.

**221.** 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 groups of schools and non clustered schools, the competencies of organising the surveillance and security of educational equipment, namely the building and exterior spaces included in its perimeter.

**222.** Finally, the Municipal Education Council, as the maximum expression of territorialisation, is the institutional organ of intervention in each municipality, recognise for its essential role as a territorial instance for consultation and reflection on educational policy. Its composition has now been extended since it includes, in addition to the members who already belonged to it, a representative of the coordination and regional development commissions, a representative of each of the pedagogical councils of the groupings of schools and non-clustered schools and a representative of social and solidarity sector institutions that develop activities in education.

**223.** Sometimes, schools may have and use their own revenues, which they obtain from school fundraising initiatives and collaborations with companies which co-finance specific projects by granting different types of support to schools.

**224.** Furthermore, it is possible to divide funding schemes into three categories:

- **General funding:** Universal support measures. These measures are allocated to schools to provide flexible teaching and learning processes, within the general dynamics of school. The resources are allocated to provide general education to all learners.
- **Throughout funding:** Selective support measures. These measures consist of adaptive and intensified support, allocated to schools for groups of learners at risk of failure who may need additional support. This is complementary to universal support.
- **Input funding:** Additional support measures. These are resources allocated to individual learners in need of intensive additional support. The support is specialised and individualised and responds to specific needs. It is frequently associated with specific conditions of functionality.

**225.** At the school level, the directors of the school clusters are responsible for:

- managing the allocated funds (except for the salaries of teachers and other professionals and investment expenditure, which is directly managed by the MoE).
- monitoring spending.
- reporting the number of learners engaged in school activities and their academic achievement.

**226.** Schools report their annual activities plan and budget to the MoE annually. This report includes the initiatives and activities promoted by the school, the associated expenditures and the learners' academic results. Schools also report periodically on additional funding allocated to them through applications for specific support measures or programmes (such as TEIP or others within the MoE itself). These are sent to the administrative bodies that have approved the initiatives and the associated funding. The reports include the level of accomplishment of the objectives and of the expenditure.

**227.** Municipalities report their annual interventions in terms of activities promoted or supported, the number of learners 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.

**228.** 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:

**229.** The design, management and funding of the education system in Portugal have historically been quite centralised. In recent decades, policy initiatives, programmes and support measures have created

room for local agents, namely schools and municipalities, to intervene with some autonomy. They are able to implement initiatives that aim to promote inclusion and educational success and reduce exclusion and existing performance gaps between learners.

**230.** There are significant changes being prepared to give more responsibilities and competencies in the field of education to local agents, such as local authorities, schools, municipalities, metropolitan areas and specialised organisations (such as the Resource Centres for Inclusion). The aim is to effectively support a more inclusive education 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, CRI and other local organisations. They will also cover European Union funding available to municipalities and metropolitan areas to support inclusive education.

**231.** The funding system for inclusive education supports stakeholders at the territorial, local and school levels to avoid labelling those with the most severe needs. According to decree law 54/2018 it is important to identify the potential and difficulties of each student to find the best answers that come from personal and school success. Thus, resources can be allocated in a logic of facilitating access to the school and the curriculum. It is not a question of labelling the student, but of finding ways to deal with difference, adapting the teaching processes to the individual characteristics and conditions of each student, mobilizing students means that everyone must learn and participate in the life of the educational community.

**232.** The monitoring mechanisms between the Ministry and the school clusters are built on trust. Resource allocation mechanisms give some potential for autonomy and flexibility for school clusters. Nonetheless, resource allocation mechanisms may still foster the labelling of learners, hampered by a prevailing input approach based on learners' difficulties. The support provided by resource centres for inclusion and special education teachers is primarily connected to the needs of individual learners rather than aiming at building the capacities of regular 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.

**233.** There is a need for greater autonomy at community and school levels and for 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.

## 2.2. Targeted resources for equity and inclusion in education

**234.** As mentioned in the previous section, since 2019 (Decree-Law No. 21/2019, 30<sup>th</sup> January - 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 primary education and secondary education, with the exception of schools whose education and training offer covers, due to its specificity, a *supramunicipal* territorial area. In preparing the educational charter, the municipalities, and the government department with competence in the matter must closely articulate their interventions, to guarantee the principles, objectives and technical parameters set out in this Decree-Law regarding the ordering of the educational network, as well as the effectiveness of intermunicipal or *supramunicipal* interest programmes and projects.

**235.** The educational charter is, at the municipal level, the instrument for planning prospective buildings and educational equipment according to the education and training offers that need to be met, to make the best use of educational resources within the context of the demographic and socio-economic development of each municipality. The educational charter is thus the reflection, at the municipal level,



of the planning process at the national and intermunicipal level of the network of education and training offers.

**236.** The school is responsible for managing those resources in such a way that it meets the needs of all learners.

**237.** There are no financial incentives for schools welcoming more diverse student groups. Students shall attend the school of their geographic residence area and no school can refuse a student's registration based on his/her characteristics.

**238.** All schools are required to have disability-friendly access points (Decree-Law no. 163/2007, 8th August<sup>60</sup> - Approves the accessibility regime for buildings and establishments that receive people, public paths and residential buildings).

**239.** The TEIP programme (see section 1.2.2) is a very important measure targeted to people in disadvantaged areas and as a response to the students' needs and expectations. Schools integrated in these challenging contexts can define improvement plans, supported on their realities and on the knowledge of the local contexts, through the reinforcement of their autonomy and of positive discrimination measures to:

- Human resources empowerment.
- Additional human resources (teachers, psychologists, social workers, 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, in order to respond to the fundamental needs of students and to assure their school inclusion.

**240.** Regarding the monitoring process of this TEIP programme, there are regional teams from the MoE that support and provide a close contact with these schools to help them make the necessary adjustments to their commitments, methodologies and improvement actions on behalf of better school achievement for all.

**241.** In the case of children and young people who are beneficiaries or applicants for international protection, during the school year in which the students integrate the education system, and in the following year, if the students who integrate the education system in the last three months of the school year, the School/School Cluster's administration, according to a proposal from the pedagogical council, may choose one of the following situations, (in addition to the provisions of article 12 of Ministerial Implementing Order No. 223-A / 2018, of 3<sup>rd</sup> August, and of article 11 of Ministerial Implementing Order No. 226-A / 2018, of 7<sup>th</sup> August, and No. 235-A / 2018, of 23<sup>rd</sup> August):

- Promote a progressive integration in the curriculum, according to the sociolinguistic profile and the students' school path, in order to reinforce the Portuguese language learning and its development as a means of knowledge for the other subjects of the curriculum. The total weekly workload defined in the national curriculum matrix is, however, mandatory, but with the possibility of flexible management according to the pedagogical technical report defined by the Multidisciplinary School Team for Inclusive Education.
- Develop other modalities and / or intervention projects approved by the school.

**242.** For the application of paragraphs a) and b), point 1, Article 12 of Ministerial Implementing Order No. 223-A/2018, of 3<sup>rd</sup> August, and of article 11 of Ministerial Implementing Order No. 226-A / 2018, of 7<sup>th</sup> August, and No. 235-A/2018, of 23<sup>rd</sup> August: schools have a maximum time credit of 1100 minutes/

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<sup>60</sup> See: <https://dre.pt/application/conteudo/538624> (accessed on 7 January 2022).

week, whenever the number of students covered is equal to or greater than 6, and a maximum time credit of 550 minutes/ week, whenever the number is less than 6.

**243.** For the application of paragraphs, a) and b) above mentioned, schools have a maximum time credit of 1100 minutes / week, whenever the number of students covered is equal to or greater than 6, and a maximum time credit of 550 minutes / week, whenever the number is less than 6.

**244.** In order to facilitate the reception and integration of students with the status of beneficiaries or applicants for international protection, host schools should have multidisciplinary teams. 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.

**245.** 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.

## Chapter 3. Building capacity for diversity, equity and inclusion in the education system

### 3.1. Raising awareness on diversity and inclusion

#### 3.1.1. Raising awareness at the system level

**246.** Since 2017, schools have been implementing the *National Strategy for Citizenship Education (ENEC)*, which highlights the importance of improving values and competences to contribute to an active and informed citizenship to promote a more secure, fair, sustainable and inclusive world. Citizenship education is being implemented in all public and private schools through the curricular component Citizenship and Development. It encompasses 17 domains (see section 1.2.1). Among these domains, some compulsory ones might be highly relevant to raise awareness on diversity-related issues: Sustainable Development, Human Rights, Gender Equality, Interculturality (cultural diversity), Environmental Education and Sexuality.

**247.** The *Students' Profile* is a guiding document that describes the principles, vision, values and competences the country wishes Portuguese students to have by the time they finish compulsory schooling (see section 1.1.2). One of the principles highlighted is *Inclusion* and one of the values is *Citizenship and Participation*.

**248.** Furthermore, since the school year 2019/2020, schools have been implementing the *Plan to Prevent and Combat Bullying and Cyberbullying*<sup>61</sup> in schools, which is associated to the *School Without Bullying. School Without Violence*.<sup>62</sup> This plan considers the fact that all forms of school violence violate the fundamental right to education and that no country can achieve an inclusive and quality education if students are exposed to violence. Other similar plans are as follows:

#### *National Strategy for Equality and Non-Discrimination 2018 -2030 (ENIND)*

**249.** One of the key guidelines in governance at all levels and in all domains, which is a major goal of global and structural action, is the fight against discrimination based on gender, the promotion of equality between women and men, and the fight of discrimination based on sexual orientation, gender identity and expression, and sexual characteristics. The Action Plan to combat discrimination based on sexual orientation, gender identity and expression, and sexual characteristics 2018-2021 (PAOIEC) stands out. One of the objective of the plan is the Promotion of the integration of the theme of OIEC in the ENEC, in educational materials and references, in the training of teaching staff.

#### *Raising awareness on Gender identity and Sexual Orientation*

**250.** Law No. 38/2018, 7<sup>th</sup> August, establishes the right to self-determination of gender identity and gender expression and to the protection of the sexual characteristics of each person. In Article 12 Education and teaching, point 1 - The State must guarantee the adoption of measures in the educational system, at all levels of education and study cycles, that promote the exercise of the right to self-determination of gender identity and expression gender equality and the right to the protection of people's characteristics, namely the development of:

- a) Measures to prevent and combat discrimination based on gender identity, gender expression and sexual characteristics.

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<sup>61</sup> See: <https://www.erte.dge.mec.pt/noticias/plano-de-prevencao-e-combate-ao-bullying-e-ao-ciberbullying> (accessed on 7 January 2022).

<sup>62</sup> See: <https://www.sembullyingsemviolencia.edu.gov.pt/> (accessed on 7 January 2022).

b) Detection and intervention mechanisms on risk hypotheses that endanger the development of children and young people who manifest a gender identity or gender expression that is not identified with the gender attributed at birth.

c) Conditions for the protection of gender identity, gender expression and characteristics, against all forms of social exclusion and violence within the school context, ensuring respect for the autonomy, privacy and self-determination of children and young people who carry out social transitions of identity and gender expression.

d) Adequate training for teachers and other professionals in the education system in the context of issues related to the issue of gender identity, gender expression and the diversity of the sexual characteristics of children and young people, with a view to their inclusion as a process of socio-educational integration.

256. Schools, regardless of their public or private nature, must guarantee the conditions required for children and young people to feel respected according to their gender identity, gender expression and their sexual characteristics.

257. The Classroom Sexual Education's Projects, based on Law No. 60/2009, 6th August, should, among other elements, consider the following purposes:

- The capacity to protect against all forms of exploitation and sexual abuse.
- The respect for the difference between people and for different orientations.
- The promotion of equality between the genders.

#### *Raising awareness on SEN*

**258.** Regarding disabilities, Law No. 46/2006,<sup>63</sup> 28th August, outlaws and punishes discrimination around disability and severe health risk.

**259.** Each year since 2003, there is a competition – *School Alert*<sup>64</sup> – aiming at mobilising the educational community for equal opportunities, non-discrimination, and human rights, in particular the rights of people with disabilities. The work to be carried out by the students, under the guidance of the teachers, must have the principles of the United Nations Convention on the Rights of Persons with Disabilities and the Basic Law of Prevention, Qualification, Rehabilitation and Participation of People with Disabilities as a mandatory reference in the presentation of feasible and innovative solution proposals for schools and communities.

#### *Raising awareness on migration-induced diversity and ethnic groups*

**260.** Portugal has a National Plan for the Implementation of the Global Migration Pact (approved by Council of Ministers Resolution No. 141/2019, August 20th): The MoE, through the DGE, participates in the promotion of this Plan. Specifically, it contributes to achieve some of the measures of the Objective 16 (Empowering migrants and societies to achieve full social inclusion and cohesion): measure 63 – To develop projects to raise awareness of interculturality, mobilising primary and secondary education establishments, higher education institutions and local authorities for this purpose, among others, favouring the integration of international students; measure 68 – To streamline programmes and initiatives to promote interculturality at the national level, promoting the enhancement of cultural diversity and interreligious dialogue.

**261.** Throughout the year, there are also some initiatives from different associations (parents, people with disabilities, teachers' associations, others) and also from the municipalities, universities, to raise

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<sup>63</sup> See: <https://dre.pt/application/conteudo/540797> (accessed on 7 January 2022).

<sup>64</sup> See: <https://www.inr.pt/escola-alerta> (accessed on 7 January 2022).

awareness on issues related to inclusion/exclusion. Very often, the MoE is called upon to participate in those sessions.

**262.** In 2013, the National Roma Communities Integration Strategy (ENICC) was established to bring about improvements to the well-being and integration of Roma people, to encourage mutual understanding and positive interaction and to deconstruct stereotypes. It was approved by Council of Ministers Resolution No. 25/2013, of the 17<sup>th</sup> April, in line with the European Commission Communication “A European Framework for National Roma Integration Strategies up to 2020” of 5<sup>th</sup> April 2011. ENICC provided the necessary framework for dialogue between civil servants, the Roma people and civil society organisations working for and with these communities.

**263.** However, 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 – principally gender equality, knowledge of Roma people and their participation in the implementation of ENICC.

**264.** The Government has therefore decided to review ENICC to adjust its objectives and targets and, consequently, to enhance its impact on the improvement of the living conditions of the people and communities involved. The priority is to improve the schooling and professional integration and living conditions of Roma people in situations of social exclusion, and to recognise and boost intervention in intercultural mediation, improve information and knowledge and combat discrimination against Roma people.

**265.** Along the same lines, the aim is to place the relevance of Roma integration higher up the political and public agenda, and to coordinate the different sectors that promote this integration, by highlighting the central role of local policies in integrating vulnerable Roma communities. The Council of Ministers Resolution No. 54/2018, of the 29<sup>th</sup> 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 “Portugal + Equal”, namely in recognising the specific circumstances of Roma people and their experiences of discrimination, and facilitates compliance with international commitments, such as the 2030 Agenda for Sustainable Development.

**266.** ENICC comprises youth-related measures and the Advisory Group for Roma Communities is formed by representatives of several public bodies that deal with issues concerning young people, namely the Ministry of Education, the Ministry of Employment and Vocational Training, the Ministry of Health, the Portuguese Institute of Sports and Youth, the National Commission for the Promotion of the Rights and Protection of Children and Young People. However, there is a continued lack of awareness and mistrust between the Roma and non-Roma people which create now and then some tension and misunderstandings between Roma and non-Roma communities.

**267.** As Citizenship Education acquires centrality in the curriculum, the schools are intended to elaborate and implement a Citizenship Education Strategy at School and the development of the Curriculum component of Citizenship and Development, integrated in all curricular matrices and school levels, cycles and courses, (inclusion of citizenship domains in core dimensions of civic life).

**268.** The main objective is the construction of a nuanced and intercultural society, in which all people can realise their potential, living harmoniously, in democratic, equitable and fair environments. Interculturality, as one of the 17 domains to explore in the Curriculum component of Citizenship and Development, offers opportunities to welcome diversity and heterogeneity as decisive for the success of students and schools. Thus, the recognition and appreciation of interculturality and diversity as a source of learning and personal and collective development.

**269.** As an educational process, interculturality, invites interaction and dialogue about what is diverse and similar, the awareness that ideas formulated about diversity (people, groups) are based on our own beliefs, learning, experiences and multiple cultural identities that value the existing diversity, resulting in benefits for all - children and youngsters, teaching and non-teaching staff, other education professionals,

administrative and management bodies, families, community), recognizing the richness of cultural diversity as part of the school's educational project.

**270.** Other underlying strength vectors is the promotion of active participation of all children and young people in their own learning path, valuing their cultural heritage and national origins, legal status, and socioeconomic situation, promoting inclusion and educational success of all, as well as developing respect for differences and the establishment of safe, healthy, peaceful, and democratic relationships, of interaction between students and other members of the educational community.

**271.** Therefore, school and society must be aware of the challenges and societal changes, encouraging: the reflection on unconscious bias and subsequent prejudice, preparing new generations for plural and democratic coexistence. The main objective is the construction of a nuanced and intercultural society, in which all people can realise their potential, living harmoniously, in democratic, equitable and fair environments.

**272.** REEI (*Rede de Escolas para a Educação Intercultural*) Programme - Network of Schools for Intercultural Education - is a joint initiative of the High Commission for Migration, I.P. (ACM, I.P.), of the Ministry of Education, through the Directorate-General for Education (DGE), and the Aga Khan Foundation Portugal (AKF Portugal). The Programme develops a network of schools that promote respect for differences and diversity. It takes a community approach. REEI is a dynamic platform for all schools that recognise the richness of diversity and therefore embrace the central tenets of Intercultural Education.

**273.** The pilot phase of this Programme took place during the 2016/2017, 2017/2018 and 2018/2019 school years, encompassing 23 school clusters/schools that did already participate in the Intercultural School Label.

**274.** As a result of the evaluation of the REEI Pilot Project that ended in 2019, in 2020, new terms of reference and governance model were elaborated and agreed between partners: a school with skills, attitudes and intercultural practices; an inclusive and reflective school that values the diversity of the educational community as a learning resource; a participative school that, in cooperation, enriches and is enriched in community, acting under 3 Pillars - organisational culture, curriculum, Community.

**275.** REEI is acting as a working platform for all schools that recognise the richness of diversity and therefore assume Intercultural Education as part of their project. These Schools find, in the Network, space to deepen the reflection on their practice, in interaction and cooperation with each other. A session was held to launch the new REEI for the three-year period 2020-2023, which took place on July 16, 2020, by videoconference. The new 48 members of the Network that have approved the programme to be held in each School were presented, covering Schools in 14 districts, as well as the objectives and methodology adopted for the new REEI cycle.

**276.** It is planned to hold 3 support sessions for each trimester, in sequence until 2023, starting in October 2020: "Regional Meetings with the Schools", in remote sessions format, (values, principles and concepts of Intercultural Education; Interculturality at School, integrated in the Education Strategy for Citizenship at School (EECE), "Short inspiration sessions" (presentation/thematic reflection by invited specialist, to share projects, tools, strategies, perspectives, organisations that can assist REEI objectives), and "Sharing schools practices" (recognition of Intercultural practices by REEI member schools). A technical team ensures the planning, implementation, and evaluation of the Network's activities (REEI).

**277.** A training workshop is planned to be held in 2021, pending its concretisation in the second semester of 2021, due to the approval of the Intercultural Referential proposal that had the collaboration of the High Commission for Migration, I.P. (ACM, I.P.), of the Ministry of Education, through the Directorate-General for Education (DGE), the Aga Khan Foundation Portugal (AKF Portugal) and the Teachers Association for Intercultural Education (APEDI).

**278.** The Intercultural School Label/Award is an initiative that aims to distinguish schools that stand out in promoting projects that recognise and value diversity as an opportunity and learning source for all and promotes the development of school projects that fight against discrimination foster, intercultural dialogue and the inclusion of students from cultural, linguistic, ethnic and religious diversity that currently integrate our society, contributing therefore to prevent early school dropout and educational success. It

has been implemented since 2012 within a partnership involving the Directorate-General for Education - Ministry of Education, the High Commissioner for Migration, I.P. and the Aga Khan Foundation Portugal. The Intercultural School Label consists of a certificate and a digital label to be used in communication documentation.

**279.** Given the new legal framework on national curriculum and specifically on citizenship and development, it was felt as necessary to start the process of revising Intercultural School Label/Award (regulation and form of participation of schools in the initiative) with a view to prepare the 6th Edition to be launched in the present 2021.

**280.** The above-mentioned actions Intercultural School Label/Award and REEI Programme - Network of schools for Intercultural Education cover minorities, but, as above mentioned, not specifically migrants and immigrants or gypsies.

**281.** The media (TV, radio, press) often address thematic issues related to inclusion/exclusion in all its different forms. Recognizing that the promotion, in schools, of School TV, School Radio, Podcast, Photography, Blog, Newsletter, Newspaper clubs, among others, plays an important role in the development of different literacies, the Directorate-General for Education created in January 2020 the network of Information and Communication Clubs, with 179 clubs from public and private education having registered. Through this network, it is intended to promote the dissemination of reference practices, with regard to the use of different technologies in the educational context, thus allowing the dissemination of the work done by students in their educational communities. Training moments are foreseen, focusing on sharing and collaboration.

### **3.1.2. Moving away from labelling**

**282.** Students from ethnic groups and national minorities, such as Roma students, and students with an immigrant background are not characterised by a label. Until the 2018 law on inclusive education, students with SEN were systematically labelled. Today, Portugal is shifting away from the labelling of these students through the use of the category “students in needs of additional support” (which includes the universal, selective or additional measures defined in section 1.2.1). This concept focuses on the type of measure(s) provided to students within mainstream education rather than the personal characteristics of students. This approach is the result of a series of education policy and legal changes.

**283.** According to the Education Act (Law No. 46/86, 14<sup>th</sup> October), special education is a specific type of education that facilitates the socio-educational recuperation and integration of individuals with special needs due to physical or intellectual impairments.

**284.** Including pupils in need of additional support in the mainstream schooling system as an educational strategy was enshrined in Law No. 9/89, 2<sup>nd</sup> May on Prevention and the Rehabilitation and Integration of Persons with Disabilities.

**285.** Decree-Law No. 35/90, 25<sup>th</sup> January, stipulates that learner with special needs/disability resulting from physical or intellectual disabilities are obliged to attend compulsory schooling.

**286.** Law No. 85/2009, 27<sup>th</sup> August, establishes compulsory schooling for children and young people of school age and guarantees the universal right to pre-primary education for children aged five years and upwards.

**287.** Finally, Decree-Law No. 54/2018, of the 6<sup>th</sup> July states that every student has the right to an inclusive education that responds to their potential, expectations and needs within the framework of a common and plural education that must promote equity, participation, and sense of belonging for all learners (more details in section 1.2.1).

**288.** The law reflects a move away from the rationale that it is necessary to categorise to intervene. Rather, it seeks to ensure that all learners reach the *Students' Profile*, even if it is through differentiated learning paths that allow each learner to progress in the curriculum in a way that ensures their educational

success. It implies a continuum of answers for all students; a focus on educational responses rather than student categories; a focus on classrooms as the normal/principal context of student education, to identify and solve problems; a complementary mobilisation of health resources, employment, vocational training and social security and it is designed for all learners, regardless of their diversity/diversities, with a complex and comprehensive set of support measures to schools and students, focused on all kinds of diversities.

**289.** Therefore, in Portugal, the Decree-Law No. 54/2018, of 6<sup>th</sup> July, abandons student labelling. As above-mentioned, this new law abandons categorisation systems for learners, including the 'category' of special education needs. As such, it removes segregation and discrimination based on diagnosis or clinical labels, and special legislation frameworks.

**290.** Exceptions are made for deaf and low vision/blind students since they need the support of specific human and material resources.

**291.** The issues related to students with special education needs are tackled within the different domains, principles, values and competences to be developed within the scope of different curriculum documents.

## **3.2. Management of educational staff in relation to inclusion**

### **3.2.1. ITE**

**292.** Decree-Law No. 79/2014, 14<sup>th</sup> May, amended by Declaration of Rectification No. 32/2014, 27<sup>th</sup> June, determines that a professional teaching qualification is essential to teach in public, private and cooperative education and any structure that provides pre-school, basic and upper secondary education. The same qualification level is demanded to all teachers – Master's degree – in conformity with the principle adopted when changes were made in 1997 to the Fundamental Law on the Educational System.

**293.** The norms that frame initial teacher training programmes approved in Portugal since 2007 are justified by the need to adjust the structure of the training pathways to the three cycles of higher education studies implemented at the European level following the Bologna Declaration (BD). From then on, the route intended to certify teachers' qualifications for all levels of teaching and curriculum subjects is regarded mainly as a process focused on the development of professional competences, through five years consecutive training programmes.

**294.** The Decree-Law No. 79/2014 introduced minor changes in the structure of the 2007's model and reinforced the consecutive nature of the existing training path, which involves two phases: 1) three years of general education (e. g. a bachelor's degree in Education — for candidates who intend to teach in early childhood, pre-school and primary education — or a bachelor's degree in any scientific domain, for candidates who intend to become specialised subject' teachers in lower and upper secondary education); 2) two years of initial professional training (in which the on-the-job qualifying stage can be distributed throughout the whole training process and takes place in a real school setting).

**295.** In accordance with the training itinerary mentioned above all candidates who are successfully qualified for teaching in any level of schooling and curriculum subject are currently certified with a MA degree in Education and Teaching (equivalent to the 2<sup>nd</sup> cycle of studies, as established by the BD framework, which implies attending a programme with a total of 120 ECTS – European Credit Transfer System). In what concerns the time allocated and the workload of the different training components included in such MA programmes, the 2014 regulations define as follows the minimum requirements to which the study plans must comply with: GES – general educational sciences (5 - 15%); SSD – subject-specific didactics (25%); STP – supervised teaching practice (35 - 40%); SMK – subject-matter knowledge (15%).

**296.** The overall universe of initial teacher education (ITE) programmes operating in Portugal during the 2020-2021 academic year covers a total of 150 MA programmes offered by both public and private Higher Education Institutions (HEI), whose distribution is as follows: i) 80 programmes, or 53.4% of the total,



offered by 32 training institutions aimed at qualifying teachers for Pre-School Education as well as for the 1st and 2nd Cycles of Basic Education (i.e. 1<sup>st</sup> to 6<sup>th</sup> grade students), thus supplying the needs of 10 teaching recruitment groups; ii) 70 programmes, or 46.6% of the total, offered by 12 training institutions, which qualify for teaching in 20 recruitment groups (i.e. 3rd Cycle of Basic Education and Secondary Education – 7<sup>th</sup> to 12<sup>th</sup> grade students). In this regard, it is important to note that 47 of these 70 programmes (or 67.2% of the total) are offered by four public Higher Education Institute [HEI] (the University of Lisbon, the NOVA Lisbon University, the University of Coimbra and the University of Oporto). As an example, the next table shows the training programmes which are offered by two public Universities (Coimbra and Lisbon) and are specifically designed to certify and qualify for teaching in the 3rd Cycle of Basic Education and Secondary Education.

**MA 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	2	48
	Biology and Geology								
	Physics and Chemistry								
Physical Education	4	22			2	32	2		
University of Lisbon (Institute of Education)	Portuguese and Latin	3				5	36	3	42
	Portuguese and Foreign Language								
	English and Foreign Language								
	Philosophy	2				3			48
	History								
	Geography	3	18	4	24	5	30	4	48
	Economy								
	Mathematics								
	Biology and Geology								
	Physics and Chemistry								
	Technology (ITC)	5	18	6	24	4	30	1	48
	Arts								
	Physical Education	5	18	6	24	4	30	1	

**297.** The data displayed in the table show for each training programme the number and workload of courses included in the corresponding syllabus, in accordance with the training components previously mentioned (cf. Decree-Law No. 79/2014, 14<sup>th</sup> May). The names and/or designations through which HEI identify their training programmes are usually standardised and refer to the curriculum subject and level of teaching for which the programme grants qualification (e.g. *Master in Geography / History / Portuguese and English [...] Teaching for the 3<sup>rd</sup> Cycle of Basic Education and Secondary Education*).

**298.** Despite being equivalent to at least 60% of the workload allocated to the training process, the number of curricular units which comprise the components of specific didactics and supervised teaching practice (STP) is relatively small, and their attendance is mandatory. While in some training programmes the domain of specific didactics is worked in line with an approach that tends to detach some of its topics (e. g. problem-based learning, ICT), in others, the subject is managed in a more cohesive way. Likewise, as regards the STP component (which always implies the performance of teaching activities in a real school setting), some programmes consider it as a single curricular unit, supported by a follow-up seminar delivered at the training institution, while others, for reasons of mere internal management, tend to split the component into smaller European Credits Transfer and Accumulation System (ECTS) units, which they usually match with courses dealing with research methods in education. An option that can be justified by the fact that to successfully complete the training process all teacher candidates have to publicly present and defend a reflective report on the activity carried out at the school where their teaching skills and knowledge are tested and assessed.

**299.** Regarding the more general training components, the list of subjects is generally broad, despite the relatively small number of courses that the candidate must attend. The courses whose attendance is mandatory usually correspond to the traditional disciplines of the educational sciences (Psychology, Sociology, Curriculum Development and Assessment), with the future teacher also being given the possibility to choose some optional courses, covering a wide range of topics within the domain of education. The existence of such elective options allows candidates to shape their training paths according to different fields of specialisation, a trend that is essential when considering the complexity of the problems that teachers have to tackle throughout their careers. To complete their training, teacher candidates must also attend some elective courses aimed at reinforcing their scientific subject knowledge. While deepening academic training, the specific contents of such courses are not usually determined by the needs of the national curriculum, since they are also part of the study plans of other bachelor and master's degrees on offer in the HEI.

**300.** Since 2007, the accreditation process of all teacher education programmes is conducted by the *Agency for Assessment and Accreditation of Higher Education (A3ES)*. The agency seeks to develop an accreditation system for initial teacher education that does not aim to take away from higher education institutions the power to certify its graduates' teaching qualifications. Still, its role is not envisaged as a mere administrative verification of whether new and existing training programmes meet legal requirements but is also focused on evaluating their adequacy to provide a professional teaching qualification, as well as on assessing the quality of the human and material resources, the training processes and the outcomes achieved.

**301.** Decree-Law No. 240/2001, of 30<sup>th</sup> August, defines the profile of regular teachers, based on the following dimensions and competencies:

- Professional, social, and ethical dimension: the teacher promotes curricular learning, basing his/her professional practice on knowledge, specific result of the production and use of diverse integrated knowledge according to the concrete actions of the same practice.
- Development dimension of education and learning: the teacher promotes learning according to the curriculum domain, within the framework of a pedagogical relationship of quality, integrating, with scientific and methodological rigor, knowledge of the areas that substantiates it.

- School participation and relationship with the community dimension: the teacher carries out his professional activity, in an integrated way, within the scope of the different dimensions of the school as an educational institution and context of the community in which it operates.
- Professional development throughout life dimension: the teacher incorporates his training as a constitutive element of professional practice, building it from the needs and achievements it raises awareness of, through problematised analysis of its pedagogical practice, reasoned reflection on the profession and the use of research, in cooperation with other professionals.

**302.** Preschool, primary and secondary education teachers can specialise in some areas (e.g., special education, counselling, pedagogical supervision, school administration, curriculum development, and so on). This type of training lasts for one or two years and takes place at public or private colleges of higher education. It is equivalent to a post-graduate degree and awards professional qualifications to teachers, allowing them to work in specialised areas.

**303.** In ITE, there is a basic introduction to issues related to inclusive education, still mostly focused on special needs, as well as on understanding and supporting learners with diverse characteristics and additional needs and working with families. Several universities and polytechnic institutions offer master's degrees and continuous training programmes on special needs. This training is developed within the normal academic offers of the institutions and is financially supported by their own budget. The monitoring mechanisms and quality control of the training are the responsibility of either the *Agência de Avaliação e da Acreditação do Ensino Superior - A3ES*, Agency for the Evaluation and accreditation of Higher Education (for curricular and pedagogical criteria), or the institutions themselves (for teaching and certification quality).

**304.** Educational staff working in schools have no specific training in their initial training in managing equity and inclusion of individuals from ethnic groups or national minorities, or from an immigrant background, although some schools may be allowed to recruit more specialised staff (see section 3.2.3 on support staff for inclusion). Training courses / seminars / actions on inclusion for these groups are sometimes available, promoted by different training entities, but are not mandatory in the training of teachers or school leaders. The establishment of networks with different values is important for the work to be carried out, either among the professionals who are in schools, either with other schools, or with elements of the educational community. Some entities such as ACM and the United Nations High Commissioner for Refugees (UNHCR) provide training in this area when needed. Teachers generally cooperate with each other and with psychologists to address diversity and inclusion-related issues within the school. They also cooperate with social workers or other outside members who are somewhat responsible or connected to these students and their families in order to support their inclusion.

### *Special Education Teachers*

**305.** In 2006, a specific recruitment group was created for special education teachers. It was made operational by Decree-Law No. 20/06, of 31<sup>st</sup> January. Before being certified as special education teachers, all teaching staff within this special recruitment group needs to be previously qualified to teach in any level of schooling and curriculum subject (Preschool Education, Primary, Portuguese, Geography, Mathematics, and so on), in accordance with the model presented above, and as stated by the Decree-Law No. 79/2014, of 14<sup>th</sup> May. All qualified teachers who intend to apply to such positions must in advance also obtain qualification as special education teachers by attending training programmes specially designed for that purpose (e.g. a specialised training programme — 250 hours — or alike, acknowledged by the agency that is responsible for accrediting all continuous professional Learning activities nationwide), which must cover the domains of special education needs, as stated in the ministerial order of the Minister of Education No. 212/2009, 23<sup>rd</sup> February. After successfully completing the specialised training, a teacher becomes qualified to apply for a position in one of the recruitment groups associated with special education (RGs 910, 920 and 930).

**306.** According to Ministerial Implementing Order No. 212/2009, it is necessary for special education teachers to have a teaching qualification in any other recruitment groups in addition to specialised training in the area of “Special Education” (*Educação Especial*) as required by the legal framework of specialised training.<sup>65</sup>

**307.** For the purposes of the provisions stated in the Decree-Law No. 27/2006, 10<sup>th</sup> February, a recruitment group is understood to be the structure that corresponds to the specific qualification to teach at a certain level of education, subject knowledge or disciplinary field of pre-school education and basic and secondary education. Given this definition, the recruitment groups were established for the purpose of selecting and recruiting teaching staff in pre-school, basic and secondary education. There are currently a total of 36 recruitment groups allotted in accordance with the different levels of schooling and curriculum subjects. The following table shows the main examples:

EDUCATION LEVEL OF	RECRUITMENT GROUP	ID CODE
<b>Preschool Education</b>	<i>Preschool Education</i>	100
<b>Lower Primary</b>	<i>Lower Primary Education</i>	110
	<i>English as a Foreign Language</i>	120
<b>Upper Primary Education</b>	<i>Portuguese Language and Social Studies/History</i>	200
	<i>Portuguese and French as a Foreign Language</i>	210
	<i>Portuguese and English as a Foreign Language</i>	220
	<i>Mathematics and Natural Sciences</i>	230
	<i>Music Education</i>	250
	<i>Physical Education</i>	260
<b>Secondary Education</b>	<i>Portuguese Language</i>	300
	<i>French as a Foreign Language</i>	320
	<i>English as a Foreign Language</i>	330
	<i>History</i>	400
	<i>Philosophy</i>	410
	<i>Geography</i>	420
	<i>Economics and Accounting</i>	430
	<i>Mathematics</i>	500
	<i>Physics and Chemistry</i>	510
	<i>Biology and Geology</i>	520
	<i>Computing (ITC)</i>	550
	<i>Physical Education</i>	620
<b>Special Education</b>	<i>Portuguese Sign Language (Primary and Secondary Education)</i>	360
	<i>Special Education</i>	910
		920
		930

<sup>65</sup> See Eurydice, National Education Systems, Portugal, Chapter 9.1.: [https://eacea.ec.europa.eu/national-policies/eurydice/content/initial-education-teachers-working-early-childhood-and-school-education-59\\_en](https://eacea.ec.europa.eu/national-policies/eurydice/content/initial-education-teachers-working-early-childhood-and-school-education-59_en) (accessed on January 7 2022).

**308.** Attending an ITE programme designed and offered by any HEI in accordance with the framework established by the Decree-Law No. 79/2014 grants teachers the required qualification to teach in one specific recruitment group, and will also enable him/her to apply either to a temporary vacancy or permanent tenure in that recruitment group.

**309.** Ministerial Implementing Order No. 212/2009, of 23<sup>rd</sup> February, establishes two conditions to become a special education teacher: Professional qualification and Specialisation training (it implies at least five years of previous experience in mainstream education). Decree-Law No. 95/97, 23<sup>rd</sup> April, established the basis for specialised training in special education (among other areas). It must be a programme of at least 250 hours with general training in educational sciences (20%), specific training (at least 60%) and research training.

**310.** According to the Decree-Law on Inclusive Education (54/2018), the role of special education teachers involves:

- collaborative work with the different stakeholders in the learners' educational process.
- direct support provided to learners, which is always complementary to the work developed in the classroom or in other educational contexts.

**311.** All school clusters have special education teachers who work collaboratively with school communities and the students.

### **3.2.2. Professional development to deal with diversity and inclusion**

**312.** In-service training is both a right and a duty and aims at up-grading and up-dating teachers professional knowledge and competences.

**313.** Decree-Law No. 22/2014, of 11<sup>th</sup> February, established the latest legal regime for the training of teachers. In-service training became oriented towards improving the quality of teaching by making the training system focused on priorities identified by the school and its educational community. All teachers should do some training in their area of intervention regularly.

**314.** School clusters define their priorities and needs regarding the domains which are considered relevant to improve teachers' competences and knowledge. Such diagnostic is usually made in close cooperation with the Teachers' Training Centre (*Centro de Formação de Associação de Escolas, CFAE*) to which the school cluster is associated with and is the starting point for the definition and design of the training plan of both the schools and the training centres. However, teachers are free to look for continuous professional learning activities offered by other training centres or training institutions (e. g. HEIs that continuous professional learning courses, modules, etc.). All career teachers with permanent tenure must attend a minimum number of training hours throughout their entire career (usually 50 hours for each period of four years). If this requirement is not met, the teacher cannot fill the conditions established for career progression. All continuous professional learning activities must be also acknowledged by the agency that is responsible for accrediting all continuous professional learning activities nationwide, or they will not be considered valid for career progression. In general terms, teachers are bound to attend at least 50% of the total amount of continuous professional learning activities in the disciplinary field in which they are qualified. This means that they must attend courses, modules and workshops that are directly connected with the learning and teaching process within their field of expertise.

**315.** In a broad sense, teachers' areas of intervention will depend on the tasks to which they are appointed by the school's leadership. Those might change from one year to the next, with the exception of the teaching activities that are at the core of the teachers' functional profile. Teaching activities are determined, on the one hand, by the recruitment group in which the teacher is placed and, on the other

hand, by the *Teaching Profession Career Code*, which states both the teachers' overall functional profile and the specific tasks to which the teacher can be appointed when attaining certain stages of the career (e. g. head of curricular department, external class observation, training supervision and mentoring, project coordination, etc.). Whether or not the teacher decides to attend training activities in some specific areas will therefore depend on the needs' assessment made by the teacher and negotiated with the school clusters' leadership.

**316.** Continuous professional learning is mainly the responsibility of CFAEs associated to school clusters. Their financing is dependent on the MoE funds made available. Decree-Law No. 54/2018, of 6<sup>th</sup> July, states that each school shall recognise the added value of the diversity of its students, finding ways to deal with difference needs, adjusting the teaching process to the individual characteristics and conditions of each student and mobilising the means at its disposal so that everyone learns and participates in the life of the educational community.

**317.** The CFAEs were created in 1992 (Decree-Law No. 249/92, 9<sup>th</sup> November). They draw up an annual or multiannual training plan based on the priorities indicated by the associated schools. A few nationwide continuing training programmes have also been designed by CFAEs in agreement with national training priorities, defined by the MoE,<sup>66</sup> which currently are:

- the promotion of school success;
- the curriculum of basic and secondary education, the guiding principles conception, operationalisation, and assessment of learning, pursuant to Decree-Law no. 55/2018;
- the legal regime for inclusive education, approved by Decree- Law no. 54/2018;
- the Digital Programme for Schools.

**318.** Since before the entry into force of the Decree-Law No 54/2018, DGE provided teachers' trainers training on the new inclusive education framework. It allowed for a high percentage of school stakeholders to share and discuss the underlying concepts and methodological concepts of the new legislative framework. Since 2018, DGE has been promoting several training sessions for school leaderships in inclusive education domain.

**319.** The training offers have, until now, focused mostly on learners in need of additional support. There is a lot of room for improvement through broadening the scope of inclusive education. New responsibilities and roles could be defined for schools and teachers to allow effective and equitable educational institutions and assure quality education for all learners, regardless of their needs.

**320.** Continuous training of directors, teachers and other school professionals is crucial to support them in implementing and achieving the necessary changes. Inclusive education goes beyond having learners in mainstream public schools, it is also a question of educational culture and strategy. Training needs to be further enhanced and transformed. It must support new pedagogical approaches and practices and a new atmosphere in schools, which can support learning and development in an inclusive way, promoting equality in education.

**321.** Capacity-building of those involved in inclusive education, especially school clusters leaders, specialised teachers and teachers, is probably one of the most relevant factors for the successful implementation of inclusive education. The inclusive education approach is a recent paradigm and education policies before the Decree-Law No. 54/2018 were mostly focused on promoting academic results, rather than equality in education.

**322.** Professionals who are part of the multidisciplinary team to support inclusive education (EMAEI) have also been receiving training on inclusive education. The MoE provided this training through

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<sup>66</sup> See: <https://dre.pt/application/conteudo/117982365> (accessed on 10 January 2022).

a highly selected set of trainers to: a) empower professionals for the assessment of learning; b) analyse / reflect on learning assessment tools and practices; c) promote the development of knowledge in the field of assessment of, and for, learning; d) define explicit criteria that serve as benchmarks for decision-making; e) contribute to the adoption of systematic assessment practices as a privileged resource to improve teaching and learning; f) design support instruments for collecting information to support decision-making; g) empower for the creation of mechanisms for self-regulation of learning; h) develop collaborative and reflective work skills among professionals and to solve problems.

**323.** In addition, the new inclusive education framework introduced a train-the-trainer model for continuous professional learning. In each CFAE, there is an increasing focus on creating groups of internal trainers to boost the level of qualifications of educational staff and ensure quality training in the areas identified as priorities by the schools themselves. The quality of training is guaranteed via a variety of regulation mechanisms, such as monitoring activities conducted by the DGAE and external evaluation and is under the responsibility of the Inspectorate (IGEC). This new model of continuous professional learning involves short training courses (recognised and certified by training bodies) that can last a minimum of three hours and a maximum of six hours.

**324.** There is no specific training or recruitment rules for staff members to teach students from an immigrant background and Roma students in schools and classrooms. However, the MoE provides resources and supports projects that promote a multicultural approach. In-service or professional development trainings may be offered to teachers who work with students from Roma communities. It always depends on the school priorities for each school year. Schools who take part in the TEIP Programme usually provide such training opportunities.

**325.** The MoE has issued a set of measures to host immigrants, especially refugees, as well as pedagogical resources to support teachers and school leaders' action, focusing on Portuguese language learning and multicultural approaches.

**326.** There are, finally, no specific mentoring programmes aiming at building capacity for diversity and inclusion, although occasionally training courses/seminars/workshops are available for those who are interested in attending them. Although there are no nationwide mentoring programmes for teachers, collaborative work and joint reflections are encouraged to be developed in schools. In all the structural documents of educational policies (e.g.: Decree-Laws No. 54/2018 and 55/2018, handbook to support inclusive practice), practices of support among teachers are valued and encouraged and the transdisciplinary nature of learning is valued. Overall, these documents promote collaborative and interdisciplinary work between professionals as well as between professionals and students' families and the educational community. DGE promotes training sessions to share experiences, weaknesses and strengths in relation to inclusive practices.

**327.** Overall, preparing all teachers to be inclusive teachers remains an area that requires further improvements, including the following elements:

- Teacher educators need to be prepared to educate all teachers to work with all learners.
- Experienced mainstream class teachers need to be prepared to support teachers who are starting their careers to create inclusive learning environments.
- Specialist teachers need to be prepared to support mainstream class teachers in providing additional support.
- Valuing students' diversity: students' diversity must be considered as a resource and an asset to education.
- Supporting all learners: teachers must have high expectations for all learners' achievements.
- Working with others: collaboration and teamwork are essential approaches for all teachers.

### *Training on ICT*

**328.** The Digital Programme for Schools (see section 1.2.2) is a part of the National Plan for Digital Transition. This measure will actively contribute to schools' technological modernisation, bringing students closer to productivity and collaboration tools that they might find in their future work environment. Within this measure, there is also the Digital Teacher Training Plan (*Plano de Capacitação Digital de Docentes*). The objective is to develop teachers' digital literacy and digital skills, which are necessary for the transversal integration of technologies. These technologies must serve as tools that facilitate professional and pedagogical practices and, simultaneously help promote innovation in the teaching and learning process. Computers are already being distributed to all students, giving priority to the most economically deprived.

**329.** There are several ICT teacher training activities provided for teachers. ICT skills and learning may be applied to all students. A wide range of ICT training courses for teachers are available. Teachers can attend the training courses that best suit their current work. Schools usually offer some optional after-school ICT sessions on specific software. The CFAE also promote several trainings in this domain.

**330.** The national network of 25 ICT Resource Centres (CRTIC) was created in mainstream schools back in 2007/2008. These Resource Centres have an important role (among others) in disseminating information and training teachers, staff, and families in using the assistive products/devices to access the curriculum they recommend which are granted by the Ministry of Education. They provide training on assistive technology on a peer-training basis and in partnership with teacher training centres and specialist companies.

#### **3.2.3. Support Staff for inclusion**

**331.** Besides teachers, all schools have an educational psychologist to support students and community.

**332.** Human resources are recruited by the MoE under the terms of the legislation in force through the DGAE - SIGRHE platform.

**333.** DGEstE defines a network of teachers from special education recruitment groups, as well as specialised support staff in schools in areas that are not supported by a CRI. The network proposal is centrally authorised before being communicated to schools to inform them about available local resources.

**334.** As a rule, the network maintains the resources of the previous year, which are adjusted according to the monitoring carried out and the case-by-case analysis of the locations by the schools.

**335.** According to the provisions of Decree-Law No. 54/2018, when the operationalisation of the measures envisaged implies the need to mobilise additional resources, the school principal must ask for permission to the MoE. However, priority is given to making the most of existing resources in each school and collaborative work.

**336.** Schools, within the scope of their autonomy can always request specialised support staff to the DGEstE whenever they consider that it is necessary to the promotion of measures aimed at the students educational success.

**337.** Additional resources can be allocated by central authorities under certain programme such as the personal, social and community development plans. In this context schools can obtain additional credit hour and recruit specialised support staff such as cultural mediators.

**338.** Since 2008, many special schools have turned into resource centres for inclusion (CRI) to help mainstream schools. They provide specialised support through partnerships with mainstream schools and act as support structures for the inclusion of all students, particularly those with additional needs. This collaboration of specialised professionals, provided by the CRI emanating from the former special schools



accredited and financed by the Ministry of Education, gives support in areas such as: speech therapy, psychology, physiotherapy, occupational therapy. CRI action aims to support the inclusion of students when there is a need to mobilise additional measures to support learning and inclusion.

**339.** Available specialised support staff are the following:

- Special education teachers, who integrate three specific recruitment groups.
- Portuguese sign language teachers.
- Portuguese sign language interpreters.
- Speech Therapist – it requires a Degree (Licentiate) in Speech Therapy.
- Psychologist – it requires a master's degree.
- Physiotherapist – it requires a Degree (Licentiate) in Physiotherapy.
- Emotional-Kinaesthetic Psychotherapist – it requires a Degree (Licentiate) in Emotional Kinaesthetic Psychotherapist.
- Occupational Therapist – it requires a Degree (Licentiate) in Occupational Therapy
- Specialised professionals (such as Speech Therapists, Psychologists, Physiotherapists, others) hired by schools when there is no CRI to ensure the referred support.

**340.** The specialised support staff hired by the Schools through the Personal, Social and Community Development Plans (PDPSC) call, in the school year 2020/2021, came to reinforce the multidisciplinary teams. The main intervention areas of these specialised support staff are Psychology, Speech Therapy, Mediation, Social Work, Arts and Computing/ICT. The PDPSC, designed by 668 schools, integrate in their planning teaching practices conducive to learning in competence areas of the Students' Profile. The action of these specialised staff focuses mainly on areas such as stimulating socio-emotional intelligence, personal development, family involvement, as well as mentoring and tutoring, development of reading, writing and communication skills, community involvement, multiculturalism and citizenship.

**341.** The PNPSE has been privileging proximity action with local authorities and inter-municipal entities, namely in various programmes to combat school failure, such as PIICIE - Integrated and Innovative Plans to Combat School Failure. These plans, which were designed to respond to the uniqueness of each school territory, were articulated with the projects of the schools, reinforcing collective commitment, enhancing synergies and reaching greater efficiency and educational quality. Local entities hired specialised support staff who are part of multidisciplinary teams. These specialised staff articulate and complement their action in specific interventions between the school and the community, intensifying networking and collaboration with community entities and partners, respecting the principle of subsidiarity, efficient management of existing resources and school autonomy.<sup>67</sup>

**342.** Additional staff members working in schools may support the inclusion of students with an immigrant background according to their needs, having no specific training for that purpose. Generally, psychologists cooperate with teachers and social workers or other external members who somehow support those students and their families. There is also work at the level of Portuguese as a non-native language and Portuguese as a host language.

### **3.2.4. Preparation of students**

**343.** As above-mentioned, there are some curriculum guidelines/principles that set the principles, vision and competences that need to be acquired and developed by all students (see section 1.1.2) and for which they are prepared.

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<sup>67</sup> See for example the Information Bulletin of the Integrated and Innovative Plans to Combat School Failure: <https://www.norte2020.pt/educacaoparatodos> (accessed on 10 January 2022).

**344.** One of the recommendations is the development of a mentoring programme. The MoE recommendation for mentoring programmes for children and young migrants and also for refugees and asylum seekers is foreseen within the scope of the measures regarding PL2 provision and the reception of refugees. Indeed, students who are already attending school have the duty to guide newly arrived students, fostering their integration and learning based on peer guidance.<sup>68</sup>

**345.** Students helping students, or peer tutoring, is also becoming one of the ways to promote inclusion. The PNPSE has adopted as its motto "school success is the school natural condition and the permanent design of each educational community". Schools organise themselves to mobilise the different actors and institutions in the communities to build solid partnerships of school convergence, through the creation of contextualised solutions for local educational problems and in the raise of preventive dynamics.

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<sup>68</sup> For more information, please check: Frequent asked questions on Portuguese as a Second Language : [https://www.dge.mec.pt/sites/default/files/Curriculo/EBasico/PLNM/portuguese\\_second\\_language\\_pl2\\_plnm\\_general\\_informati\\_on\\_en.pdf.pdf](https://www.dge.mec.pt/sites/default/files/Curriculo/EBasico/PLNM/portuguese_second_language_pl2_plnm_general_informati_on_en.pdf.pdf) (accessed on 10 January 2022); and the Unaccompanied Foreign Minors - Welcoming Guide: Preschool, Basic and Secondary Education : [https://www.dge.mec.pt/sites/default/files/Projetos/Crianças\\_jovens\\_refugiados/guia\\_acolhimento\\_mena\\_agosto2020.pdf](https://www.dge.mec.pt/sites/default/files/Projetos/Crianças_jovens_refugiados/guia_acolhimento_mena_agosto2020.pdf) (accessed on 10 January 2022).

## Chapter 4. Promoting school-level intervention to support diversity, equity and the inclusion

### 4.1. Matching resources

**346.** All students, including students in need of additional support (except the 1.1% going to special schools), from an immigrant background and from ethnic minorities, attend mainstream classes. They are grouped according to their education level and, when needed, according to their age.

**347.** All students in Portugal enrol in schools according to the same legal criteria, mostly based on residence or, if necessary, on area of study. All children and young people have the fundamental right to education, so all of them have a place. In addition, the Law against Discrimination (Law No. 93/2017, see section 3.1) defines that class composition cannot be based on discriminatory criteria and that the Commission for Equality and Against Racial Discrimination shall guarantee the respect of this principle.

**348.** The current legislation defines that classes should have 20 to 25 students in pre-schooling, 26 in the 1<sup>st</sup> cycle (lower primary education) and 26 to 30 in the remaining cycles (from end of primary education to upper secondary education). The pedagogical criteria on which are based the composition of classes are explicit in the school educational project and internal regulations and must respect children's and young people's heterogeneity. After consulting the pedagogical council, the school leader may also adopt other criteria considered determinant for students' success and drop-out prevention. Other criteria related to information from class directors about the importance of not grouping students can be taken into account. Different class organisations can also be taken into account, as a result of measures decided, for example, on the basis of an innovation plan.

**349.** The class size may be reduced to 20 learners in pre-primary, first, second and third cycle classes as well as in vocational classes when they include students with selective and / or additional measures to support learning and when the technical-pedagogical report identifies the need for including the student in a reduced class. Those classes cannot include more than two students in such conditions. In secondary level classes, the class size can be reduced to 24 students (Legislative Order No. 10-A/2018,<sup>69</sup> of 19<sup>th</sup> June, and Legislative Order No. 16/2019,<sup>70</sup> of 4<sup>th</sup> June).

**350.** The students' distribution per class depends on educational and pedagogical reasons only and not on ethnicity or other personal characteristics. This rule also applies to Roma children and young people. Similarly, criteria for establishing differences in class size or number of teachers relies solely on educational and pedagogical reasons. Schools do not have quotas.

**351.** When a school has at least 10 PL2 students, there are differences in terms of class size or number of teachers available for students with an immigrant background.

**352.** Generally, immigrant students are organised in Portuguese language learning groups according to their age and level of education/qualification. They also benefit from other support measures, such as tutoring projects and additional mentoring. These students are integrated into the Portuguese education system according to the years successfully completed in the country of origin. In the absence of any information and / or document on the student's school previous path, the reference should be the age and the corresponding year of schooling / education level.

**353.** Refugees and unaccompanied minors are also given the opportunity to gradually access the curriculum, valuing the learning of the Portuguese language before attending all the curricular subjects. In the first phase of their integration, these students are allowed to attend only the teaching activities

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<sup>69</sup> See: <https://dre.pt/application/conteudo/115552668> (accessed on 10 January 2022).

<sup>70</sup> See: <https://dre.pt/application/conteudo/122497599> (accessed on 10 January 2022).

that the school considers appropriate for their particular case. These are usually disciplines of a practical or artistic nature, in which they remain with their group (class) and PLNM (PL2). To learn Portuguese, they are placed in a specific group for that purpose. The measures are applied during the school year in which students enter the Portuguese education system. In the case that students enter the Portuguese education system in the last three months of the school year, these measures are implemented during the following year.

**354.** PL2 students usually have good results in PL2 A2 and B1 subject final tests (Year 9) and national final examinations (Year 12). In 2019, students obtained the following results:

- Lower secondary education (year 9):
  - PL2 (PLNM) A2 proficiency level final test - 64 - 100 mark average and 79.6 positive grade percentage;
  - PL2 (PLNM) B1 proficiency level final test - 73- 100 mark average and 95 positive grade percentage.
- Upper secondary education (year 12)
  - PL2 (PLNM) B1 proficiency level national final examination - 153-200 mark average and 92 positive grade percentage".

**355.** Furthermore, upon decision of school leaders, it is possible to have two teachers per subject at the same time and in the same classroom, according to the needs of the group. It is also possible to have a special education teacher or an operational assistant in the classroom to support students with more complex needs.

**356.** Special education teachers and other professionals with specific training, such as Portuguese Sign Language (PSL) teachers and interpreters, are allocated to schools by the Ministry of Education to teach specific areas of the curriculum, such as PSL, Braille or the use of support technologies.

**357.** The regular school day might differ for students who are progressively accessing the curriculum (see section 1.4.). In such cases, schools/school clusters may choose to:

- Promote a progressive integration in the curriculum, according to the sociolinguistic profile of the school and students' school path, in order to reinforce the learning of the Portuguese language as a subject and a means to access other subjects of the curriculum. The total weekly workload defined in the national curriculum matrix is mandatory, but with the possibility of flexible management according to the pedagogical technical report defined by the EMAEI.
- Develop other modalities and / or intervention projects approved by the school.

**358.** Under Greece's initiative for voluntary relocation, Portugal began to welcome the first Unaccompanied Minors (*Menores Estrangeiros Não Acompanhados*, MENA) in July 2020. To enhance their reception and integration, a reception/integration model was specifically designed. Nuno Gonçalves cluster, in Lisbon, was the first school to welcome MENA students and therefore had to develop a specific integration project, becoming this way a reference school.

**359.** Aiming to support diversity, equity and inclusion at the school-level, São Teotónio's School Cluster, in Alentejo, has been developing a specific measure addressed to their students with an immigrant background and with no proficiency in the language of schooling, which represents more than 35% of their students. Besides the offer of the subject of Portuguese as a Second Language, according to the national curriculum in these situations, this school cluster has an innovation plan approved by the MoE in which migrant non-Portuguese speaking students from grades 5 to 9 are provided with a curriculum component called "Glossary". These students belong to their original class attending the general subjects (Arts, Physical Education, English and Portuguese as a Second Language). As long as they do not get the necessary proficiency in Portuguese, they attend "Glossary" classes. This curriculum component comprises the following subjects: History, Geography, Science, Physics and Chemistry and Citizenship and

Development. These subjects can be learned according to the level of linguistic proficiency of each student, using a team of teachers, technological resources and tasks with the specificity of these students in mind. Tasks and activities are assigned by the teachers of the original class, as well as their assessment.

**360.** This measure has proved to foster equity and contribute to these students' inclusion and school performance and has been followed up and monitored by a MoE team (regional team that supports Alentejo's school clusters within school autonomy and curriculum flexibility).

**361.** In all school clusters, the extracurricular activities offer is identical for all students. Extracurricular activities are offered by the schools/school clusters within the scope of their autonomy. Each school/school cluster decides which extracurricular activities should be offered to their students every school year. Their choice is usually based on their school project(s), their students' interests and educational/pedagogical needs.

**362.** Furthermore, if schools/school clusters decide to offer such an option, students can have the possibility to choose a vegetarian menu.<sup>71</sup> Alternative menus for religious reasons can also be served. The offer is mandatory, however, in order to combat food waste, the legislation provides for exempting schools from this option if there is no demand. If demand is reduced, it is admitted that a pre-registration regime for the vegetarian option can be established.

#### **4.1.1. Learning support centres within the school**

**363.** Decree-Law No. 54/2018, of 6<sup>th</sup> July, underlies the creation of a new support structure in each school: the learning support centre. This structure aggregates human and material resources, knowledge and skills, and the competencies of the school. The overall objectives of the learning support centre are the following:

- To support the inclusion of children and youth in the group/class and in the routines and activities of the school, namely through the diversification of strategies to access to the curriculum.
- To promote and to support access to training, higher education and integration in post-school life.
- To promote and to support access to leisure activities, social participation and independent living.

**364.** For students attending compulsory schooling and having additional measures to support their learning, the learning support centre guarantees a response that complements the work carried out in the classroom or in other educational contexts. It might call on the intervention of all educational agents, including the special education teacher. It is part of the continuum of educational responses provided by the school. The main overall goal is to support inclusion.

**365.** The specific objectives of the learning support centre are:

- To promote the quality of student participation in the activities of the class to which they belong and in other learning contexts.
- To support the teachers of the group or class the learners belong to.
- To support the creation of learning resources and assessment tools for the various components of the curriculum.
- To develop interdisciplinary intervention methodologies that facilitate the processes of learning, autonomy and adaptation to the school context.
- To promote the development of structured environments, rich in communication and interaction, which enhance learning.
- To support the organisation of the transition process to post-school life.

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<sup>71</sup> Cf. Law No. 11/2017, of 17<sup>th</sup> April, which sets out the mandatory existence of a vegetarian option in the menus of canteens and public cafeterias: <https://dre.pt/application/file/a/106882392> (accessed on 10 January 2022) and Legislative Order No. 10919 / 2017, of 13<sup>th</sup> December: <https://dre.pt/application/file/a/114347577> (accessed on 10 January 2022).

**366.** The learning support centre encompasses all the existing facilities in the school, particularly the specialised units. Depending on the needs, students may have a support teacher or a special education teacher, working in partnership with the classroom teacher. It is also possible a one-to-one instruction during a part of the school daytime and the support from an assistant. Each school leadership defines: (i) the constitution and coordination of the learning support centre; (ii) the locations for the centre and opening hours; (iii) the human and material resources; (iv) the ways to achieve specific objectives; (v) the forms of articulation between human and material resources, knowledge and skills of the school, namely with regard to the support and assessment of learning; (vi) ways to measure the impact of the learning support centre on the inclusion and learning of all students. The EMAEI is responsible on the monitoring of the activities of the learning support centre.

#### **4.1.2. Learning strategies**

**367.** Schools shall include in their guidance documents the lines of action for the creation of a school culture where everyone finds opportunities to learn and the conditions for the full realisation of this right. The guidance documents, such as the educational project, internal regulations, or annual and multiannual plans<sup>72</sup> must promote the implementation of measures aiming 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.

**368.** According to the new Law on Inclusive education, teachers shall use teaching strategies/pedagogical approaches adapted to the students mobilising the necessary measures to support learning and inclusion.

**369.** The existing education policies and programmes are for all students. The targets and goals are defined by level of education for all (Students' Profile by the End of Compulsory Schooling, Essential Learning; National Strategy for Citizenship Education). However, there are curricular management measures (curricular accommodations; non-significant curricular adaptations and significant curricular adaptations, as defined in section 1.2.1) that can be mobilised according to students' different needs. These curricular management measures are linked to the curriculum adjustments set out in section 1.4. The curriculum adjustments are decided by the EMAEI according to the monitoring and assessment of the students' response to intervention. The table below sets out the different curriculum management measures that can be adopted to respond to students' learning needs.

Curriculum management measures	Definition
Curriculum accommodation	Measures that allow access to the curriculum and to 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 styles of each pupil and to promote their educational success.

<sup>72</sup> Cf. Article 9 of Decree-Law No. 75/2008, 22<sup>nd</sup> April: [https://dre.pt/web/guest/legislacao-consolidada/-/lc/55047675/201707180254/55537887/exportPdf/normal/1/cacheLevelPage?LegislacaoConsolidada\\_WAR\\_drefrontofficeportlet\\_rp=diploma](https://dre.pt/web/guest/legislacao-consolidada/-/lc/55047675/201707180254/55537887/exportPdf/normal/1/cacheLevelPage?LegislacaoConsolidada_WAR_drefrontofficeportlet_rp=diploma) (accessed on 10 January 2022).

Non-significant curriculum adjustments	Measures which do not compromise the learning foreseen in the curriculum documents, which may include adaptations at the level of objectives and contents, by altering their prioritisation or sequencing, or by introducing specific intermediate objectives that allow the achievement of the overall objectives and the essential learning, in order to develop the competences foreseen in the <i>Students Profile By The End Of Compulsory Schooling</i> .
Significant curriculum adjustments	Measures which have an impact on the learning foreseen in the curricular documents, requiring the introduction of other alternative learning, establishing overall objectives in terms of the knowledge to be acquired and the competences to be developed, in order to promote autonomy, personal development, and interpersonal relationships.

**370.** Students with intense and persistent communication, interaction, cognitive or learning difficulties that require specialised resources to support their learning and inclusion may need significant curricular adaptations. These adaptations have an impact on the learning foreseen in the curricular documents and require the introduction of alternative learning strategies. As such, the EMAEI to support inclusive education must establish overall objectives regarding the knowledge to be acquired and the competences to be developed in order to promote autonomy, personal development, and interpersonal relationships of these students.

**371.** All students are entitled to adaptations of the evaluation process (according to Decree-Law No. 54/2018), both for the internal and external evaluation processes. Only students with significant curricular adaptations do not participate in national examinations.

**372.** PL2 measures are applied to newly arrived students in the education system who do not have Portuguese as their mother tongue or who have not had Portuguese as their language of schooling and for whom, according to their school background and sociolinguistic profile, the school considers it to be the most suitable curricular offer.

**373.** Schools/school clusters, within the scope of their autonomy and according to their educational project, may define specific measures for the development of the PL2 subject, such as additional classes, tutoring or mentoring programmes. These specific measures depend on the Pedagogical Technical Report defined by the Multidisciplinary School Team for Inclusive Education for each student, providing an individualised language learning plan and tuition.

**374.** PL2 classes are taught according to the curriculum reference documents, notably the Essential Learning for A1, A2 and B1 language proficiency levels. Apart for the PL2 subject, PL2 students complete both final tests (Year 9) and national final examinations (Year 12) like any other student.

**375.** Moreover, technology is used on a daily basis for all students. There are specific resources for students in need of additional support. These students are entitled to assistive technologies/devices to access the curriculum and to improve participation. How they are used within the classroom must be decided according to the individual characteristics of the student.

### *Individual Education Programme*

**376.** For the students who need *significant curricular adaptations*, an Individual Educational Programme (*Programa Educativo Individual*, PEI) can be designed. A PEI includes the identification and implementation plan of the significant curricular adaptations and integrates the competences and learning to be developed by the student, and the identification of the teaching strategies and the adjustments to be made in his/her evaluation process.

**377.** A PEI also includes other measures to support inclusion, to be defined by the multidisciplinary team and it shall contain the following elements:

- The total number 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.
- The strategies for transition between cycles and levels of education, when applicable.

**378.** 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. The EMAEI includes permanent members and variable members as follows:

- The permanent members of the EMAEI are:
  - An assistant of the school director.
  - One special education teacher.
  - Three members of the pedagogical council.
  - The school psychologist.
- The variable members of the EMAEI are all related to the individual student:
  - the multidisciplinary team coordinator.
  - the coordinator of the school.
  - student mainstream teachers.
  - other specialised support staff who intervene with the student.
  - the parents/guardians.
  - the student.

#### **4.1.3. Non instructional support**

**379.** As mentioned above (section 3.2.3), schools have specialised support staff, such as:

- Portuguese sign language interpreters.
- Speech Therapist.
- Psychologist.
- Physiotherapist.
- Emotional-Kinaesthetic Psychotherapist.
- Occupational Therapist.
- Specialised professionals hired by schools when there is no CRI to ensure support for eligible students (e.g., Speech Therapist; Psychologist; Physiotherapist; Occupational Therapist).

**380.** School psychologists also do career guidance counselling, social workers usually work with the families as well as mediators. Schools, if authorised, can hire specialised support staff as mediators mainly in projects at this level. School psychologists do several guidance tasks throughout the school year. 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 an Individual Transition Plan (*Plano Individual de Transição*, PIT).



**381.** 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.

**382.** The plan is conceived, three years before the age limit for compulsory education, for each young student who attends school with significant adaptations, designed according to the interests, competences and expectations of the student and his / her family, with a view to facilitating the transition to post-school life and complements the individual educational programme.

**383.** In its design, the individual transition plan must involve several professionals (teachers, specialised support staff, ...), and parents or guardians and the student himself. 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.

**384.** 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 their capacity to take part in a professional activity.

**385.** 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 they will do, the competencies required, and, when necessary, the support needed to achieve these tasks.

## 4.2. Engagement with parents and communities

**386.** The General Council (*Conselho Geral*) is the strategic management body responsible for defining the guidelines for the school's activity as well as ensuring the participation and representation of the educational community. This Council has, among other elements, the competence to promote the relationship with the educational community. The school/school cluster leader, the Class Council of Teachers and the coordinator of a school or pre-school education institution (whose mission is to promote and to encourage the participation of parents/legal guardians, of local interests and municipalities in educational activities) are also the main responsible bodies for the interactions with parents/legal guardians and communities.<sup>73</sup>

**387.** Concerning Roma communities, an online educational guide entitled Promoting the Inclusion and the Educational Success of the Roma Communities was published by DGE. It provides educational staff with tools to work with Roma children and young people in formal and non-formal contexts.

**388.** As for specific initiatives and approaches with Roma families, Coruche School Cluster, a school involved in the TEIP programme has been developing since 2010 a measure to address the low engagement of Roma families (8 % of their pupils) in school life, starting with preschool education. With the expected outcomes of engaging and empowering families with regard to the prevention of diagnosed risk, promoting communicative and linguistic skills, as well as interpersonal and social skills (80 % of children between 3 and 5 years old should enrol in the project) and ensuring a better transition to the beginning of compulsory schooling and mainly to foster social inclusion involving families in the process, this school cluster provides joint adult / baby sessions through play and pedagogical activities taking place in vulnerable neighbourhoods in an open environment fostering a closer relationship between families and preschool activities.

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<sup>73</sup> Cf. Decree-Law no. 75/2008, of 22nd April: <https://dre.tretas.org/pdfs/2008/04/22/dre-233009.pdf> (accessed on 10 January 2022), amended by Decree-Law no. 137/2012, of 2nd July: [http://www.dge.mec.pt/sites/default/files/EInfancia/documentos/dl\\_137\\_2012.pdf](http://www.dge.mec.pt/sites/default/files/EInfancia/documentos/dl_137_2012.pdf) (accessed on 10 January 2022), which sets out the autonomy, administration and management regime of pre-school, primary, lower and upper secondary education public institutions.

**389.** Their target groups are Roma children under 3 and aged 3-5. The cluster organises 90-minute-sessions (so-called glass rooms), which take place twice a week involving the presence and participation of family members (especially mothers / grandmothers) under the guidance and facilitation of preschool teachers, social workers and other partners.

**390.** This specific measure addressed to Roma families aims at fostering trust, promoting an inclusive school culture for a better engagement of these families and encourage early intervention to tackle the issue of early school leaving among Roma students.

**391.** The law provides for educational communities and families, as they have different representatives in the General Council. Representatives of parents and guardians are elected at the general assembly of parents and education officers of the school or school cluster, on the proposal of the respective organisation's representative, and, failing these, under the terms to be defined in the internal regulations. In this way, parental participation is promoted.

**392.** The dialogue between teachers and parents or caregivers is essential. Parents/guardians now have a more active participation and collaboration on school activities. Schools privilege and promote different communication channels with families, in order to reach all of them. Better communication with parents often ensures greater and better.

**393.** More generally speaking, parents or guardians, in exercising all their respective powers and duties under the Constitution and the law, have the right and duty to participate and cooperate actively in all matters related to the education of their child, as well as access all information contained in the student's individual school file, in particular regarding measures to support learning and inclusion. They have the right to:

- Participate in the multidisciplinary team's meetings as a variable member.
- Participate in the preparation and evaluation of the technical-pedagogical report, individual educational programme, and individual transition plan of their child.
- Request the review of the technical-pedagogical report, individual educational programme, and individual transition plan.
- Consult the individual school file of their child.
- Overall, have adequate and clear information about their child's education.

## Chapter 5. Monitoring and evaluating diversity, equity and inclusion in education

### 5.1. Monitoring and evaluating equity and inclusion at the system level

**394.** Every five years, the Deputy Minister for Education promotes an evaluation of the implementation of the Decree-Law No. 54/2018 to follow the progress of inclusion in the education system. The follow up of the implementation of the inclusive education law is ensured at the national level by a team that includes elements of the different services with attributions in this area, aforementioned. Members of the national team are designated by the respective members of the Government and may include representatives of the Governments of the Autonomous Regions of the Azores and of Madeira.<sup>74</sup>

**395.** A data structure is in place, under the responsibility of DGEEC, which allows for the establishment of objectives and the design of monitoring processes for Inclusive Education policy measures that are under implementation. In relation to non-tertiary education and in what concerns the issues of how support on learning and inclusion is structured, implemented and monitored, in pre-primary, primary and secondary education in particular, governments and bodies of the Autonomous Regions of Azores and Madeira have full autonomy. Currently, the Legislation and the Questionnaire on support for learning and inclusion are only applied to schools in Portugal Mainland. However, this situation does not prevent that, in a near future, an alignment of legislation and procedures will exist, between Portugal Mainland and its Autonomous Regions.

**396.** A questionnaire on support for learning and inclusion was prepared, coordinated by the Deputy Minister for Education Cabinet and was developed, jointly, by the Deputy Minister Cabinet and the different bodies of the Ministry of Education that have responsibilities in learning support, inclusion, data collections and statistics. The questionnaire aims to:

- To support the implementation of the Educational Policy Measures to Support Learning and Inclusion, through the definition of indicators and the publication of reports supported by data collected through school's responded to an electronic questionnaire and other administrative data.
- To define, in collaboration with the different departments of the MoE, the procedures to access the data, in accordance with the respective attributions of each department.

**397.** The questionnaire is addressed to school heads, and should preferably be answered by people who, in the schools, have particular responsibilities in the area of support learning and inclusion.

**398.** Data is being collected in Portugal Mainland's pre-primary, primary and secondary public schools since the school year 2019/2020. Occasional adjustments to the questionnaire structure and questions and the current COVID-19 pandemic situation, have prevented the public dissemination of its results.

**399.** Data validation and processing is the responsibility of DGEEC; the results of the questionnaire - not yet public - will be made available to the Deputy Minister Cabinet and to the other bodies of the Ministry.

**400.** Currently, the set of indicators that will allow monitoring of learning support and inclusion in Portugal is being consolidated; this set of indicators will be based not only on this questionnaire, but also on other data and statistics made/produced by DGEEC.

**401.** While respecting their autonomy, IGEC monitors and evaluates the inclusive practices of each school. IGEC looks into the composition of classes and the number of students (reduced class) according to the needs identified and sanctioned by the school pedagogical structures. IGEC also analyses class

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<sup>74</sup> The participation of members from the Autonomous Regions in the process of evaluating the implementation of Decree-Law No. 54/2018 is requested on a "consultative" basis - not mandatory - enhancing: a) the sharing of experiences; and b) the possible alignment of legal frameworks for support on learning and inclusion, between Mainland Portugal, and the Autonomous Regions of the Azores and Madeira.

diversity regarding, for instance, students whose mother tongue is not Portuguese, sociocultural background, Roma students, etc., the adequacy between the number of students in the class and the overall needs, as well as how the school organises and manages the curriculum in order to promote the effectiveness of the measures implemented to support learning and ensuring inclusion in education for all.

**402.** The evaluation is the subject of a meta-analysis report to be presented annually to the Government member responsible for education. The first evaluation was already made. The report is under appreciation by the MoE's staff. Even taking into account that the information collected from public schools is still in the validation process, preliminary data at school level is made available to IGEC, for using in its new model of external evaluation activities of the schools. The third cycle of school external evaluation started in May 2019.

**403.** Previously, nine pilot evaluations were performed in May 2018. Individual school reports were delivered and improvement measures for the new evaluation framework were presented. Later, during the 2019/2020 school year, new evaluations started but the programme had to be suspended in March 2020 due to the COVID-19 pandemics and school closure. So far, 68 reports were published and made available on IGEC website.

**404.** In spite of existing structures and measures, the monitoring and evaluation system for inclusive education still needs to be developed. The MoE is committed to designing a monitoring system to assess the effectiveness of the new law in promoting inclusiveness within the education system. DG Reform and the European Agency for Special Needs and Inclusive Education, as technical provider, are supporting the Ministry to achieve this ambitious goal.<sup>75</sup> They will provide specific technical knowledge to design a monitoring system and indicators that are relevant to both the Portuguese education sector in general (schools, teachers, parents) and the national administration (MoE) in particular.

**405.** Moreover, municipalities report their annual interventions in terms of activities promoted or supported, the number of learners 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.

**406.** As a rule, Portugal does not process data on ethnicity. However, to allow the monitoring of the impact of the actions developed within the established goals and expected results of the ENICC, DGEEC prepared and launched (in January and February 2020) an electronic survey to school clusters. The survey was filled by school leaders across Portugal Mainland and results were published in the School Profile of Roma children and students 2018/2019.<sup>76</sup>

## 5.2. Monitoring and evaluating equity and inclusion at the school level

**407.** Monitoring and reporting activities are the responsibility of schools. They follow applicable rules, which are defined by the MoE. Schools shall include in their self-assessment reports the conclusions of the monitoring process on the implementation of curricular measures, resources and support structures for inclusive education.

**408.** EMAEIs, who support the operationalisation of inclusive education, must follow up, monitor, and assess the implementation of the learning support measures. Each EMAEI defines the indicators to assess the effectiveness of support measures from the three different levels (universal, selective, additional). The assessment indicators shall be comprehensive and holistic, with a focus both on the child and on the context.<sup>77</sup>

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<sup>75</sup> See: <https://www.european-agency.org/news/new-agency-collaboration-portugal-within-eu-structural-reform-support-programme> (accessed on 10 January 2022).

<sup>76</sup> See: [https://www.dgeec.mec.pt/np4/97/%7B\\$clientServletPath%7D/?newsId=147&fileName=DGEEC\\_Perfil\\_Escolar\\_das\\_Comunidades\\_Cig.xlsx](https://www.dgeec.mec.pt/np4/97/%7B$clientServletPath%7D/?newsId=147&fileName=DGEEC_Perfil_Escolar_das_Comunidades_Cig.xlsx) (accessed on 10 January 2022).

<sup>77</sup> Several examples of indicators are given in the MoE handbook to support inclusive practice: [https://www.dge.mec.pt/sites/default/files/EEspecial/manual\\_de\\_apoio\\_a\\_pratica.pdf](https://www.dge.mec.pt/sites/default/files/EEspecial/manual_de_apoio_a_pratica.pdf) (accessed on 10 January 2022).

**409.** Although school leaders are responsible for allocating funds and monitoring spending, they are not responsible for reporting on achievements specifically generated by the additional support measures made available to learners. The impact of these measures is assessed by generic indicators used to assess the educational success and overall performance of schools and the education system.

**410.** Among others education indicators currently used, the following can be highlighted:

- Percentage of students in the school who complete the 1<sup>st</sup>/2<sup>nd</sup> cycle of primary education in four/two years (theoretical duration); School results are compared with the results of the set of schools with a similar profile (regarding the socio-economic background of the students' families).
- Percentage of students in the school, with socio-economic support, who complete the 1<sup>st</sup>/2<sup>nd</sup> cycle of primary education in four/two years (theoretical duration). School results are compared with the results of students in the country with a similar profile (regarding the socio-economic background of the students' families) and attending schools with similar percentages of students with socio-economic support.
- Percentage of students who pass the 9th/12th grades national exams, without retention in the initial and intermediate grades of the lower/upper secondary education. School results are compared with the results of the set of schools with a similar profile (regarding the socio-economic background of the students' families).
- Percentage of students in the school, with socio-economic support, who pass the 9th/12th grades national exams, after a course without retentions in the initial and intermediate grades of the lower/upper secondary education. School results are compared with the results of students in the country with a similar profile (regarding the socio-economic background of the students' families) and attending schools with similar percentages of students with socio-economic support.
- Alignment of the scores obtained by the students in the upper secondary national examinations (11th and 12th grades), with the scores assigned to them by their teachers. School results are compared with the results of other schools where students scored similarly on national exams.
- The reality - already highlighted - of enrolling students with specific needs, with access to selective measures, additional measures and therapeutic support in mainstream schools, where they attend classes with their peers without specific needs. For instance, the following international standard indicator is used: Percentage of students with specific needs who, in school, attend the same classes, in the same classrooms, as their peers, for more than 80% of their instruction time.

**411.** These indicators are usually calculated and analysed at at the national level as well as at the regional and municipal levels.

**412.** The operations financed by the ESF / POCH are monitored, exhaustively, with the collection of all the information required by the ESF. DGEStE has digital platforms that the governing bodies access with unique and personal credentials where they place the expense documents and activity records of the financed workers.

**413.** Schools are obliged to organise a Technical-Pedagogical Dossier containing the documents proving the execution of the operation.

**414.** All parts that make up the public procurement procedures related to the co-financed operation must be included in the process, including the respective contracts entered. There must be an Activity Plan including activities, objectives, target groups, expected number of participants, schedule, supporting texts and pedagogical and didactic resources used, for example:

- Support texts, pedagogical and didactic resources consulted (manuals, texts, brochures, to support the activity).
- Sheets and other elaborated materials, including in digital format.
- Description of the techniques and methodologies applied (e.g., in the case of an exploration game, the form of elaboration, the cards and components that integrate it, the way of playing, among others) are presented.

- All activity must be registered through a summary of the activities developed. DGEstE also organises, by operation, its own Technical-Pedagogical Dossier, which must always be updated and available for auditing purposes by the FSE / POCH.

**415.** Every year, schools prepare their accounting report, following the legally defined rules for school management. The reports are approved by the School Cluster General Council, sent to the MoE and made available on the school website. They usually refer to what has been done, the number of learners involved, and some analysis of the results achieved. The links between activities, funds and results, the trends and the cost effectiveness of the support measures implemented are not analysed in a systematic way.

**416.** In addition, the PNPSE leads monitoring activities not only with the school cluster leaders, who are general coordinators of the strategic action plan, but also with the local coordinators directly responsible for each measure to identify difficulties and verify the degree of implementation of the measures, the evolution and progress of these measures and their effects on students' learning. In the strategic action plans (*Plano de Ação Estratégico*, PAEs), the coordinators are school teachers, appointed by the respective director when the PAEs were designed.

**417.** Each measure included in the PAE of each school/school cluster has a coordinator, i.e., a teacher responsible for implementation, monitoring and evaluation. The PAEs are built in a bottom-up logic, meaning that their measures are defined by schools and may cover different areas taking into account the weaknesses identified in the promotion of school success. The strategic actions outlined by the different schools suggest mainly models of organisational and curricular flexibility, collaborative work (namely curricular articulation and pedagogical supervision), socio-behavioural interventions (with emphasis on the action of integrated multidisciplinary teams and on the specific tutorial support), curricular enrichment, learning support and parental involvement.

**418.** Monitoring is carried out based on indicators defined by PNPSE, common to all clusters (percentage of implemented measures, percentage of students with at least one final mark below 3 or 10 [secondary education only] in a subject area in a specific curricular year, retention and dropout rate in a specific curricular year and others defined by each school, related to the specificities of the measures (e.g. number/percentage of students with disciplinary complaints, number/percentage of meetings held, number/percentage of students involved in school activities, number/percentage of activities carried out). The way to collect evidence for these indicators is both quantitative and qualitative, using diversified strategies and instruments (e.g., analysis of statistics collected by schools, analysis of minutes and reports, questionnaires, interviews) and usually centralised in the schools' self-evaluation/ internal evaluation team and periodically reported to the PNPSE Mission Structure.

**419.** The PNPSE 2016-2018 report, which analyses and evaluates the strategic action plan measures, shows a reduction in retention rates in all primary education cycles and in each of the school years the 2014-16 biennium. The rates of variation between the bienniums exceed -25% in the 1<sup>st</sup>, 2<sup>nd</sup> and 3<sup>rd</sup> cycles of primary education, ranging from a minimum of -28% in the 3<sup>rd</sup> cycle to a maximum of -31% in the 2<sup>nd</sup> cycle, with the established commitments being achieved for the three cycles. Data also indicate a trend towards greater equity of school results between schools with PAEki measures, being more accentuated in the 2<sup>nd</sup> and 3<sup>rd</sup> years of schooling, in the 6<sup>th</sup> year and in all the years of the 3<sup>rd</sup> cycle. PAEki measures are the measures directly and indirectly included in the strategic action plan (PAE) of a school in a specific curricular year (ki) of basic and secondary education. E.g., PAEk2 measures are strategic action plan measures implemented in the 2<sup>nd</sup> year of schooling.<sup>78</sup> Indicators considering schools with and without PAEki measures:

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<sup>78</sup> More information on the results achieved can be found in the PNPSE 2016-2018 report: Schools and Communities weaving Evidence-based Education Policies - Report 2016-2018 | July 2019 available at <https://pnpse.min-educ.pt/estudo2> (accessed on 10 January 2022). See in particular pages 14-19 of the executive summary and pages 116-135 of the chapter on Results.

- Percentage of Good and Very Good in Portuguese final marks, in the 1<sup>st</sup> cycle of basic education, in the school years 2016/2017 and 2017/18 (Quality of success in Portuguese language).
- Retention and dropout rates by curricular year.
- Percentage of students in the 2<sup>nd</sup> and 3<sup>rd</sup> cycles with final marks below 3 per curricular year.
- Percentage of students finishing the cycle on time (gains in educational efficacy and efficiency in schools).
- Relationship between school survival in the 3<sup>rd</sup> cycle (cohort rate of cycle completion) and the quality of the results of the schools in Portuguese and Mathematics 9<sup>th</sup> grade national examinations tests, in the 2016/17 and 2017/18 school years.

**420.** Well-being outcomes are not measured.

**421.** Decree-Laws No. 54/2018 and No. 55/2018 provide for the monitoring of their application. In view of the commitment to evaluation, Legislative Order No. 9726/2018<sup>79</sup> designates the teams that are responsible for the monitoring to be carried out with schools and defines their composition and operational terms. Focusing on the dynamics of collaboration, sharing and dissemination of practices and on scientific, didactic and pedagogical training, these teams aim to build and sustain capacity for inclusive education. Under the supervision of the national coordination team, which outlines the monitoring and training plan for all stakeholders involved, a technical team offers support in developing training and information tools, while regional teams are responsible for the establishment, promotion and implementation of networks that will share practices and training opportunities. The national coordinator of the team is DGE.

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<sup>79</sup> See: <https://dre.pt/application/conteudo/116696215> (accessed on 10 January 2022).