



FINANCING POLICIES FOR INCLUSIVE EDUCATION SYSTEMS

Country Report: Portugal





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INTRODUCTION

Frameworking terminology and contents

The terms ‘education’ and ‘education system’ in this report refer to the school-based education system within the context of public education policies, which is the responsibility of the Ministry of Education. It includes private and social sector schools offering public education, under agreement with and with financial support from the Ministry of Education.

All the references and data displayed in this report refer to the public education network under the administration of the Ministry of Education (ME). The text specifically highlights cases where references and data also refer to education provided by private schools under tutelage of, or contract with, the ME and hence serving public education.

The use of the terms ‘school’ or ‘schools’ comprises school clusters and non-clustered schools, the two types of school structures which exist in Portugal.

The schemes, policies and data in this report refer exclusively to mainland Portugal. They exclude the Autonomous Regions of Azores and Madeira, which have autonomy in implementing national policies and managing this implementation.

Occasionally, tables and charts displaying statistics in this report present different data reference points, based on the available information. For example, at times, not all yearly data points are completed. This should be duly considered when analysing and interpreting the data.

The FPIES project is not about inclusive education policy or funding policy evaluation. Rather, the main subjects are financing policies and governance issues. Some interpretation and analysis of data is important to highlight relevant issues concerning the purpose of the project. The information and data presented has the potential to be examined in much more depth.

An overview of the Portuguese education system

The development of a school-based education system as a governmental policy in Portugal has generally followed a similar trajectory to that of most of the countries within its geopolitical context. The context in which it emerged, the direction and important moments in its evolution are similar. This is despite variations in history, the rhythm and intensity of development, institutional options, and some aspects of the policies, as well as in the outcomes attained.

Without presenting an all-encompassing theory of this development, outlining a few milestones provides an overall picture of its trajectory:

- The establishment of education as a State responsibility with a universal scope took place after the Republican Revolution of 1910. Three- to four-year basic education was formally instituted as a right to every citizen, including females (who, up to that point, were not valued as educable).
- There followed a slow but steady evolution of the levels and degrees of education available. A network of high schools was developed in district capitals. Commercial and industrial schools were located in cities and counties with a population and socio-economic dimension deemed significant enough.
- Access to lower-secondary education was widened to include all children and young people, starting with the creation of Preparatory Schools in the 1960s and 1970s.
- Widespread access to basic education was established after the Carnation Revolution of 1974, which put an end to the dictatorial regime in Portugal. The two prevalent but divergent educational pathways (high schools which allowed opportunities to further studies and technical-orientated schools which allowed entry to the labour market) were also unified.
- Compulsory education was increased to successively higher educational levels, up to its recently introduced current status. Compulsory education currently starts at age 6 and ends either at age 18 or upon conclusion of secondary education.

An underlying thread can be distinguished in this trajectory. Starting with the institution of education as a right of the citizens and a responsibility of the State, an evolution took place. It aimed to increase access to education to a wider population and increase the levels of education provided. It culminated in the widespread access to secondary education for all children and young people.

In terms of its institutional design, the Portuguese education system developed around public, private and social sector subsystems, with the partnership between the latter and the Government particularly prominent. At an institutional level, a slow but steady transfer of power and responsibilities from central to local administrations – namely, municipalities – has been taking place in recent years. A plan to substantially deepen this decentralisation process is currently in its final stages of preparation, to be implemented in the very near future.

In recent years, the debate around the education system has shifted from the reach of the education system to the quality of the education provided.

Although there is still clear room for improvement, the Portuguese education system has made substantial progress in recent years. It has surpassed limitations and increased the standards of education that it provides to its learners. This progress can be verified by the key performance education indicators presented in this report, such as rates of compulsory school completion, retentions and early drop-out. In terms of proficiency of the system in key areas of knowledge, Portugal was one of the four countries with the highest progression rates in PISA since its implementation, along with Luxembourg, Poland and Germany.

The development of inclusive education for learners on the fringes of, or even outside, the education system is ethically in line with current political education guidelines. However, it may still be more appropriate to only consider educational integration at this point.

Together with several other indicators, the wide and diverse support measures introduced in the last two decades (and presented further below in this report), highlight a new generation of concerns in the country's educational strategy. It focuses on guaranteeing universal access, full participation and educational success for every learner. There is a clear goal to eliminate any form of exclusion or marginalisation to parallel, special or remedial systems. This was the usual route for learners with special educational needs (SEN) until 2009/2010, when learners with SEN started to attend mainstream schools in their communities.

The Portuguese education system (see Annex 2. Education system in Portugal, 2016) is organised into four levels of education, training and learning:

- Educação Pré-escolar (pre-primary education) for 3- to 5-year-old children: non-mandatory, but the State is committed to providing a pre-primary educational network that can accommodate all children. The goal is to have a universal system in place by 2019.
- School education, which has several levels:
 - Ensino Básico (primary and lower-secondary education (PLSEd)) for 6- to 15-year-old learners: universal, mandatory and free, with three successive cycles: the first cycle lasts four years, followed by a second cycle of two years and a third cycle of three years;

- Ensino Secundário (upper-secondary education (USEd)) for 15- to 18-year-old learners: universal, mandatory and free, structured around a three-year educational cycle;
- Post-secondary: non-tertiary education (technological specialisation courses) lasting one to one-and-a-half years.
- Tertiary education, comprising Universities and Polytechnic Institutes.

Both basic and secondary education can take place within the scope of adult education, at schools, in public vocational training centres or private education and training institutions.

Introduction to the inclusive education system in Portugal

The system

The theoretical foundations widely recognised in inclusive education consider the following to be fundamental principles:

- Education is a universal right and education systems are responsible for guaranteeing access and quality education to each and every learner.
- Education that allows or extends educational segregation and exclusion encourages the discrimination of socially-marginalised groups, causing itself to be a mechanism of social reproduction;
- ‘Inclusive systems provide better quality education for all children and are instrumental in changing discriminatory attitudes’ (Open Society Foundations, 2015).
- Diversity is a natural, structural element of humans, naturally (intensively) present in learners. Education systems must therefore design educational policies and structures which allow for diversity in learners.
- Diversity must be considered when modelling and implementing interventions to support learning, including differentiation and required support.
- Flexibility and autonomy constitute core elements of inclusive educational interventions and management. Diversity must therefore be considered as a crucial element when building and implementing the education system framework.

Recognising and considering these assumptions, the Portuguese education system has gradually and progressively implemented a diverse set of differentiated support

measures. These measures aim to overcome specific problems in the educational strategy. They naturally extend and complement the universal support measures that are integrated in schools' general educational dynamic.

The presentation of the educational support measures implemented in Portugal over the last years is based on the conceptual structure of the FPIES Project. This, in turn, is based on the three-level RTI model (see Annex 3. Resource allocation mechanisms for supporting learners).

In addition to this structure, a subcategory is used for adapted and intensified educational support measures (second level), as the various measures concerned have different natures, despite an underlying common basis. For each support measure the time reference, scope and objectives are presented.

1. Universal support measures

This consists of universal support allocated to schools, providing flexible teaching and learning processes and forming part of schools' general dynamics. This generic support is available to all learners, including those in need of additional support measures. Teachers and schools must consider the learners' diversities and organise the learning process in an individualised, flexible and diverse manner.

Tables 1 to 3 show basic information regarding the Portuguese public education system: the number of learners enrolled in schools, the number of schools and the number of teachers.

Table 1. Learners enrolled in schools in the Ministry of Education public system from school year 2008/09 to school year 2014/15

School level	08/09	09/10	10/11	11/12	12/13	13/14	14/15	% change 08/09 to 14/15
Pre-primary	128,626	127,719	130,743	132,771	131,555	130,404	130,238	1.3
Primary/lower-secondary (PLS) total	923,595	913,367	905,031	894,688	880,111	855,598	832,374	-9.9
PLS cycle 1	406,899	397,874	384,025	376,087	365,348	350,644	344,333	-15.4
PLS cycle 2	210,308	209,897	212,055	206,144	203,031	200,699	188,773	-10.2
PLS cycle 3	306,388	305,596	308,951	312,457	311,732	304,255	299,268	-2.3
Upper-secondary	230,189	236,229	236,980	236,584	236,358	234,622	233,846	1.6
Total	1,282,410	1,277,315	1,272,754	1,264,043	1,248,024	1,220,624	1,196,458	-6.7

Source: Directorate-General for Education and Science Statistics, Ministry of Education

Table 2. Number of schools in the Ministry of Education public system from school year 2008/09 to school year 2014/15

School level	08/09	09/10	10/11	11/12	12/13	13/14	14/15	% change 08/09 to 14/15
School clusters	1,183	1,176	1,074	1,067	808	808	808	-31.7
Schools	8,786	8,443	7,762	7,124	6,756	6,220	5,805	-33.9

Observation: Each school cluster includes several schools

Source: Directorate-General for Education and Science Statistics, Ministry of Education

Table 3. Teaching staff, per cycle of teaching, in Ministry of Education public schools 2008/09 to school year 2014/15

Teaching level	08/09	09/10	10/11	11/12	12/13	13/14	14/15	% change 08/09 to 14/15
Pre-primary	9,035	8,830	8,887	8,411	8,187	7,887	7,895	-12.6
Primary/lower-secondary (PLS) cycle 1	28,558	28,239	26,947	24,768	24,335	22,833	22,673	-20.6
PLS cycle 2	28,507	29,687	28,758	26,217	21,907	19,523	18,921	-33.6
PLS cycle 3	76,734	76,353	75,245	70,113	63,215	59,781	60,650	-21.0
Special education	3,949	5,252	5,524	5,909	5,845	5,737	5,783	46.4
Total	146,783	148,361	145,361	135,418	123,489	115,761	115,922	-21.0

Source: Directorate-General for Education and Science Statistics, Ministry of Education

The data presented above shows a significant reduction in the number of learners in Portugal in recent years. This is accompanied by a reduction in the number of schools in the public education network and a reduction in the number of teachers. At same time, Table 3 shows a significant increase in the number of special education teachers. This is a consequence of the implementation of the inclusive education policy and of the political support and priority given to this new educational approach.

The correlation between rates of reduction in the number of learners, schools and teachers is not linear, and should therefore be a subject of analysis.

The data shows an evolution that reflects the management of the country's public expenditure structure. There has been a significant reduction in the budget for education since 2011/2012, arising from an exceptional period of economic crisis in Portugal.

2. *Selective support measures*

These measures include support of an adaptive and intensified nature allocated to schools and complementary to the supports of universal scope. The measures allow adaptation of and support to the learning processes for learners or groups of learners at risk of failure.

a) Support measures related to the socio-economic conditions in the schools' locations.

i. Priority Intervention Educational Areas Programme (TEIP)

The first generation of the TEIP programme was implemented in the 1996/1997 school year. The third generation which is currently in place started in 2012/2013. It includes 137 school clusters located in areas with high levels of poverty and social exclusion, identified by educational with socio-economic indicators. Its objectives are:

- to improve the quality of learning and educational success;
- to reduce early school leaving, absenteeism and indiscipline;
- to strengthen educational guidance and transition to labour;
- to promote co-operation between schools and partners in the community.

With the support of the ME, schools in the TEIP programme implement a three-year Improvement Plan focussed on four areas or axes of intervention:

- improvement of teaching and learning;
- prevention of early school leaving, absenteeism and indiscipline;
- school management and organisation;
- relationship between school, family and community.

ii. Programme Choices (PE)

Implemented in 2001, this programme is now in its sixth generation. It targets 6- to 30-year-olds in vulnerable social and economic situations. This includes descendants

of immigrants and Roma communities (projects in Portugal) and Portuguese emigrants (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. ‘Measure 1: Education and Training’ aims to contribute to school inclusion and to non-formal education, as well as to vocational training and qualification.

b) Measures relating to curricular adjustments.

These aim to prevent and combat the failure and early school leaving of learners who experience difficulties in the framework of the standard educational offer.

i. Education Training Courses (CEF)

Implemented in the school year 2004/2005, CEF are aimed 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.

The 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.

ii. Distance learning (ED)

Drawing on a previous educational provision entitled Escola Móvel (Mobile School) in 2005, distance learning formally became an official educational provision through legislation in 2014. It aims to adapt an educational and training offer to learners for whom face-to-face teaching is not possible. A virtual system 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.

It 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 through to secondary education. It provides an organisational, curricular, pedagogical and learning structure suitable for this type of teaching, functioning on a b-learning model.

iii. Alternative Curricular Pathways (PCA)

Alternative Curricular Pathways were implemented in 2006. They are a specific educational provision for exceptional circumstances and require prior authorisation from the Ministry of Education. These pathways are targeted at learners who have repeated years in the same cycle and are at risk of early school leaving or experience school or social exclusion.

Alternative Curricular Pathways are adapted to the profile and specific needs of each learner. They form part of a reorientation strategy of the learner's educational path, aimed at integration into mainstream or diversified education.

iv. Education and Training Integrated Programme (PIEF)

Created in 1999, the Education and Training Integrated Programme is also an exceptional measure for learners up to 15 years old in a drop-out situation. It has been redesigned throughout the years. It aims to reintegrate learners into education and to promote the completion of compulsory education and/or integration in the labour market. Each learner is specifically targeted through the development of an Individual Education and Training Plan.

v. Vocational Courses – Lower-Secondary Education (CVNB)

The basic level vocational courses are targeted at learners up to 13 years old who have been retained in the same grade at least twice in the same educational cycle, or who have up to three grade repetitions in their education history.

The courses were implemented as a pilot in 2012/13 and have been extended since the 2013/14 school year. The provision favoured the acquisition of knowledge in core subjects, namely Portuguese, mathematics and English, as well as a first contact with different vocational activities. It also included the involvement of enterprises and other partners, who provided simulated practice suitable to the learners' age and the development of the required vocational area. Inspired by the dual learning model, this educational offer was discontinued in 2016/17 and replaced by other educational measures, namely the ATE.

vi. Vocational Courses – Upper-Secondary Education (CVNS)

Secondary vocational courses are aimed at learners aged 16 and over, particularly those at risk of dropping out from school. Having completed their basic education, these learners seek alternatives to vocational secondary education and mainstream secondary education and are interested in a professional qualification.

These courses were created as a pilot in 2013/14 and have been extended to other schools in the 2014/15 school year.

Besides an academic qualification, namely the completion of the secondary level, these courses provide a professional certificate, level 4 of the National Qualifications Framework. They include a component of training in a work environment, providing learners with some work experience. Also inspired by the dual learning model, the current political option is to disconnect this offer from educational failure, and instead consider it as a general education offer.

vii. Portuguese as a non-native language (PLNM)

This support measure launched in 2005. It was established in 2006 for primary and lower-secondary education and in 2007 for upper-secondary education. It aims to ensure equal opportunities for all learners with a mother tongue other than Portuguese. It does this through the creation of equal conditions for access to the curriculum and educational success, regardless of language, culture, social status, origin or age. This measure supports the learning of the Portuguese language through the provision of ‘Portuguese as a non-native language’ (Português Língua Não Materna – PLNM) lessons. After an initial interview and placement tests, learners placed at A1, A2 or B1 language proficiency level in Portuguese follow the PLNM curriculum, which is based on the CEFR benchmarks. These learners can also benefit from adjusted assessment criteria, specific to the subject of PLNM.

- c) Measures of intervention, scope and pedagogical adequacy, orientated towards reinforced support for learners with learning difficulties.

i. Study support (AE)

Implemented in 2012/13, this consists of supporting study in the first and second cycles of basic education. It works as an early follow-up of learners with learning difficulties. It is mandatory for learners in the second cycle for whom the class councils consider it appropriate, based on their learning outcomes. It is a pedagogical support, in class or on a one-to-one basis. It is made available to learners with difficulties in their learning, who require pedagogical reinforcement to enable successful progress through their education.

ii. Programme for the Promotion of School Success (PMSE)

This programme was in place from 2009/10 to 2012/13. It aimed to promote the improvement of learners' school outcomes through the development of typologies of work and the organisation of educational activities such as Phoenix, Plus Class and Hybrid.

iii. Methodologies for the Promotion of School Success (MMSE)

In 2014/15 and 2015/16, the ME allocated additional credits to group of School Clusters who wanted to reduce retention and promote educational success. They implemented plans which included the constitution of 'homogeneity groups' within the framework of the More Successful School methodologies (named Fénix and TurmaMais). These School Clusters (42 and 36 in the first year and 36 and 6 in the second year) were selected based on indicators of educational effectiveness, risk of drop-out, bad behaviour and school violence.

iv. Learners with refugee status and asylum seekers (AERRA)

In force since 2015/16, this programme aims to welcome and integrate migrant learners in Portuguese schools, promoting their progressive integration into the national curriculum and their educational success. It reinforces support for Portuguese language learning as an object of study and as a language of schooling and provides specific educational measures. These include facilitating the process of academic degree recognition, progressive integration in the curriculum, reinforcement of Portuguese language learning and School Social Assistance (ASE).

v. Specific Tutorial Support (ATE)

Implemented in 2016/17, this consists of close support for 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 reduce retention, early school leaving and consequently promotes educational success, complementing other existing measures.

- d) Measures that respond to challenging circumstances in the social, economic and functional context of learners' families.

These circumstances may jeopardise access to, participation and success in learners' education.

i. School Social Assistance (ASE)

Implemented in 1971, the granting of school social assistance aims to prevent social exclusion and school drop-out. 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.

ii. Commissions for the Protection of Children and Young People in Danger (CPCJ)

Implemented in 2001, this succeeded the Commissions for the Protection of Minors that emerged in 1991. The CPCJ 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 services of the Ministry of Education, preferably a teacher.

Indicators and data on achievement

The tables below show the available data on implementation levels and achievement indicators for the above support measures. They do not cover all the existing types of support, only those which it was possible to identify at this stage.

Table 4. Learners, classes and schools involved in the Priority Intervention Educational Areas Programme (TEIP) from school year 2007/08 to school year 2016/17

Learners, classes and schools	2007/2008	2009/2010	2012/2013	2016/2017	Variation 07/08 to 16/17
Total learners	1,311,979	1,314,491	1,254,767	1,164,278	-11%
TEIP learners	46,401	135,999	183,292	177,232	282%
% TEIP learners	3.54	10.35	14.61	15.22	12pp*
Total classes	74,893	72,544	63,739	61,919	-17%
TEIP classes	2,494	7,424	9,451	9,677	288%
% TEIP classes	3.33	10.23	14.83	15.63	12pp
Total school clusters	1,183	1,195	913	811	-31%
TEIP school clusters	35	105	137	137	291%
% TEIP school clusters	2.96	8.79	15.01	16.89	14pp

*(percentage points)

Source: Directorate-General of Education, Ministry of Education

The data presented show an impressive and continuous increase in the number of learners, classes and school clusters covered by the TEIP Programme over the period. This is despite an overall reduction in learners, classes and school clusters in the general education system.

The tables below show the data regarding curricular adjustment measures aimed at preventing and combatting failure and early school leaving for learners who experience difficulties in the framework of the standard educational offer.

Table 5. Learners enrolled in adapted education offers in public schools – Ministry of Education (available data) from school year 2008/09 to school year 2014/15

School level	08/09	09/10	10/11	11/12	12/13	13/14	14/15	% change 08/09 to 14/15
Lower-secondary (LS) total	29,978	27,006	27,538	28,226	24,128	25,729	27,833	-7.2
LS Education Training Courses (CEF)	29,978	27,006	25,232	25,228	19,497	12,580	4,124	–
LS vocational courses	–	–	–	–	195	8,783	19,547	–
LS alternative curricula (PCA) and Integrated Education and Training Programmes (PIEF)	–	–	2,306	2,998	4,436	4,366	4,162	–
Upper-secondary (US) total	1,589	461	417	560	428	401	1,482	-6.7
US CEF	1,589	461	417	560	428	75	–	–
US vocational courses	–	–	–	–	–	326	1,482	–
Total	31,567	27,467	27,955	28,786	24,556	26,130	29,315	-7.1
% of total enrolled learners	2.5	2.2	2.2	2.3	2.0	2.1	2.5	–

Source: Directorate-General for Education and Science Statistics, Ministry of Education

Table 6. School Social Assistance (ASE) for learners in the second and third cycles of lower-secondary education and upper-secondary education, in education and training courses aimed at young people and in Ministry of Education public schools, school year 2014/15

Education or training course	Total learners	Non-ASE beneficiaries	% non-ASE	Total ASE beneficiaries	% total	Bracket A ASE beneficiaries	% A	Bracket B ASE beneficiaries	% B
Mainstream school	627,934	373,319	59.5	254,615	40.5	145,972	57.3	108,643	42.7
Special artistic school	3,328	2,642	79.4	686	20.6	358	52.2	328	47.8
Vocational courses	21,029	8,702	41.4	12,327	58.6	8,840	71.7	3,487	28.3
Alternative curricular path	4,014	1,641	40.9	2,373	59.1	1,952	82.3	421	17.7
CEF courses	4,124	2,259	54.8	1,865	45.2	1,335	71.6	530	28.4
Professional courses	61,458	40,336	65.6	21,122	34.4	11,873	56.2	9,249	43.8
Total	721,887	428,899	59.4	292,988	40.6	170,330	58.1	122,658	41.9

Source: Directorate-General for Education and Science Statistics, Ministry of Education

The data presented in Tables 5 and 6 shows the number of learners involved in the support measures described above, in absolute and relative terms. They highlight the changes that have occurred during the evolution of the measures, as a consequence of the political changes to education in the time period presented. Data relating to the implementation of some of the new adopted measures and the extent of implementation of measures from the last two years is not currently available.

An important aspect highlighted in the data above is the significant percentage of learners who need the support of the school social assistance in brackets A and B. This support includes guaranteed free school materials and services associated with the access and participation of learners in compulsory education, which contribute to the success of their educational path.

3. Additional support measures

Specialised and individualised support which responds to specific needs, frequently associated with the condition of functionality, is integrated into individual education plans.

The target groups are learners with significant limitations in terms of activity and participation in one or more areas of life due to permanent functional and structural issues, which result in continued difficulty in terms of

communication, learning, mobility, autonomy, interpersonal relationships and social involvement. The need for special educational support is provided by school and school cluster administration and management. After referral, the executive council requests that the special education school department assesses the referred children and young people. The objective of the assessment is to collect information that allows verification that it is a permanent special educational needs situation and the provision of guidance for drawing up an Individual Education Programme (European Agency, 2017).

After the assessment, an official decision is made as to whether the learner has SEN and whether they are eligible for additional support measures.

In the 2009/2010 school year, following Decree – Law 3/2008, the education of learners with special educational needs began to take place in general educational contexts. Special schools were mobilised and collaborated with schools in the community to ensure that specialist knowledge and experience was retained in the general school system. The special schools were converted into resource centres for inclusion (CRI). Today, only a few remain as special schools, covering 1.2% of learners with SEN.

To make this inclusion viable, educational measures were created and specialised support was made available. This enabled the education process to be adapted to the needs of learners with SEN in order to ensure their educational success and their transition to post-school life.

The adequacy of the educational process is measured according to the following:

- personalised pedagogical support;
- individual curricular adaptations;
- adjustments to the enrolment process;
- adjustments to the evaluation process;
- individual specific curriculum;
- assistive technologies.

Adaptations may also be made to the organisation and functioning of teaching and learning activities in schools, depending on the complexity and specificity of the learners' needs. There exist:

- reference schools for the bilingual education of deaf learners;
- reference schools for the education of blind and visually-impaired learners;

- structured teaching units for the education of learners with autism spectrum disorders;
- specialised support units for the education of learners with multiple disabilities and congenital deaf blindness.

Assistive products (technical aids) are made available to enable participation in the teaching and learning process. They are evaluated and prescribed by the Information and Communication Technology Resource Centres for Special Education (CRTIC), which has 25 centres throughout the country.

Since 1984, textbooks adapted in Braille and audio format have been made available to learners with altered sensory functions.

The Ministry of Education, together with health and social security services, provides support in early childhood intervention for special educational needs referral and to support pre-school and school development.

To ensure specialist support in schools for learners with SEN, for teachers and for other professionals and families, the following are available:

- special education teachers, who integrate three specific recruitment groups;
- the collaboration of specialised professionals, provided by the Resource Centres for Inclusion (CRI), emanating from the former special schools. These are accredited and contracted by the Ministry of Education and provide a specialised support network to schools;
- specialised professionals to support the bilingual education of deaf learners;
- specialised professionals hired by schools when there is no CRI to ensure the referred support.

One of the fundamental pillars of the strategy for the inclusion of learners with SEN in public schools is the specialised professional support of the CRI. After an accreditation process by the Ministry of Education for this purpose, the CRI have 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 with SEN;
- support for the implementation of curricular enrichment activities (specific programmes, adapted sport practice, etc.);

- support in the development, implementation and monitoring of Individual Education Programmes (PEI);
- development of specific responses in promoting education:
 - Psychological counselling
 - Speech therapy
 - Occupational therapy
 - Psychomotor rehabilitation and physical therapy
 - Braille teaching
 - Visual training, guidance and mobility
 - Teaching of LGP (Portuguese Sign Language);
- support for the transition of young people to post-school life, particularly in the development and implementation of Individual Transition Plans (ITPs);
- support for integration into supported employment centres and occupational activity centres (EACs);
- development of family support assistance;
- production of materials to support the curriculum in accessible formats;
- support for the use of adapted materials and assistive technologies.

The tables below contain data related to the indicators of implementation of these additional supports. They refer generically to:

- the number of learners officially certified as having special educational needs in relation to the total school population;
- the types of schools they are enrolled in and the context of the enrolment;
- the types of additional support provided.

Table 7. Learners with special educational needs enrolled in mainstream schools, by school level and study cycle, and in special schools from school year 2010/11 to school year 2016/17

School level	10/11	12/13	13/14	14/15	15/16	16/17	Variation 10/11 to 16/17
Total	46,950	62,100	65,000	76,331	79,203	82,667	76.1%
Public schools	43,248	58,064	60,610	66,425	68,608	71,406	65.1%
Pre-primary	2,518	2,676	2,447	2,710	2,349	2,094	-16.8%

School level	10/11	12/13	13/14	14/15	15/16	16/17	Variation 10/11 to 16/17
Primary/lower-secondary (PLS) total	37,938	50,246	51,860	56,233	57,187	58,666	54.6%
PLS cycle 1	15,432	19,410	19,251	21,426	20,488	19,833	28.5%
PLS cycle 2	10,675	13,751	14,627	15,510	15,479	15,956	49.5%
PLS cycle 3	11,831	17,085	17,982	19,297	21,220	22,877	93.4%
Upper-secondary	2,792	5,142	6,303	7,482	9,072	10,646	281.3%
Other mainstream schools (public schools with dual supervision and private schools)	2,147	2,692	3,047	8,735	9,567	10,266	378.2%
Special schools	1,555	1,344	1,343	1,171	1,028	995	-36.0%
% learners with SEN in mainstream schools	96.7	97.8	97.9	98.5	98.7	98.8	2.1pp

Source: Directorate-General for Education and Science Statistics, Ministry of Education

Table 8. Learners with SEN enrolled in Ministry of Education public schools relative to the total number of learners enrolled from school year 2010/11 to school year 2016/17

Learners	10/11	12/13	13/14	14/15	15/16	16/17	Variation 10/11 to 16/17
Total learners	1,272,754	1,248,024	1,220,600	1,196,458	1,242,824	–	-2.4%
Learners with SEN in mainstream schools	43,248	58,064	60,610	66,425	68,608	71,406	65.1%
% learners in mainstream schools with SEN	3.4	4.7	5.0	5.6	5.5	–	2.1pp

Source: Directorate-General for Education and Science Statistics, Ministry of Education

Tables 7 and 8 show there has been a straightforward change in the Portuguese education system regarding the education of learners with SEN. The number of learners with SEN included in mainstream schools is increasing and is very high (98.8% in 2016/2017). At the same time, there has been a reduction in the total number of learners enrolled in public schools, with a corresponding decrease in special schools (1.2%). The increase in the total number of learners with SEN considered across the period is currently under review, as it is evidence of a less careful use of the concept and of the support measures available. There has been a significant increase in the number of special education teachers, in parallel with a significant decrease in the overall number of teachers in public schools (Table 9). Despite this, the average learners with SEN per teacher has also increased (Table 10), which might be affecting the effectiveness of the delivered support delivered.

Table 9. Special education teachers in Ministry of Education public schools from school year 2008/09 to school year 2016/17

Teachers	08/09	09/10	10/11	11/12	12/13	13/14	14/15	15/16	16/17	% change 08/09 to 16/17
Primary, lower- & upper-secondary ⁽¹⁾	133,799	134,279	130,950	121,098	109,457	102,137	102,244	103,922	102,620	-23.3
Special education	3,949	5,252	5,524	5,909	5,845	5,737	5,783	6,384	6,342	60.6

Observation: ⁽¹⁾ This does not cover early childhood educators or vocational school trainers

Source: Directorate-General for Education and Science Statistics, Ministry of Education

Table 10. Number of learners with SEN in relation to special education teachers in Ministry of Education public schools from school year 2008/09 to school year 2016/17

Learners and teachers	08/09	09/10	10/11	11/12	12/13	13/14	14/15	15/16	16/17	% change 10/11 to 16/17
Learners with SEN	–	–	43,248	–	58,064	60,610	66,425	68,608	71,406	65
Special education teachers	3,949	5,252	5,524	5,909	5,845	5,737	5,783	6,384	6,342	15
Average learners per teacher	–	–	7.8	–	9.9	10.6	11.5	10.7	11.3	45

Source: Directorate-General for Education and Science Statistics, Ministry of Education

Table 11. School clusters and non-clustered schools in the Ministry of Education public network supported by Resource Centres for Inclusion (CRI) from school year 2010/11 to school year 2014/15

Schools and clusters	10/11	12/13	13/14	14/15	% change 10/11 to 16/17
School clusters/non-clustered schools	1,074	808	808	808	-24.8
With CRI support	498	477	540	574	15.3
Without CRI support	576	331	268	234	-59.4

Observation: School year 2015/2016: data on the number of clusters of schools/non-clustered schools is preliminary.
 Source: Directorate-General for Education and Science Statistics, Ministry of Education

The number of learners with SEN attending segregated settings in mainstream schools (shown in Table 12) needs careful analysis. It is evidence of limited inclusion. There is a clear need for future developments to consider how to deal with very complex educational and health needs in an inclusive education approach. How can learners' classes in the normal educational context be combined with other activities developed in complementary spaces?

Table 12. Learners with special educational needs enrolled in Ministry of Education public schools but attending segregated settings from school year 2010/11 to school year 2016/17

Learners with SEN	10/11	12/13	13/14	14/15	15/16	16/17	% change 10/11 to 16/17
Attending mainstream Ministry of Education public schools	43,248	58,064	60,610	66,425	68,608	71,406	65.1
Attending segregated settings for multiple disabilities and congenital deaf blindness	1,643	2,099	2,030	2,003	2,081	2,104	28.1
Attending segregated settings for learners with autistic spectrum disorders	1,221	1,585	1,681	1,699	1,878	1,944	59.2

Source: Directorate-General for Education and Science Statistics, Ministry of Education

Special education institutions

There are still learners with SEN who attend special education institutions, by specific permission of the Ministry of Education. This can occur when the limitations on learners' activity and participation are too severe and demand particularly special support. Some learners were simply old enough to stay in special education institutions when a new model of inclusive education was introduced. It is an education system developed in a segregated context, residual in relation to the overall number of learners with SEN. It is decreasing, with only a few learners remaining in the system until the end of their education and no new learners starting.

Table 13. Number of learners with special educational needs enrolled in special schools from school year 2010/11 to school year 2016/17

10/11	12/13	13/14	14/15	15/16	16/17	% change 10/11 to 16/17
1,555	1,344	1,343	1,171	1,028	995	-36.0

Source: Directorate-General for Education and Science Statistics, Ministry of Education

The analysis of the implementation indicators in the previous tables shows:

- a very high rate of inclusion of learners with SEN in mainstream schools within communities;
- a significant growth in the number of learners considered as having special educational needs, which should be considered in future policy developments;
- an increase in the number of specialised teachers available to support these learners in mainstream schools;
- a significant increase in the number of mainstream schools supported by the CRI;
- an increase in the number of learners with special educational needs in specialised support units, the implications of which should be considered in relation to inclusive education;
- a significant increase in the average number of learners with special educational needs per specialised teacher, despite a higher number of specialised teachers. This derives from the almost exponential growth of learners considered to have special educational needs;

- a progressive and sustained decrease in the number of learners attending special schools, which is currently residual.

Special education allowance

This subsidy has a long tradition in the context of the measures to support the education of children and young people with disabilities in Portugal. It is the responsibility of the Ministry of Work, Solidarity and Social Security (MTSSS) and arose at a time when other educational support solutions were scarce. Despite the very significant evolution of the educational responses aimed at these learners in recent years, the allowance has been maintained. This only occurred after some political debate, particularly with the implementation of the current inclusive model assured in mainstream schools since 2009/2010.

The allowance is assigned monthly to children and young people with:

proven permanent reduction of physical, motor, organic, sensory or intellectual capacity ... while not requiring special education, requires individual support by a specialised professional (Segurança Social, 2017).

The institutions considered under this modality of support need previous accreditation by the Ministry of Education.

Impacts of support measures: performance of learners and education systems

The research was unable to collect benchmarking data for the impacts and effectiveness of the presented support measures. Ideally, it would be pertinent and convenient for the monitoring and evaluation of the generated results to measure their effectiveness. However, it may not always be reasonable, or even possible, in terms of cost-benefit analysis, to isolate the effects of each of the support measures on the learners involved. The nature of the measures and their deep and intrinsic interactivity may make it difficult to extract knowledge about the learning process and the educational success of the learners. This is particularly important to consider in terms of the approach to funding policies. This is discussed in the *Identification of challenges and future developments in the country system of funding inclusive education* chapter, with regards what can and should be measured and how.

If it is not possible to identify the effectiveness of each support measure, it is possible to identify their impact, included in the analysis of the education system performance. The indicators normally used to measure the capacity of education

systems to ensure access, participation, progression and success for all learners are the structural dimensions to evaluate the inclusiveness of education systems.

Below are some tables with information that shows the performance of the Portuguese education system, in a trend perspective. There are developments in:

- decreasing the gaps in key academic skills;
- the completion of educational pathways;
- lower levels of retention and early drop-out.

These are indicators of the capacity of the education system to be progressively more inclusive. There is not yet enough data to assess the cost-effectiveness of the education system. Nonetheless, it is still possible to establish a positive correlation between the implementation of increased support measures, the increased expenditure on them (some are to be completed) and their impact on learners' achievements.

Despite the effort and progress, the results are not yet at the desired or necessary levels, compared to the international references for Portugal. However, when compared to past results, positive results and progress are being made.

There is evidence of a deep evolution in the inclusive character of the Portuguese education system and 98.8% of learners with SEN attend mainstream schools. These schools either belong to the public schools network or are private schools with Ministry of Education supervision and/or contracts offering public education. The number of learners in special schools is (increasingly) residual. The education system has progressively opened up to the need to adequately support the education of these learners, with a significant growth in specialised teachers and other support measures.

The sustained and expressive increase in the number of learners considered as having special educational needs is an empirical evidence worthy of careful analysis. This increase may have diverse meanings, questionable and problematic at times, and could impact the adequate use and efficiency of additional support.

Table 14. Percentage of 15-year-old learners with low skills in reading, maths and science in the school years 2006, 2009, 2012 and 2015 (PISA)

Learners with low skills (%)	2006	2009	2012	2015	Variation 2006 to 2015 (pp)
Reading	24.9	17.6	18.8	17.2	-7.7
Maths	30.7	23.7	24.9	23.8	-6.9
Science	24.5	16.5	19.0	17.4	-7.1

Source: OECD, PISA

Table 15. Completion rate of primary and lower-secondary education and upper-secondary education in Ministry of Education public schools (%) from school year 2008/09 to school year 2014/15

School level and teaching modality	08/09	09/10	10/11	11/12	12/13	13/14	14/15	Variation 08/09 to 14/15 (pp)
Primary and lower-secondary (PLS) mainstream schools (9 th grade)	85.9	85.7	85.4	82.1	81.2	83.7	88.5	2.7
PLS art schools (9 th grade)	83.9	100.0	96.2	99.0	98.1	95.1	96.0	12.1
PLS CEF (types 2 and 3)	82.4	81.4	82.6	82.3	80.6	85.5	85.6	3.2
PLS professional courses (9 th grade)	–	–	–	–	–	–	–	–
Upper-secondary (US) mainstream schools (12 th grade)	65.3	65.2	61.0	62.8	62.1	62.9	67.8	2.5
US humanistic-scientific courses	64.5	65.2	61.2	62.9	62.0	62.9	67.8	3.3
US technological courses	71.2	66.2	58.1	60.1	63.7	70.3	–	-1*
US art schools (12 th grade)	62.3	71.3	73.8	74.5	75.0	72.3	83.7	21.4
US CEF (types 5 and 6)	91.0	93.8	94.3	92.6	90.4	93.3	–	2.3*
US professional courses (3 rd year)	75.7	73.5	65.5	64.5	62.0	62.9	67.2	-8.5

* Variation from 08/09 to 13/14.

Source: Directorate-General for Education and Science Statistics, Ministry of Education

Table 16. Rate of retention/drop-out in primary and lower-secondary education and upper-secondary education, in youth-orientated education and training in Ministry of Education public schools (%) from school year 2008/09 to school year 2014/15

School level and teaching modality	08/09	09/10	10/11	11/12	12/13	13/14	14/15	Variation 08/09 to 14/15 (pp)
Primary and lower-secondary (PLS) mainstream schools (9 th grade)	14.1	14.3	14.6	17.9	18.8	16.3	11.5	-2.7
PLS art schools (9 th grade)	16.1	0.0	3.8	1.0	1.9	4.9	4.0	-12.1
PLS CEF (types 2 and 3)	17.6	18.6	17.4	17.7	19.4	14.5	14.4	-3.2
PLS professional courses (9 th grade)	–	–	–	–	–	–	–	–
Upper-secondary (US) mainstream schools (12 th grade)	34.7	34.8	39.0	37.2	37.9	37.1	32.2	-2.5
US humanistic-scientific courses	35.5	34.8	38.8	37.1	38.0	37.1	32.2	-3.3
US technological courses	28.8	33.8	41.9	39.9	36.3	29.7	–	1*
US art schools (12 th grade)	37.7	28.7	26.2	25.5	25.0	27.7	16.3	-21.4
US CEF (types 5 and 6)	9.0	6.2	5.7	7.4	9.6	6.7	–	-2.3*
US professional courses (3 rd year)	24.3	26.5	34.5	35.5	38.0	37.1	32.8	8.5

* Variation from 08/09 to 13/14

Source: Directorate-General for Education and Science Statistics, Ministry of Education

Table 17. Early drop-out rate of education and training (%) from school year 2010/11 to school year 2015/16

10/11	11/12	12/13	13/14	14/15	15/16	Variation 10/11 to 15/16 (pp)
22.0	19.8	18.1	16.7	12.9	13.3	-8.7

Source: Statistics Portugal

The tables below show some data of the evolution rates of the results corresponding to the indicators mentioned above, in an integrated and comparative way.

Table 18. Rates of early drop-out, completion and drop-out in primary, lower-secondary and upper-secondary education, in Ministry of Education public schools (%) from school year 2010/11 to school year 2014/15

Rate	10/11	11/12	12/13	13/14	14/15	Variation 10/11 to 14/15 (pp)
Early drop-out rate	22.0	19.8	18.1	16.7	12.9	-9.1
Completion rate – 9 th grade	85.4	82.1	81.2	83.7	88.5	3.1
Completion rate – 12 th grade	61.0	62.8	62.1	62.9	67.8	6.8
Retention/drop-out rate – 9 th grade	14.6	17.9	18.8	16.3	11.5	-3.1
Retention/drop-out rate – 12 th grade	39.0	37.2	37.9	37.1	32.2	-6.8

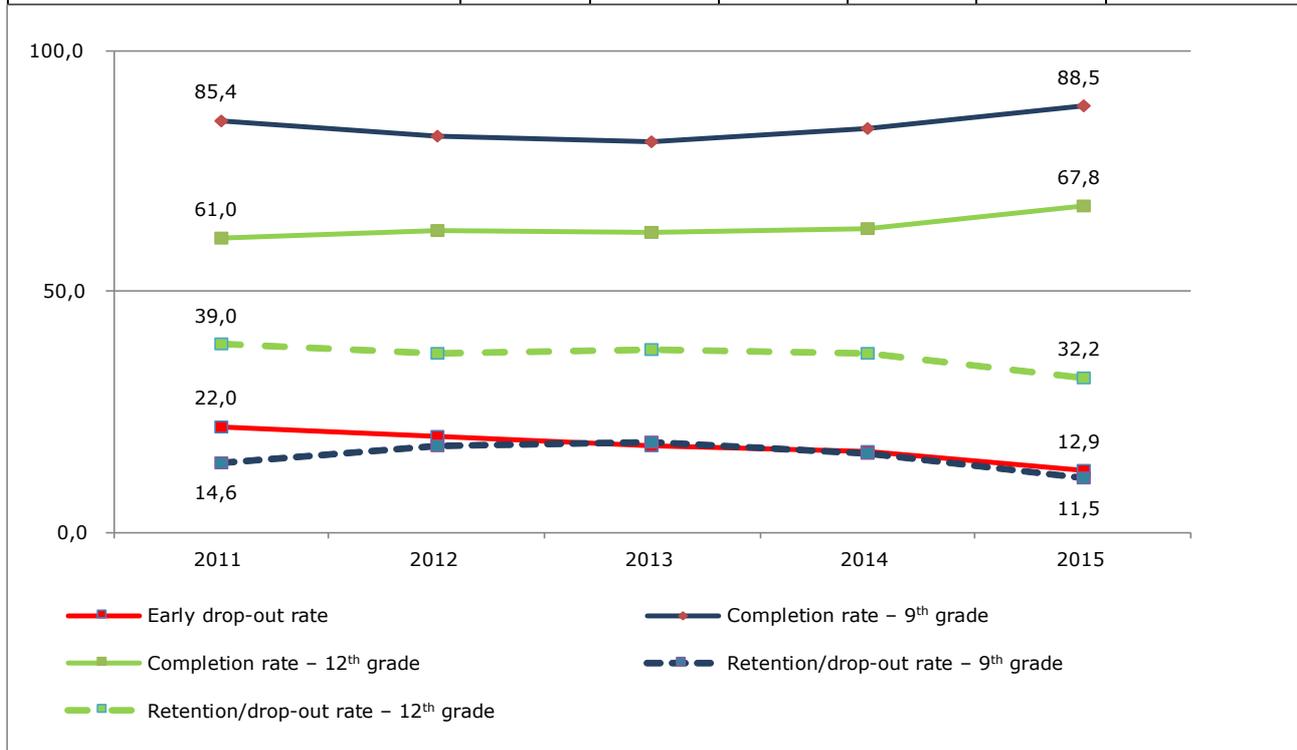


Figure 1. Rates of early drop-out, completion and drop-out in primary, lower-secondary and upper-secondary education in Ministry of Education public schools (%)

Source: Directorate-General for Education and Science Statistics, Ministry of Education

DESCRIPTION OF THE POLICY FOR FINANCING IN THE COUNTRY

In Portugal, the responsibility for the design, management and financing of public education has historically been linked primarily to the Ministry of Education (ME), with an appropriate allocation in the State Budget. In recent years, this responsibility has been progressively decentralised and the responsibility shared. Schools have more autonomy and municipalities are more involved. Municipalities are financed by the Ministry of Finance and by their own revenues, generated by local taxes.

Contributions also come from the MTSSS (special education allowance and engagement with technical social support) and the MS (medical assessment contributions and school health). These contributions are for areas under their political responsibility which overlap with the ME. 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. Occasionally, companies and other entities (such as foundations) are also involved, collaborating on, and occasionally launching, inclusive education initiatives and projects.

Annex 4 gives an overview of the financing of inclusive education in Portugal.

The financing of schools and the provision of resources are structured around five axes:

- Costs, including salaries for teachers and other professionals, and investment expenditure, supported directly by the ME, which regularly transfers the required funds to schools;
- Annual budget allocation for each school (with a reduced expression in financial terms) containing ME funding for the current period;
- Specific financial contributions, as subsidies, from the ministerial department in charge of schools, for specific initiatives, under existing selective or additional support measures. These are requested by schools as needed, under the rules defined by ME;
- Applications for funding from the European Social Fund 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;

- Allocation of subsidies and/or provision of support and services by or contracted by municipalities, complementary to those available in schools;
- Sometimes own revenues, from school fundraising initiatives and collaborations with companies which co-finance specific projects by granting different types of support to schools.

Municipalities have formal responsibilities towards kindergartens and elementary schools regarding education funding. They are responsible for providing co-ordinators and auxiliary staff, maintaining buildings and assigning standard equipment. A very significant proportion of education responsibilities is in the process of being transferred to the municipalities (as is the case with many other areas hitherto centralised in the ME). A pilot involving fifteen municipalities has been in place for several years, but are legal provisions are currently being discussed and prepared in the National Parliament. 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 would remain at the national level.

The following are the financing mechanisms and the amounts of expenditure incurred (those which could be found) associated with support measures. They are in a trend approach, linked to the three-tier model as outlined in the Project Conceptual Framework. They cover the period from 2008/2009 to 2016/2017.

General funding: Universal support measures

Universal support 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.

Table 19. Total expenditure on education – Ministry of Education (EUR thousand) from school year 2008/09 to school year 2016/17

08/09	09/10	10/11	11/12	12/13	13/14	14/15	15/16	16/17	% change 08/09 to 16/17
5439417	5848661	5781189	5019868	4963184	5052220	4913288	5123982	5061986	-6.9

Observation: Calculation of each school year, using the formula $1/3 \text{ Anon-1} + 2/3 \text{ Anon}$

Source: *Budget Execution 2008-2015, Provisional Budget 2016 and Initial Budget 2017*

Throughout funding: Selective support measures

Selective support 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.

Available data on the amount of expenditure, together with available figures relating to other existing support measures, is presented in the table below.

Table 20. Evolution of overall expenditure on education and selective support measures (EUR thousand) from school year 2009/10 to school year 2016/17

Expenditure	09/10	10/11	11/12	12/13	13/14	14/15	15/16	16/17	% change 09/10 to 16/17
Total	5848661	5781189	5019868	4963184	5052220	4913288	5123982	5061986	-13.5
Selective support measures ⁽¹⁾	152747	145573	124908	103946	138469	87494	88635	90798	-40.6
TEIP	16454	22858	12939	23956	23542	21288	21298	21301	29.5
CEF	136293	122715	111969	79537	94916	18018	253	20936	-84.6
ATE ⁽²⁾	–	–	–	–	–	–	–	18800	–
Vocational courses ⁽³⁾	–	–	–	454	20010	48188	67085	29762	6.459
ASE ⁽⁴⁾	169445	170411	165335	178237	185324	181483	198389	–	–

Notes: ⁽¹⁾ Expenditure incurred in public schools; ⁽²⁾ Estimated value; ⁽³⁾ Variation is from 12/13 to 16/17; ⁽⁴⁾ Expenditure excluded from the total expenditure on selective support measures, as no information is available for 16/17 year.

Source: *BIMEC, March 2017; Directorate-General for Education and Science Statistics, Ministry of Education; Budget Execution 2008-2015, Provisional Budget 2016 and Initial Budget 2017*

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 the specific condition of functionality (SEN), and is integrated into Individual Education Programmes.

Below is a summary table with the funding associated with the various dimensions of additional support for learners with SEN. The second table shows the average expenditure per learner.

As the data shows, the expenditure on additional support for learners with SEN has increased significantly. The number of special education teachers, CRI, specialists contracted by schools, kindergarten assistants and assistive products have all increased, with a total increase of 33.3% (Table 21). This is despite the overall expenditure on education in the same period suffering a reduction of 6.9% (Table 19).

Table 21. Expenditure on additional support measures for learners with SEN (EUR million) from school year 2009/10 to school year 2016/17

Support type	09/10	10/11	11/12	12/13	13/14	14/15	15/16	16/17	% change 09/10 to 16/17	% change 12/13 to 16/17
Special education teachers, specialist teachers	178.141	181.521	178.844	184.863	188.152	201.091	230.458	244.014	37	32
Special education teachers, early intervention	–	–	–	20.158	20.158	20.158	20.310	20.310	0.8	0.8
Special education teachers, CRTIC	–	–	–	1.898	1.898	1.898	1.898	1.898	0	0
Special education teachers, hospitals	–	–	–	1.746	1.746	1.784	1.746	1.784	2.2	2.2
CRI financing	9.222	9.085	9.085	8.631	11.582	10.451	10.449	10.449	13.3	21.1
Professionals contracted by schools – specialised Units	5.132	5.337	5.473	5.249	6.352	6.842	7.359	7.625	173.6	45.3
Public kindergarten assistants	–	–	–	1.447	4.160	5.091	4.666	4.039	179	179
Learners with SEN transport	–	–	–	–	6.800	6.900	5.218	8.500	25	25
Assistive products for learners	0.2	0.2	0.2	0.2	0.2	0.2	0.4	0.4	100	100
CRTIC financing	0.125	0.125	0.125	0.125	0.125	0.125	0.125	0.125	0	0

Support type	09/10	10/11	11/12	12/13	13/14	14/15	15/16	16/17	% change 09/10 to 16/17	% change 12/13 to 16/17
Specialised support units	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0	0
Total	193.320	196.768	194.227	224.819	241.674	255.041	283.129	299.645	55	33.3

Source: BIMEC, March 2017; Directorate-General for Education and Science Statistics, Ministry of Education

Table 22. Average expenditure per learner on additional support measures from school year 2010/11 to school year 2016/17

Learners and expenditure	10/11	12/13	13/14	14/15	15/16	16/17	% change 10/11 to 16/17
Number of learners with SEN in public schools	43,248	58,064	60,610	66,425	68,608	71,406	65.1
Expenditure on additional support measures (EUR thousand)	196,768	224,819	241,674	255,041	283,129	299,645	52.3
Average expenditure per learner with SEN (EUR thousand)	4.5	3.9	4.0	3.8	4.1	4.2	-7.8

Source: Directorate-General for Education and Science Statistics, Ministry of Education; BIMEC, March 2017; Budget Execution 2008-2015, Provisional Budget 2016 and Initial Budget 2017

The average expenditure per learner does not follow the growth of the expenditure on the additional support measures. This is a consequence of the significant increase in the number of learners with SEN referred (as previously mentioned in this report).

Depending on the requirements of school clusters for selective and additional measures and following the rules and procedures, the throughout and input funding may take one or more of the following forms:

- added in to the school cluster overall endowment;
- an additional allocation to the school cluster budget to cover expenditure on the acquisition of goods and services;
- an increase in the number of teachers;
- credit hours for teachers for specific activities;
- an increase in teaching hours;
- an allocation for the acquisition of specific professionals or services, associated with the number of learners involved;

- specific allocations for funding programmes.

Analysis of financing data

A brief analysis of the data presented points to educational policy options in recent years with some financial constraint within the overall expenditure on education.

Not all the financial data regarding the second level of support is available. Some recent changes are not yet shown in data regarding indicators of implementation and expenditure. Nonetheless, the tables give an opportunity to draw some conclusions about the inclusiveness of the education system.

For learners with SEN, the inclusiveness is clear and the rate of expenditure growth is striking. Notwithstanding the impressive progress in recent years, there is still more to do in terms of the quality of the education delivered and the level of the learners' achievements. The political options and the system being implemented are right. However, improvements are still needed to allow a fully inclusive education model to be implemented, capable of guaranteeing quality education and success for every learner and assuring equality.

The tables and figures below could be regarded as part of the methodological route to follow in monitoring and assessing the inclusiveness of the education system. They can help to understand the correlation between support measures, expenditure and impacts on educational achievements and the cost-effectiveness of the support measures and of the system. The data regarding expenditure on the selective support measures is limited to those measures for which information was available.

Table 23. Total Ministry of Education expenditure on education (available data) and expenditure on selective and additional support measures (EUR million) from school year 2010/11 to school year 2016/17

Expenditure	09/10	10/11	11/12	12/13	13/14	14/15	15/16	16/17	% change 09/10 to 16/17
Total	5,848.661	5,781.189	5,019.868	4,963.184	5,052.220	4,913.288	5,123.982	5,061.986	-13
Selective support	152.747	145.573	124.908	103.946	138.469	87.494	88.635	90.798	-41
Additional support	193.320	196.768	194.227	224.819	241.674	255.041	283.129	299.645	55

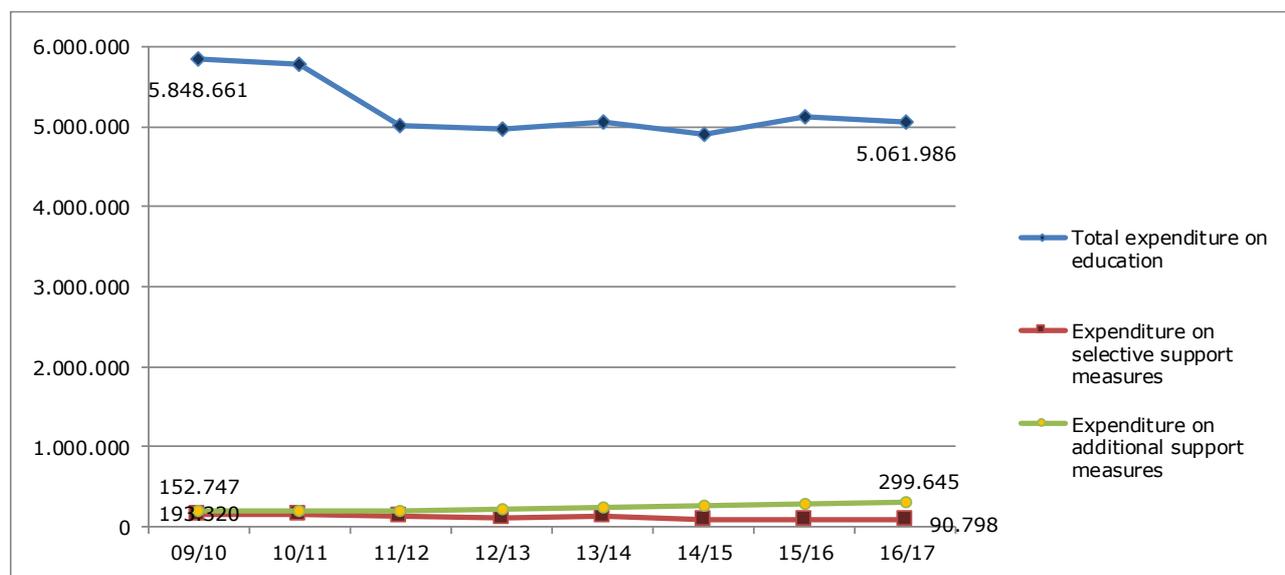


Figure 2. Total Ministry of Education expenditure on education (available data) and expenditure on selective and additional support measures

Note: Expenditure on selective and additional support measures in public schools. Expenditure on selective support measures includes only the one identified. It excludes the one referring to the ASE corresponding to selective support measures.

Source: BIMEC, March 2017; Directorate-General for Education and Science Statistics, Ministry of Education; Budget Execution 2008–2015, Provisional Budget 2016 and Initial Budget 2017

Table 24. Evolution of the expenditure on selective and additional support measures (available data), in relation to the total Ministry of Education expenditure on education from school year 2009/10 to school year 2016/17

Expenditure	09/10	10/11	11/12	12/13	13/14	14/15	15/16	16/17	Variation 09/10 to 16/17 (pp)
Total	100%	100%	100%	100%	100%	100%	100%	100%	–
Selective support measures ⁽¹⁾	2.6%	2.5%	2.5%	2.1%	2.7%	1.8%	1.7%	1.8%	-0.8
Additional support measures ⁽¹⁾	3.3%	3.4%	3.9%	4.5%	4.8%	5.2%	5.5%	5.9%	2.6

Note: ⁽¹⁾ Expenditure in public schools

Source: BIMEC, March 2017; Directorate-General for Education and Science Statistics, Ministry of Education; Budget Execution 2008–2015, Provisional Budget 2016 and Initial Budget 2017

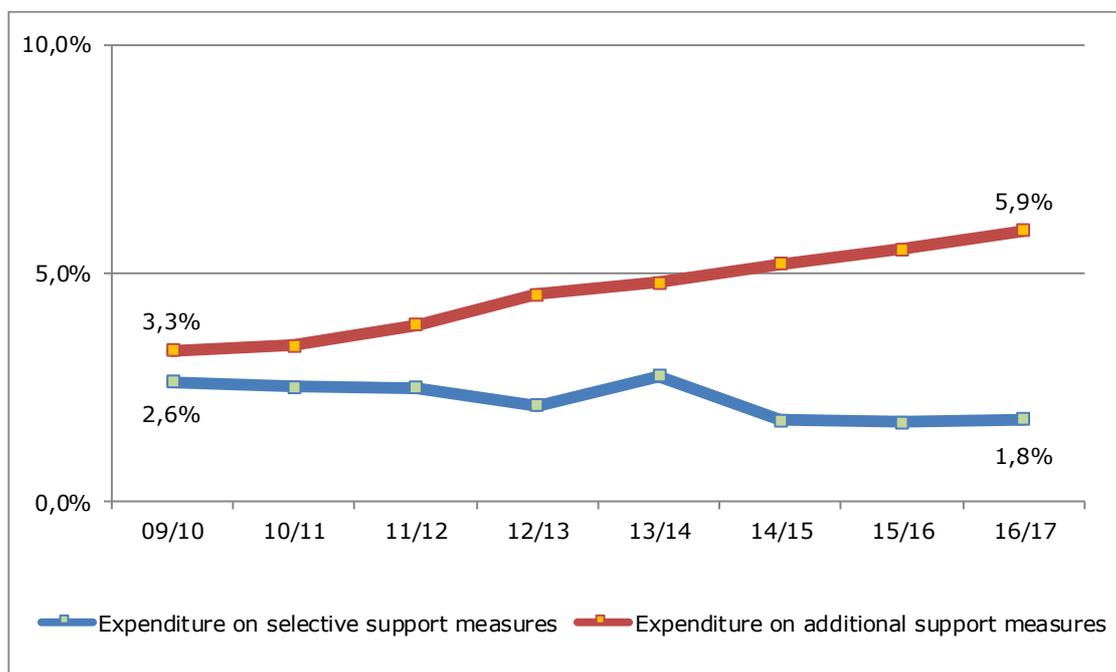


Figure 3. Evolution of the expenditure on selective and additional support measures (available data), in relation to the total Ministry of Education expenditure on education

Special education schools and special education allowance

Most special schools transformed into CRI which provide specialised support services to mainstream schools. The funds allocated by the Ministry of Education include EUR 11 million for the CRI.

Special education schools and special education subsidy

The funding allocated by the Ministry of Education to special schools has been reduced. This corresponds to the decrease in the number of learners attending special schools, but in a non-proportional way, which is matter for analysis.

Table 25. Financing awarded to special schools (EUR million) from school year 2008/09 to school year 2016/17

08/09	09/10	10/11	11/12	12/13	13/14	14/15	15/16	16/17	% change 08/09 to 16/17
28.949	24.782	24.000	19.867	18.267	18.281	19.259	19.064	21.132	-27.0

Observation: Calculation of each school year using the formula $1/3 \text{year } n-1 + 2/3 \text{year } n$

Source: *Budget Execution 2008–2015, Provisional Budget 2016 and Initial Budget 2017*

Special education allowance has been the subject of heated political discussion in recent years. The data regarding special education allowance is set out in the following table.

Table 26. Special education allowance (EUR million) from school year 2014/15 to school year 2016/17

Special education allowance	14/15	15/16	% change 14/15 to 15/16
Beneficiaries	11.384	9.716	-15
Expenditure	18.197	15.064	-17

Source: Ministry of Work, Solidarity and Social Security (MTSSS)

The role of municipalities in inclusive education

Recent policy options tend to consider local authorities – namely municipalities – as fundamental pillars in supporting the implementation of public education policies, as stated earlier in this report.

Regardless of the new role they are to assume, municipalities already have a long support tradition in the education field. They complement the services provided by schools, especially – but not exclusively – at the level of the inclusion of learners with special educational needs. This support is not part of the municipalities' capacities. Thus, for years now municipalities have been key partners in the development of education policies in the country. Their intervention has been quite relevant to the enrichment and the complete development of learners, and especially for the quality of the education provided to learners with SEN. Experiences across the country are quite diverse, depending on the financial capacity, and perhaps the politics, of each municipality.

There is no data available on the total funds and other resources invested in education by municipalities at a national level. There is, however, some evidence showing that it is increasing annually.

Two examples are presented below: the municipalities of Cascais and Vila Nova de Gaia. These should be considered merely as examples, not as case studies or as a demonstration of what happens throughout the country. They should not be considered as a pattern of reference, but simply as examples of good practice.

Cascais Municipality

The support measures provided by this municipality for the education of learners with special educational needs include:

- local partnerships that facilitate the implementation of individual transition plans for post-school life;
- complementary therapeutic activities, in addition to those provided by schools;
- adapted and supervised transportation to allow learners to participate in extra-curricular activities at school;
- training initiatives for special education teachers and specialised technicians, organised in partnership with schools, CRI and the Municipality;
- support for curricular enrichment activities and family support initiatives;
- psycho-pedagogic support bank;
- adapted sport activities.

These activities are almost entirely implemented by mobilising local partners specialised in the respective domains, with direct financial support from the municipality. In the 2016/2017 school year, the budget for these activities increased to EUR 620,200.

Vila Nova de Gaia Municipality

As a wider, political intervention in education, which is not part of their legal obligations, the municipality provides specific support for learners with special educational needs. This includes:

- complementary therapies (such as hydrotherapy, equine therapy and cinotherapy);
- transport for learners in pre-primary and the first cycle of basic education that have been identified by the schools' special education co-ordinators;
- payment of school fees for the learners who are most in need (Gaia+inclusiva);
- extra-curricular activities during school holidays;
- full co-funding of the cost of school meals;
- junior university scholarships, combining economic deprivation status with academic results;

- curricular development and enrichment activities for pre-primary and the first cycle of basic education and for specialised units in both the first and second cycles of basic education;
- transport to school for learners with special educational needs, starting in 2016/2017.

These activities, promoted and ‘boosted’ by the municipality, are field-implemented through the mobilisation of local partners – with financial subventions for this purpose – or through the direct acquisition of services to providers.

There are also municipality initiatives for other, universal support measures for learners. These include the free distribution of textbooks to learners in the first, second and third cycles of basic education, ‘virtual school’ licenses and activities within the Gaia@prende+ social programme. Being universal, to some extent these measures add to the philosophy of inclusive education, as they enable access to resources that may otherwise be unobtainable for learners in economic deprivation.

The total 2016/2017 budget for specific support measures for learners with special educational needs is EUR 557,900. The total amount of municipality expenditure related to education but not legally required from the municipality is nearly EUR 4.5 million.

DETAILS ON KEY FACTORS IDENTIFIED WITHIN THE FPIES PROJECT CONCEPTUAL FRAMEWORK

Based on the analysis of the contents of this report, some main conclusions and remarks can be made, following the descriptive questions identified in the FPIES Project Conceptual Framework. These conclusions highlight certain strengths and challenges in the current funding system and identify future developments in the country's system of financing inclusive education.

How are funding and governance mechanisms promoting a co-ordinated, integrated, efficient and cost-effective system for inclusive education?

What are the tracking mechanisms for funding? Is there a way to know where funds come from and where they go to? What are the mechanisms for monitoring spending? How are schools made accountable for spending?

The various interventions in support of inclusive education and the related funding are mainly managed at three levels:

- the Ministry of Education, including the national network of schools, and complementary interventions;
- municipalities;
- some contributions from other Ministries, especially MTSSS and MS.

In Ministry, school and municipality interventions there is a 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. Here there is frequent close interaction, although sometimes it is more an articulation of activities than an effective co-ordination of plans and interventions.

The funding mechanisms for schools and for the provision of resources are based on:

- costs of salaries for teachers and other professionals and investment expenditure, directly supported by the ME;
- annual budget for each school for the current operation, as well as potential subsidies for specific initiatives from the ministerial department in charge of schools. These could be funds or resources for selective or additional support measures, requested by schools under the rules defined for that effect;

- applications for funding from the European Social Fund for training, some as selective support measures;
- allocation of subsidies and/or provision of support and services by municipalities or contracted by municipalities, complementary to those available in schools;
- own revenues from school fundraising initiatives, including company funds for co-financing projects.

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 ME);
- monitoring spending;
- reporting the number of learners engaged in school activities and their academic achievement.

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. With regards the European Social Fund financing, schools must follow the specific rules for reporting to the Operational Programme, which are mostly focused on levels of execution and costs incurred.

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 ME 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.

Schools report their annual activities plan and budget to the ME annually. This report includes the initiatives and activities the school promoted, the associated expenditure 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, ESF or others within the Ministry of Education 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.

Monitoring and reporting activities are the responsibility of schools. They follow applicable rules which are defined by the ME.

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.

How does the system for financing inclusive education enable stakeholders at territorial, local and school level to act inclusively?

The design, management and financing of the education system in Portugal has historically been quite centralised. In recent decades, policy initiatives, programmes and support measures have created room for local agents, namely schools, to intervene with some autonomy. They are able to implement initiatives which aim to promote inclusion and educational success and reduce exclusion and existing gaps between learners' results.

There are significant changes being prepared which give 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 CRI). 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 by partnerships involving municipalities, schools, CRI and other local organisations. They will also cover EU funding available to municipalities and metropolitan areas to support inclusive education.

How does the financing system for inclusive education support stakeholders at territorial, local and school level to avoid labelling those with the most severe needs? What is the idea behind it? Does it work in practice?

The development of school clusters increased schools' responsibility for acting inclusively on a daily basis. It invited stakeholders to use all existing local resources and to involve parent associations. The monitoring mechanisms between the Ministry and the school clusters is 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 and special education teachers is primarily connected to the needs of individual learners, rather than aiming at capacity-building of class teachers and the whole school. Existing capacity-building mechanisms may be inadequate for enabling school clusters and teachers to assume responsibility for inclusive educational practices.

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 SEN, this is already in place to some extent, but it should be developed further and opened to all educational diversities.

How are the capacity building mechanisms related to professional development funded? By who and for what? How does the funding for capacity building foster effective and equitable educational institutions?

Capacity-building of those involved in inclusive education, especially directors of school clusters, specialised teachers and subject teachers, is probably one of the most relevant factors for the successful implementation of inclusive education. This relevance was perhaps not recognised in the past. Inclusive education is something new and education politics have mostly been focused on promoting academic results, rather than equality in education.

In initial teacher education, there is a basic introduction to inclusive education, mostly focused on SEN issues. Several universities and polytechnic institutions offer master's degrees and continuous training programmes in special education. 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' (for curricular and pedagogical criteria) or the institutions themselves (for teaching and certification quality).

Continuous teacher training is mainly the responsibility of teacher training centres associated with the school clusters. Their financing is dependent on the ESF or ME funds made available. The Inspectorate of Education and Science (IGEC) is responsible for quality control of continuous teacher training.

The training offers mentioned above have, until now, focused mostly on learners with SEN. There is a lot of room for improvement through broadening the scope of

inclusive education. New responsibilities and roles should be defined for schools and teachers to allow effective and equitable educational institutions and assure quality education for all learners, regardless of their needs.

Continuous training of directors, teachers and other school professionals is crucial to support them in implementing and achieving the necessary change. Inclusive education is much more than having learners in schools, it is a question of educational culture and strategy. Training needs to be enhanced and transformed. It should support new pedagogical approaches and practices and a new atmosphere in schools, which are capable of supporting learning and development in an inclusive way, promoting equality in education.

What are the quality control mechanisms that inform financing decisions and monitoring of effectiveness?

The monitoring mechanisms mentioned above ensure some level of quality and effectiveness control and provide support for financing decisions. However, they are mainly focused on legal and regulatory compliance surrounding the implementation of educational activities, expenditure and results.

In addition to these monitoring activities, there is another level of monitoring. This is the responsibility of IGEC and includes several dimensions and types of activities.

Concerning the inclusion of children and learners

'Regarding the concern IGEC ... has with children and learners' inclusion, equity is guaranteed in ... IGEC's Annual Activities Plan ... developed throughout the year. All the following activities are within the monitoring programme. Monitoring consists of regular observation and support of educational action, in order to obtain a better knowledge about the application of educational policy measures. Our purpose is to use these activities in a way that leads to an overall improvement of the organisational practices within schools, reinforcing their autonomy, boosting the learning process and the learners' engagement (IGEC, no date).

This includes several activities and support measures, currently focused on:

- private kindergartens' solidarity network
- monitoring of schools' educational action, especially schools with low achievement and those belonging to TEIP;
- monitoring Specific Tutorial Support;

- managing the curriculum for experimental science teaching and for English teaching in the first and second cycles.

Monitoring and evaluation of special education

IGEC's intervention in the scope of Special Education takes place at various levels with emphasis on the activity Special Education – Responses, which started in 2010 (IGEC, no date) It aims to contribute to the construction of an inclusive organisational culture and intends to achieve educational success for every learner.

Special Education – Responses activity has the following objectives:

- *to monitor the organization and functioning of Special Education in schools...;*
- *to analyse the quality of the educational responses provided to children and learners with permanent special educational needs and the achieved results, so as to contribute to the improvement of school practices;*
- *to monitor the functioning of the ICT Resource Centres for Special Education and their connection with schools;*
- *to contribute to the regulation of the organisation and functioning of Special Education.*

At the end of the intervention the inspection teams write down the report. This document is structured according to the following framework: (1) Planning and Organisation of Special Education and (2) Educational Responses and Learner Outcomes – and presents a synthesis of the positive aspects and those to be improved. (IGEC, no date)

Other activities carried out by IGEC include:

- the organisation and functioning of private and co-operative schools;
- the external evaluation of schools;
- the organisation of the academic year;
- ombudsman;
- in-service teacher training;
- external assessment tests for basic education and national exams for secondary education.

IGEC plays a relevant role at this level. In the follow-up and evaluation of schools, it carries out a deeper evaluation of the quality of processes, educational dynamics and results. This naturally occurs in addition to the verification of compliance with the applicable legal definitions and guidelines relating to management, administrative and pedagogical practices.

There is not currently any systematic, specific evaluation of all the support measures implemented, nor of the learners involved or the associated results and funds. There are periodic evaluations which focus on the impacts of some of the adopted programmes and measures. However, they have a reduced or inexistent focus on cost effectiveness. The trends and cost effectiveness of each available support measure or cluster of measures are not currently analysed.

How do funding mechanisms enable specialist/separate provision to act as a resource for mainstream schools?

In the past, there was a strong specialised education network for the education of learners with SEN. Since 2009/2010, special schools in Portugal have become Resource Centres for Inclusion (CRI). In this context, the funding allocated to special schools progressively shifted to provide technical support to mainstream schools, with a decrease in the funding to special education schools.

Discussion about specific country funding issues

The funding system needs to be subjected to careful analysis, aiming at promoting more suitable implementation. It would also help to consolidate the inclusive education strategy. This would assure the rational and optimised use of the allocated funds, ensuring that schools were getting the most from them.

- It would be crucial to co-ordinate an increase in the mobilization of local educational services connected to the different Ministries. This could be done by establishing multidimensional and collaborative partnerships for educational participation and development, optimising the capacity of the different local resources.
- There is a need for closer and more structured co-ordination between schools, CRI and municipalities (as well as with other agents). This would ensure converging and coherent intervention from a technical-pedagogical perspective, optimising the effectiveness of the resources involved (Sousa et al., 2014).

- It would be pertinent to reconsider the correlation between the ME's inclusive education strategy and support measures and the special education allowance granted by the MTSS. Integrating these into a single educational approach would assure coherence and convergence and would reinforce the level of educational results.
- A comprehensive and integrated strategy to support and facilitate the successful implementation of an inclusive education approach would be very relevant during its preparation and execution. Despite the significant evolution made, this inclusive approach will appear as an opposition to the traditional, norm/deviance models of pedagogic culture. Resistance may represent a considerable obstacle to the achievement of desired goals, and may also lead to a less effective use of the allocated resources. Resistance in these transition phases is normal, but a strategy is required to overcome difficulties. The engagement and commitment of teachers, directors and staff are crucial and a key lever for success.
- Funding mechanisms are more than the resources available or the amount of resources/funds. Other crucial questions are where resources are allocated to, what are they for and what do they achieve.
- The contributions of enterprises and NGOs (e.g. internships) play a key role.
- The support schemes and the way schools are financed are complex and difficult to manage with regards inclusive education. Schools apply for selective measures and additional measures for complex needs when they identify problems or needs, through projects to mobilise specific financial support and other resources.
- Should schools be financed according to the number of learners facing learning difficulties? Or should funding be based on other criteria, such as participation rates, levels of success in school inclusion and participation, educational success, or social inclusion after education? Should it be based on identified problems or on educational results and social inclusion?
- Are the results of evaluations used by schools to improve the quality of the education they provide, in a systematic way?
- Improvements which have been made in recent years should be continued.

- Shared responsibility: the more stakeholders are involved in monitoring the educational process and in evaluating results, the more responsible they are in implementing improvements.

SUMMARY OF PERCEIVED STRENGTHS OF THE POLICY AND CURRENT FUNDING MECHANISMS

- It is an education system designed for all learners, regardless of their diversities, with a complex and comprehensive set of support measures for schools and learners. It is focused on all kinds of diversities, not only on learners with SEN.
- The transformation of special schools into resource centres for inclusion, regarding the education of learners with SEN.
- A comprehensive and solid political openness around inclusive education from the Ministry of Education, shown in the different programmes and measures made available to schools.
- Clear progress is being made in personalisation, with specific individual attention given to learners and to working with them.
- Close attention to all learners, including the poorest, through the development of specific support measures for disadvantaged learners. There are two main programmes to support them: Priority Intervention Educational Areas Programme (TEIP) and School Social Assistance (ASE).
- A strong, on-going, development-orientated political commitment, which aims to fight educational inequities and promote quality education for all learners.
- The political approach transferred to legislation, namely the new law currently under public discussion, are more and more orientated towards the inclusive education model. They adopt inclusiveness in a broad sense, as a cornerstone of educational policy and a key responsibility of the public education system.
- The new political orientation, introducing flexibility and autonomy as key concepts in the design and implementation of curricula and educational activities, which gives increased autonomy to schools.
- The increasing trend towards autonomy provided by governance and accountability mechanisms.
- The trend towards decentralisation, which allows for increasing efficiency of practices and more appropriate resource allocation mechanisms for local needs.

- An evaluation study from 2014 (Sousa et al., 2014) reviews the implementation of the partnership model between schools and the CRI. It shows evidence that the inclusive education of learners with SEN is underway, and in a consolidation phase.
- The 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. This improves both performance and equity.
- A positive correlation between the increasing investments in support measures, an evident increase in expenditure on inclusive education, and the impacts on its performance and the quality of education. This is evident in better results from learners traditionally segregated in, or even excluded from, the education system in different ways.

IDENTIFICATION OF CHALLENGES AND FUTURE DEVELOPMENTS IN THE COUNTRY SYSTEM OF FUNDING INCLUSIVE EDUCATION

There are some learning points which inspire future developments. The challenges mainly relate to areas for improvement to enhance:

- inclusive education policy and the implementation strategy;
- the related funding system;
- governance, monitoring and accountability mechanisms that support the development of well-co-ordinated policy and a streamlined system.

Policy and implementation level

- Focus on retention and drop-out rates, which are still above EU targets, is still needed, despite the clear progress made in the last few years. Avoiding retention is a big challenge within the education system.
- Attention should be given to the correlation between school failure and socio-economic conditions and qualifications of parents (namely mothers).
- Schools and teachers should focus on the needs of learners, not on the problems that may underpin such needs or on classifying or categorising them. Labelling learners should be avoided.
- Programmes and measures should be adequately mobilised by ending norm/deviance and normal/special learner approaches. The complexity of the problems and the design of suitable solutions are demanding for teachers and schools.
- The learning environment should be friendly, both pedagogically and at the human relationships level, promoting well-being and being attractive and interesting for learners.
- Enhancing co-ordination, convergence and coherence between different programmes, measures and funding agents would improve the effectiveness of support measures and funds allocated.
- More co-ordinated, collaborative and integrated cross-sectoral services are vital, such as:
 - reinforcing intra-ministry (ME) and inter-ministry (ME, MTSSS and MS) co-ordination, appealing to their legal and ethical responsibility as key actors in promoting learners' development;

- institutionalising local partnerships – organically instituted as much as possible – involving all agents. Education is a community responsibility, not just the responsibility of the ME and schools.
- The need for an adequate level of school autonomy for designing and implementing their own solutions has been clearly assumed at policy level, with significant changes in progress.
- Learners with SEN are in mainstream schools, but still have low levels of participation and educational progress. There is not enough focus on classrooms as the normal/principal space for their education in which to identify and solve problems (learners with SEN are still in separate classes or spaces and do not participate regularly in the classes they belong to).
- The expectations on education, schools and teachers, specifically concerning learners experiencing difficulties in progressing in education, need clarification. Relevant guidance and support (training, etc.) regarding how schools should meet the challenges arising from learners' diversities is needed. Guidance should not focus on the challenges posed by learners, considering them as 'incompatible' with the school educational strategy.
- Understanding of inclusive education at all levels, including for key stakeholders, should be clarified to enable the shift in mindset needed to act inclusively every day. A wider approach to accessibility should be promoted, one which is not reduced to buildings or transport, but includes pedagogical and other dimensions of accessibility.
- As part of their autonomy, schools are socially responsible. They must care about and assume their responsibility to promote quality education for all learners, assuring equality and social justice.
- There is a strong link between the education system and social inclusion. Inclusive education is also education for inclusion. It prepares learners for being and living together, enabling them to fully participate in society as citizens and helping them to stay there according to the societal requirements.

Funding system

- The system contains several funding methods from different funders. A critical, demanding issue is how to enhance these methods, assuring co-

ordination and promoting coherence and convergence between different contributions.

- Resources should be assigned to schools, not to learners in need. When resources are needed, schools could autonomously allocate adequate and necessary support, as much as possible in classes or learners' groups, in a dynamic way.
- There is a need for reinforcement of the school budget to accommodate the changes and developments aimed at assuring adequate levels of appropriate resources. This is a fundamental condition for inclusion.
- The level of investment in capacity-building needs to be re-orientated and increased, considering the crucial role this aspect plays in the strategy for successful implementation of inclusive education.
- The right balance between funds for direct interventions with learners and funds for capacity-building would enable schools, parents and communities to work together, promoting effective and sustainable inclusive education.
- Effectiveness and cost-effectiveness of funds should be under periodic/permanent systematic analysis within the education system. Cost-effectiveness should be a key concern and responsibility at all levels, with the aim of getting maximum results from the resources available.
- A key challenge for the future is empowering schools and educational communities. This decentralisation of decision-making would reinforce the capacity to organise and decide locally on the adoption of pertinent strategies and the allocation of resources.

Governance, monitoring and accountability

- 'Administering the many programmes within a school cluster may be challenging and too dependent on the skills and engagement of the school head.
- Resource allocation mechanisms allowing schools access to support and programmes may be too fragmented.
- The effectiveness of decentralisation may be hampered by current governance, monitoring and accountability mechanisms.
- Resource allocation mechanisms may foster regional and territorial disparities and there is a need to improve cross-level co-operation.

- A co-ordinated, efficient and cost-effective system for inclusive education may be hampered by strategic behaviours of school clusters. There may be a need to focus on their governance mechanisms as well as on their ability to empower each school equally.
- The effectiveness of the system for inclusive education may need reporting and monitoring mechanisms that explicitly identify the enabling effect of support provided to learners as well as to stakeholders' (FPIES Country Study Visit Report: Portugal, 2017).
- At the educational policy level, schools and municipalities should have to show results. They should give evidence of the accomplishment of their responsibilities and the value for money of the resources allocated and justify additional resources.
- Accountability is fundamental and needs to be improved. Evidence should be provided in a more transparent way at national, school and municipal levels.
- Data generated by monitoring activities should be easier to find and to use, especially by schools.

It would be advisable to set up a monitoring and accountability system, based on a current and systemic dynamic of data collection and analysis. The system should report on the evolution of the education system's inclusiveness, demonstrating trends and the cost-effectiveness of the resources allocated. This should be done annually at school, municipal and national levels.

Such strategy and system could use a set of indicators, including realisation, expenditure, results and impacts as key dimensions. The gathering and processing of data should be based on a bottom up approach.

The knowledge extraction and reporting to support decision-making would occur at school, municipal and ME levels.

Such a system of monitoring and evaluation should provide evidence about:

- The correlations between levels of realisation, results and financial resources allocated to each support measure or cluster of measures when it is impossible to separate them or when they belong to a cluster;
- The cost-benefit analysis of each measure or cluster of measures.

Another crucial aspect to enhance the accountability of educational measures and facilitate monitoring and the results/impacts evaluation is the fact that each one of them should explicitly refer from the very beginning to:

- the assumptions and overall goals;
- the time-framed objectives to be achieved;
- the mechanisms for monitoring and reporting, including the indicators to be used, the timings and the responsibilities for such.

In all circumstances, and not only when resources are limited, there should be an enforced governance model. This should ensure a follow-up, measure the funds invested along with their results and impacts and demonstrate the value for money of the allocated funds. It is socially desirable to ensure maximum transparency of the system at the levels of compliance and accountability.

Summary

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.

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

In this regard, there are some key aspects to consider, referred to during the Study Visit to Portugal:

- 'Shift from a mainly input-based approach to a throughput approach;
- Connect the trend to decentralisation with adequate governance, accountability and monitoring mechanisms;
- Improve capacity-building mechanisms towards inclusive education at municipal and school level;
- Lead schools to promote inclusiveness and to meet all learners' needs without unnecessary labelling;
- Avoid fragmented resource allocation and support mechanisms' (FPIES Country Study Visit Report: Portugal, 2017).

INCLUSIVE EDUCATION – THE WAY FORWARD

In recent years, interesting work has been developed aiming at making education universal and more qualified in Portugal. Nevertheless, the situation is not yet as desired, so the current challenge is to intensify and deepen the efforts. The third stage of the development of education systems in modern times needs to be fulfilled: making education universal, not only in terms of access, but also at the level of participation and educational success. This requires significant investment in the qualification of school education, to allow educational success for all learners and to guarantee educational equity.

This is the goal of the Programa Nacional de Promoção do Sucesso Educativo (PNPSE, National Programme for Educational Success) currently being implemented in Portugal (Costa, 2017).

The PNPSE is a national strategy for the promotion of educational attainment. It is a cornerstone of the new government education policy, created by the Council of Ministers' Resolution Nr. 23/2016. Its implementation began in the current school year. Its goal is to promote educational attainment through early and proactive intervention after the first signs of difficulty. It assumes that educational communities are the ones who best know their contexts, difficulties and potential. It also assumes they are therefore best prepared to conceive strategic action plans at school level, with the goal of improving learning.

The Programme's core principles and goals are:

- to promote qualified teaching for all learners;
- to tackle educational underachievement and failure;
- to value equal opportunities and to increase the efficiency and quality of public education.
- to require committed participation from the different stakeholders, drawing on the structural ideological assumption that educational success is possible for all learners;
- to foster the improvement of learning, with early intervention when learning difficulties are detected.

The Programme will lead to the elaboration of a Strategic Action Plan developed by each school. Based on the school's difficulties and potential, it will propose

organisational and curricular solutions to support the improvement of learning and educational success.

The PNPSE involves a complex set of integrated and intertwined measures which serve and support the Strategic Action Plan, as illustrated in the image below.

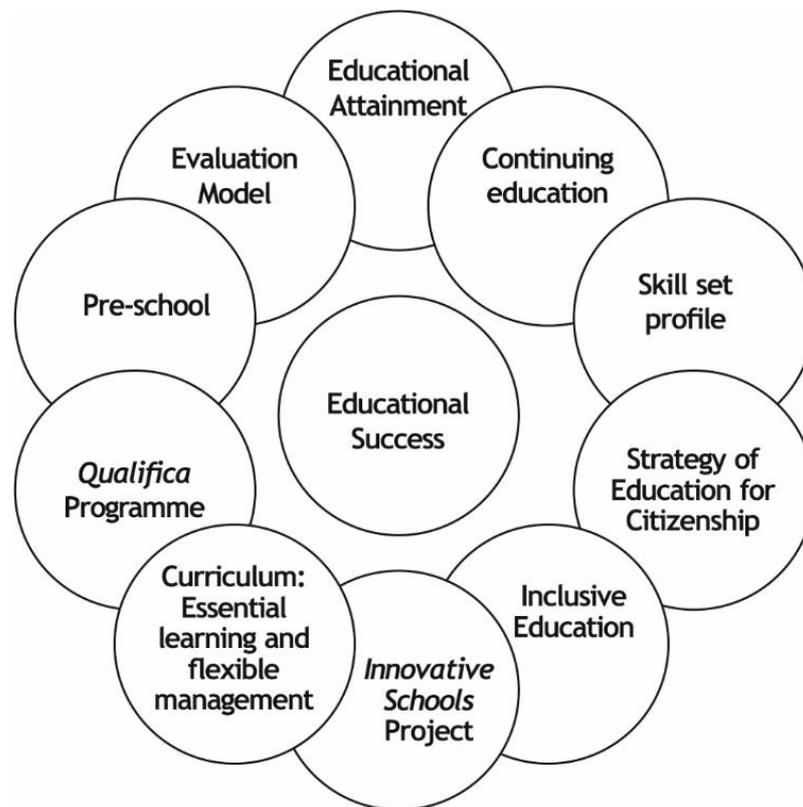


Figure 4. Measures within the PNPSE

The following is a brief overview of the PNPSE measures:

- Qualified, pedagogical pre-primary education for 0–6-year-olds as a predictor of educational success. The first stage of basic education, pre-primary education is of strategic relevance in promoting social justice and equal opportunities. It plays a pivotal role in reducing educational failure and in improving quality of learning. Pre-primary education will thus be guaranteed to all children between the ages of three and six until 2019.
- Qualifica Programme, re-investing in adult education and training, supporting the increase of qualifications in families, as a predictor of learners' increased school outcomes.

- Learner profile compiled at the outset of compulsory school, identifying the required skill set to face the challenges of the 21st century. The learner profile is an essential document, a reference for all decision-makers and educational stakeholders. Within compulsory education, it is a common matrix for all schools and educational offers, encompassing all the courses of action pertaining to educational planning, development and evaluation.
- Essential learning and flexible curriculum management framework, fostering a diversification of educational strategies towards the acquisition of expected competencies.
- Evaluation model, refocusing on the formative dimension.
- Strategy of education for citizenship, preparing citizens for the 21st century and steering learning towards the promotion of active and informed citizenship.
- Continuous teacher training, stimulating quality, favouring training workshop modalities, generating impacts on teaching practice.
- Inclusive education, promoting a school for every learner. This ensures equal opportunities regarding curriculum access, based on the assumption that all learners have the right to educational success.
- Innovative Schools Project. This is an on-going pilot trial in six schools, developed within a framework of increased autonomy around experiences of non-retention.

There will be EUR 18,000,000 available to enhance continuous teacher training for 35,000 teachers until 2018.

Inclusive education

Inclusive education is an essential challenge for the Portuguese education system, clearly assumed within the educational policy strategy. It has not yet been upgraded to a core element of the educational strategy at the school level, but is considered as a priority area in school capacity-building, including all its members.

After a long period of exclusive education which covered only a small part of the population, considerable progress has been made in Portugal to grant universal access. Despite this progress, Portugal has had an exclusionary education system. Although it is universal in terms of access, it co-exists with educational failure, repeated retentions, school drop-out and segregation.



Inclusive education is nowadays assumed as an ethical and political priority and responsibility. Fighting educational failure and school drop-out, which have been significantly reduced in recent years, is an ethical and political imperative. Creating educational opportunities and making them available ensures access, participation and success for every learner, regardless of their diversity. It is possible to discuss how to do this, how to guarantee it and the conditions needed, but not to discuss equality in education.

What is really needed is education, without adjectives.



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ANNEXES

Annex 1. List of Acronyms

Acronym	Portuguese	English
AE	Apoio ao estudo	Study Support
AERRA	Alunos com Estatuto de Refugiados e de Requerentes de Asilo	Learners with Refugee Status and Asylum Seekers
ASE	Ação Social Escolar	School Social Assistance
ATE	Apoio Tutorial Específico	Specific Tutorial Support
CEF	Cursos de Educação Formação	Education Training Courses
CPCJ	Comissões de Proteção de Crianças e Jovens em Perigo	Commission for the Protection of Children and Young People in Danger
CRI	Centros de Recursos para a Inclusão	Resource Centre for Inclusion
CRTIC	Centros de Recursos de Tecnologias de Informação e Comunicação para a Educação Especial	Communication Technology Resource Centre for Special Education
CVNB	Cursos Vocacionais de Nível Básico	Vocational Courses – Lower-secondary education
CVNS	Cursos Vocacionais de Nível Secundário	Vocational Courses – Upper-secondary education
EAC	Centro de Atividades Ocupacionais	Occupational Activities Centre
ED	Ensino à Distância	Distance Learning
ITP	Plano Individual de Transição	Individual Transition Plan
LGP	Língua Gestual Portuguesa	Portuguese Sign Language
ME	Ministério da Educação	Ministry of Education
MMSE	Metodologias Mais Sucesso Escolar	Methodologies for the Promotion of School Success
MS	Ministério da Saúde	Ministry of Health
MTSSS	Ministério do Trabalho, da Solidariedade e da Segurança Social	Ministry of Work, Solidarity and Social Security
PCA	Percursos Curriculares Alternativos	Education and Training Integrated Programme
PE	Programa Escolhas	Programme Choices
PEI	Planos Educativos Individuais	Individual Education Programmes
PIEF	Percursos Integrados de Educação e Formação	Integrated Pathways of Education and Training



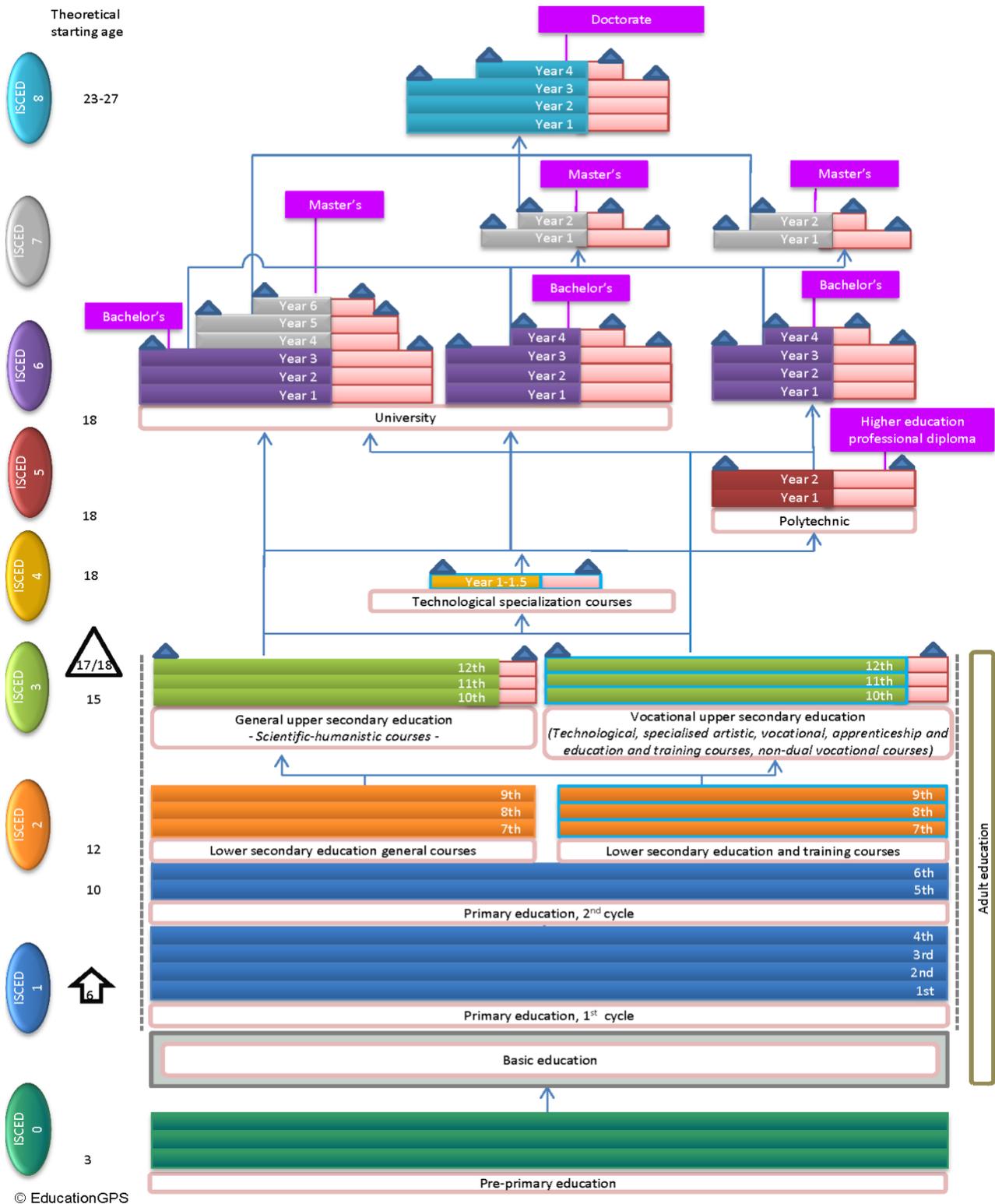
Acronym	Portuguese	English
PLNM	Português Língua Não Materna	Portuguese as a non-native language
PLSEd	Ensino Básico	Primary and lower-secondary education
PMSE	Programa Mais Sucesso Escolar	Programme for the Promotion of School Success
PNPSE	Programa Nacional de Promoção do Sucesso Educativo	National Programme for Educational Success
TEIP	Programa dos Territórios Educativos de Intervenção Prioritária	Priority Intervention Educational Areas Programme
USEd	Ensino Secundário	Upper-secondary education



Annex 2. Education system in Portugal, 2016

Portugal

2016



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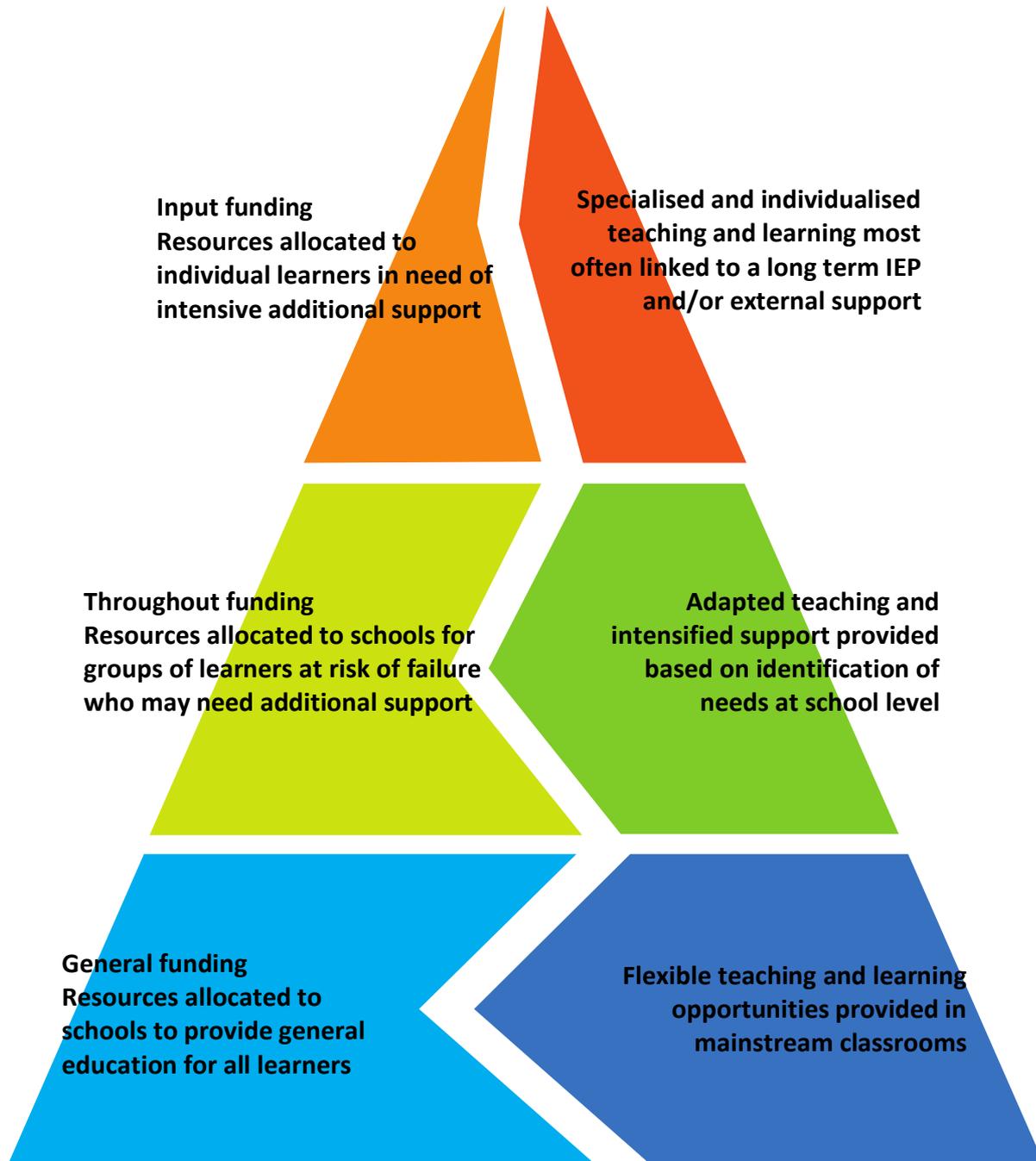
Key

-  Starting/ending age of compulsory education
-  Recognized exit point of the education system
-  Typical student flow
-  Transfer from a programme to another
-  Programme designed for part-time attendance
-  Vocational/Professional orientation
(according to national definition at the tertiary level)
-  Single structure education (integrated ISCED levels)
-  May be provided within one school structure
-  Transfer at crossing lines is not possible
-  **Diploma** Name of diploma, degree or certificate
- 2016** Reference year (school year 2015/2016 in the northern hemisphere)

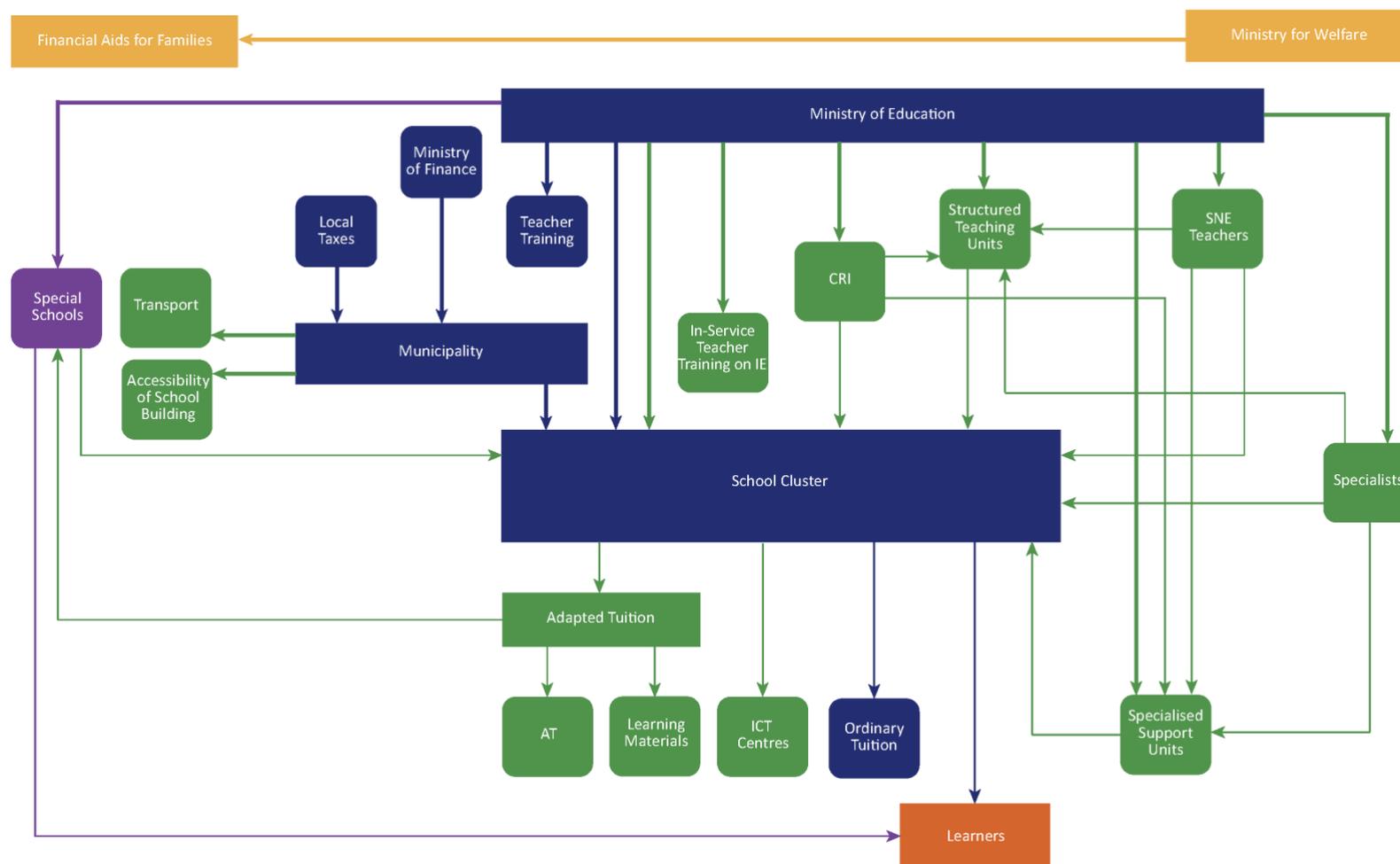
* **Theoretical starting ages** refer to the ages as established by law and regulation for the entry to a programme, actual starting ages may vary depending on the programme.

Annex 3. Resource allocation mechanisms for supporting learners

FPIES Conceptual Project Framework



Annex 4. Mapping Resource Allocation for Inclusive Education in Portugal



Colours indicating:



Health- and welfare-related spending (orange)



Inclusive education-related spending (green)



General education system-related spending (blue)



Learner-related spending (red)



Special school-related spending (purple)

Arrows indicating:



Cash transfer (thick, single-headed arrow)



Cash transfer after application (thick, double-headed arrow)



In-kind transfer, e.g. service provided, methodological or technical support (thin, single-headed arrow)



In-kind transfer after application, e.g. service provided, methodological or technical support (thin, double-headed arrow)



Earmarked grants (broken, single-headed arrow)