



FINANCING POLICIES FOR INCLUSIVE EDUCATION SYSTEMS

Country Report: Italy





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INTRODUCTION

The Constitution states that the Italian Republic guarantees school for all (Article 34) and requires that the mandatory duty of solidarity be fulfilled (Article 2). Moreover, it states that it is the 'duty of the Republic to remove any obstacles constraining the freedom and equality of citizens in order to ensure the full development of the human person' (Article 3).

Italy's education system is organised according to the principles of subsidiarity and school autonomy (Constitution Title V). The State and the regions share legislative competence. Moreover, regions should comply with the provisions of national legislation. Schools are autonomous with regard to didactic, organisational and research activities.

The Constitution of the Italian Republic establishes that it is the duty of the State to provide access to education for all young people living in the country. This should occur regardless of the geographical area that they live in or of their individual social and economic situation.

The central branch administrations of the State, as well as regional, former provincial and local administrations (municipalities) are responsible for setting up and operating educational establishments across the country. This is based on the age of learners, the geographical context of the area and the social conditions of the families living there.

To encourage school attendance for all and implement the universal right to study, various services and support measures are available. Municipalities are responsible for the organisation of transport services in accordance with criteria established at regional level. Transport services for learners with special needs are provided free of charge.

For secondary education (lower and upper), the Regions are responsible for the general planning of the educational offer and the school network.

The Ministry of Education, Universities and Research (MIUR) guarantees the uniformity of national educational provision. It does this by laying down:

- general educational goals;
- specific learning goals based on learners' skills;
- the national curriculum;
- standards related to the quality of educational services;

- general criteria for learner assessment and the organisation of adult education.

Depending on their autonomy (Article 117), schools can be flexible in adapting teaching time, curricula and didactics to the specific needs of their learners. They can also provide extra-curricular education and activities depending on their cultural, social and economic context, as well as through networks and agreements with other schools, universities, agencies and so on.

Administration and governance

Administration and Governance at Regional and Local Level

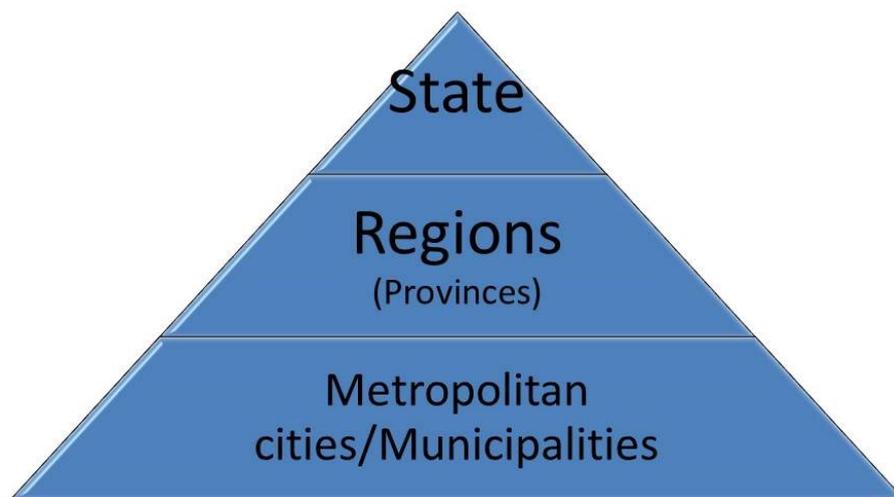


Figure 1. Administration and governance at regional and local level

Administration and governance at regional level

The Regions have a joint legislative role, together with the State, on issues related to education. Conversely, they are solely responsible for the planning, management and provision of vocational education and training through recognised institutions. Through the State-Regions Conference, the Regions work closely with the Ministry of Education and the Ministry of Labour to determine the minimum national standards for the education system and the vocational education and training system.

Education and training issues within the jurisdiction of the Regions are handled by specific offices (Assessorati).

Administration and governance at local level

Local administration includes former Provinces and Municipalities (Comuni) which have responsibilities in different areas and at different levels of the education system.

Provinces were assigned specific functions for upper-secondary education only. Municipalities, often representing small residential communities and restricted areas, are distributed throughout Italy. They have their own or regionally or provincially delegated responsibilities for functions and services relating to pre-primary, primary and lower-secondary schools. Former Provinces and municipalities carry out their specific education-related functions through dedicated offices (Assessorati).

Provinces have now been abolished, as per Law no. 7/2014. Their functions have been transferred to Regions and Metropolitan cities.

Regions and municipalities are mainly financed by local taxation and transfers from the central government.

Organisation of the MIUR

Organisation of the MIUR

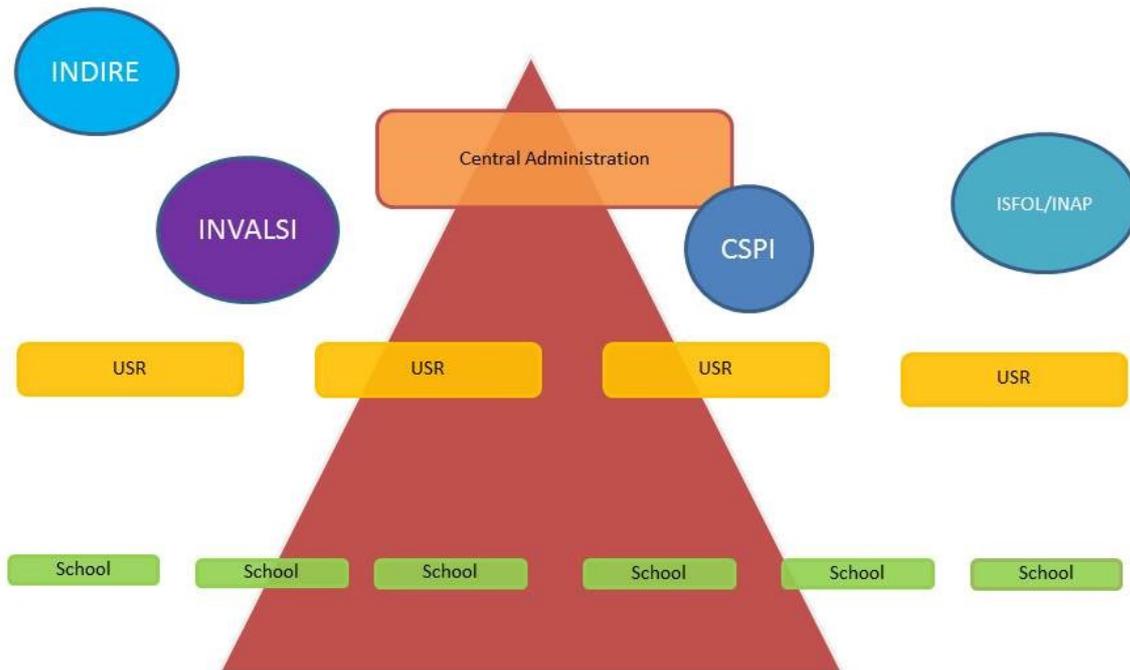


Figure 2. Organisation of the MIUR (see also MIUR-INDIRE, 2014)

The central administration of the Ministry of Education, Universities and Research (MIUR) is in charge of determining policy.

The Regional School Office (Ufficio Scolastico Regionale, USR) is a branch of the MIUR. Usually divided into Local Offices (ATP), the USR oversees general provisions for education, the effectiveness of training actions and adherence to minimum performance requirements and standards.

Local Offices (Ambiti territoriali, ATP) support and advise schools on administrative and accounting procedures and the planning and innovation of the educational offer. They monitor the implementation of provisions on school buildings and safety. They deal with the integration of immigrant learners and learners with special needs and the promotion of learner participation. They monitor compliance with compulsory education in collaboration with municipalities.

Other bodies

The following agencies collaborate with the MIUR:

- National Institute for the Evaluation of the Education System (Istituto nazionale per la valutazione del sistema di istruzione, INVALSI)
- National Institute of Documentation, Innovation and Educational Research (Istituto Nazionale di Documentazione, Innovazione e Ricerca Educativa, INDIRE).

For three-year vocational training courses, the Institute for Analysis of Public Policies (INAPP) is the reference body for research and monitoring, policy and guidance to the Regions.

These bodies have statutory, scientific, organisational, regulatory, administrative and financial autonomy. They are financed by grants from the central government, and other (private or public) grants.

PUBLIC EXPENDITURE ON EDUCATIONAL INSTITUTIONS (GENERAL FUNDING)

MIUR

Italy's requirements for education are consistent with Article 24 of the CRPD. Learners with special educational needs (SEN) are required to be educated in general education classrooms at the schools in the communities in which they live (Zero Project, 2017). They are ensured an equal quality of education with additional support measures, services and accommodations, which are individualised to the needs of each child. National laws also enforce these requirements, which comply with Article 24 of the CRPD and the Revised European Social Chart (Kanter et al., 2014).

A very important factor to be considered when analysing national expenditure for inclusive education is the funding for special teachers. Each class which contains learners with disabilities has one or two support teachers. Support teachers are specialist SEN teachers. They are an integral part of the class teachers' team and participate in all the activities concerning planning and assessment.

Figure 3 shows the increasing number of learners with disabilities (174,404 in the school year 2007/08, increasing to 224,509 in 2016/17).

Graf. 5 - Serie storica degli alunni con disabilità e dei posti di sostegno_AA.SS. 2007/2008 – 2016/2017

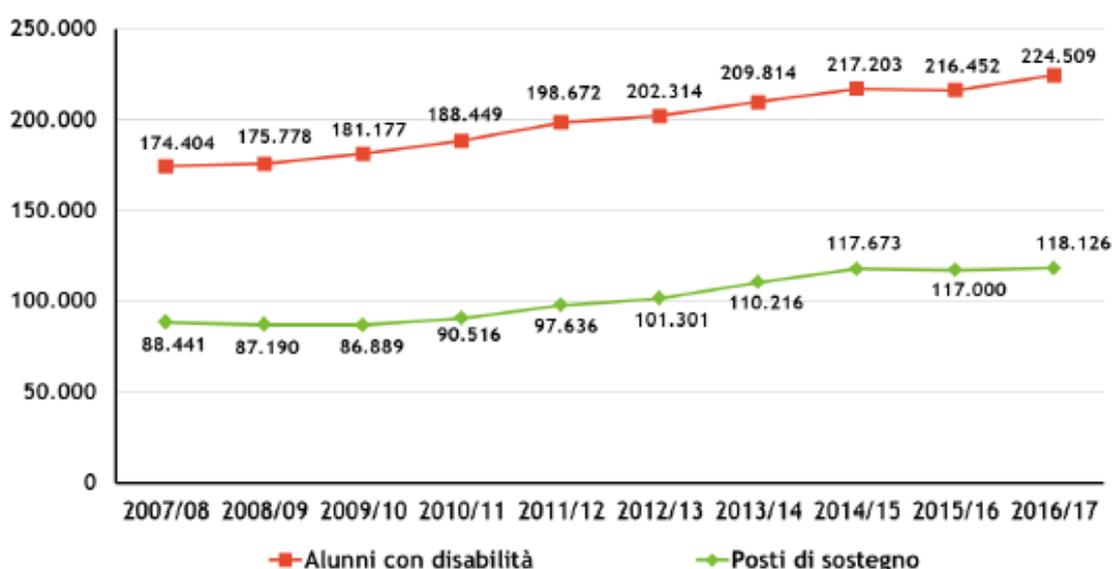


Figure 3. Historical series on learners with disabilities and support teachers (MIUR, 2016)

The Italian Ministry of Education, Universities and Research (MIUR) provides 80% of school funding, covering core services (salaries and school operations) (OECD, 2016: table B1.2).

Expenditure by educational institutions per learner is largely influenced by:

- Teachers and school staff salaries
- Pension system
- Instructional and teaching hours
- Costs of teaching materials and facilities
- Programmes provided
- Number of learners enrolled in the educational system

As stated by the OECD (2016), most expenditure in Italy goes on educational staff salaries. The remainder goes on other expenditure items in the list.

According to OECD data, public expenditure in educational institutions in Italy declined by 14% between 2008 and 2013. This is the result of a change in the distribution of public expenditure and the effects of Law no. 133/2008. This law aims to reduce public expenditure by increasing the ratio of learners to teachers.

As a result, public expenditure as a share of GDP decreased by 7% between 2008 and 2013. In 2013, Italy ranked fourth-lowest among OECD countries in terms of total expenditure on education as a share of GDP: 4% compared to the OECD average of 5.2% (OECD, 2016: figure 1, table B4.2. See also European Commission/EACEA/Eurydice, 2013).

Expenditure per learner on primary and secondary education decreased by 14% over the same period (OECD, 2016: tables 1 and B1.5a). An increase in tertiary education is due to a decrease in the number of tertiary learners. In Italy, public sources make up most of Italy's expenditure on education (96%).

On a positive note, the 2015 Stability Law reduced the cuts to public funding for higher education envisaged in previous legislation. It also created a specific fund to finance the on-going reform of the school system, into which EUR 1 billion was invested in 2015 and EUR 3 billion in 2016 (European Commission, 2015).

The increase in capital expenditure (EUR 49,066,182,242 in 2014, increasing to EUR 49,157,304,941 in 2015) is due to the Italian Government focus on renewing, maintaining and improving safety in school buildings (Law no. 107, 13 July 2015).

A slight decrease in current expenditure is due to the introduction of public spending cuts.

The increase in personnel expenditure is related to the recruitment of new teaching staff, initiated by the Italian Government according to Law no. 107 of 13 July 2015. This process started in the third quarter of 2015 and will continue in the following years (Eurydice, 2015).

Regions and local authorities

The regions and local authorities provide the other 20% of school funding. This funding is aimed at ancillary services through two types of intervention: direct and indirect. Direct interventions include scholarships, cheques and contributions aimed at enabling school attendance. Indirect interventions comprise some free services, such as transport, meals and textbooks.

Municipalities provide support services and assistance to all learners with disabilities attending schools in their jurisdiction. Non-autonomous learners are also supported by professionals in communication, socialisation and autonomy. These assistants are provided by local authorities. According to data from the National Institute for Statistics (ISTAT, 2016) the average number of assistance hours per learner per week is ten. Municipalities and Regions also provide funds for school buildings and for removing architectural barriers.

As stated by law, this ‘co-participation’ in school funding between central government, regions and local authorities depends on their ability to monitor and guarantee efficacy in provision and involve all levels of government in the inclusion process. It is based on two principles: equality of the system across the country is guaranteed at central level and subsidiarity is the basis of all intervention at local level.

Equality is guaranteed through common principles and essential levels of provision stated by the Ministry. A reform of the essential levels is in course. The new School Reform Act (Law no. 107/2015) allowed the Ministry of Education to define the essential levels of services provided by schools (LEP) (Dlgs 66/2017). Particular attention will be paid to inclusive matters and it will be easier to compare and evaluate school services.

Subsidiarity is both vertical and horizontal, as it is realised through administrative action in collaboration with associations and the third sector.

The multi-level framework for inclusive education

Since the reform of the second part of the Italian Constitution (art. 114, 133) in 2001, responsibility for social policies has been devolved to Local Authorities. This has led to the Central Authorities having less financial involvement over the years, corresponding to an increase in local funding.

Law no. 328/2000 defines the 'integrated system of interventions and social services'. It states that families, together with municipalities and social services, agree upon an individualised Life Project for their children, aiming towards full integration 'within the family and social life'. Law nos. 328 and 104 also state that local authorities, local health services, social services, schools and families should make framework agreements for the integration of all services necessary for the full inclusion of learners with disabilities. These should be based on their individual potential and aimed at their educational, social and future work life (examples of this were shown during the Country Study Visit). Within these frameworks:

- MIUR is responsible for inclusion policies and their funding;
- local authorities provide ancillary service and assistance;
- regions regulate school assistance (direct and indirect interventions);
- municipalities offer support services and assistance to personal autonomy.

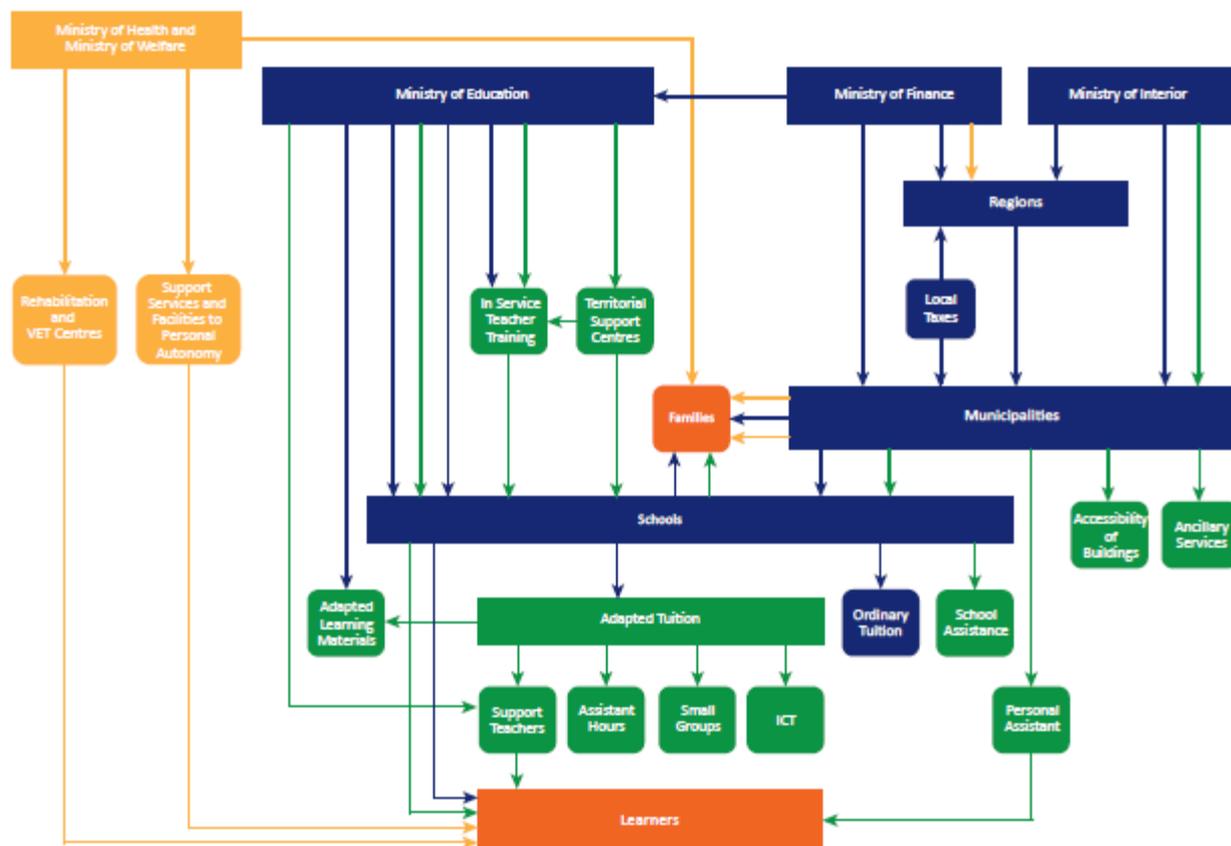


Figure 4. Funding mechanisms in Italy's education system

Learners with disabilities have the right to attend mainstream classes with appropriate teaching support. They have the right to full participation in school life, including summer camps, study visits (accompanied by special staff), etc. Depending on their disability, learners may have assistants provided by local authorities.

Learners have the right to:

- an individual education plan (IEP), drafted by family and schools;
- a social project, drafted by social assistants and experts from the local health board;
- a rehabilitation programme tailored to their individual needs;
- vocational guidance.

The IEP is drawn up jointly by the local health authority, curricular and support teachers and educationists or educational assistants (if required), in collaboration with parents. It includes a description of the interventions planned for the learner in a given period.

The IEP and the Life Project are the basis for allocation. They are foreseen by Law no. 104/1002 and the 2009 'Guidelines for the integration of pupils with disability at school'.

- MIUR provides support teachers to the class (throughput funding – Law no. 104/1992).
- Regions, metropolitan cities and municipalities provide assistants for autonomy and communication, depending on the IEP (input funding – Law no. 104/1992).
- Social services provide educators at home, depending on the social project. Educators concur to the aims of the IEP, providing educational support, as well as support to the family as a whole, if needed (input funding – Law no. 328/2000).
- The health service provides equipment, tools, prostheses and technical aids (input funding).

The MIUR budget plan

The Financial Statements of the Ministry of Education, also called the budget plan of expenditure, are organised by missions and programmes.

The missions describe the general objectives pursued through State expenditure. The programmes – parliamentary voting units with regard to expenditure – represent the missions allocated to groups of homogeneous activities, in order to achieve their objectives.

Starting with the financial law for the three financial years from 2017 to 2019, in implementation of the delegation of article 40 letter e), the programmes are divided into shares. These describe in detail the resources allocated to the programme and its activities. Mainly for administrative reasons, the activities are further divided into chapters, and the latter into management plans.

Every budget plan of expenditure opens with an 'integrative note'. This enriches the information contained in the financial statements, indicating the content and objectives of the various budget items. It provides the criteria identifying the Ministry's objectives. It also provides the expenditure programmes and the related indicators that quantify the expected results, in line with the available programme resources.

The total Ministry of Education budget for the 2017 financial year is just over EUR 56.2 billion. Mission 22, Education: School, has an incidence of about 82%.

Table 1. Ministry of Education Budget 2017

Missions	Budget 2017 (€)	Incidence %
22: 1 Education school	45,906,467,667	81.68
23: 2 College and post-graduate training	7,936,106,705	14.12
17: 3 Research and innovation	2,277,453,957	4.05
32: 4 Institutional and general public services	82,455,823	0.15
Total	56,202,484,152	100

For the purpose of the FPIES project, we can only consider Mission 22, Education: School, in its entirety. As Table 2 shows, this mission consists of eight areas of homogeneous activities (programmes).

Table 2. Programmes within Mission 22, Education: School

Programmes	Budget 2017 (€)	Incidence %
22.1 Planning and co-ordination of school education	715,629,444	1.56
22.8 Initiatives for the development of the education system and the right to study	253,487,051	0.55
22.9 Non-state educational institutions	575,873,089	1.25
22.15 Post-secondary education, adult education and essential levels for education and vocational training	13,616,002	0.03
22.16 Implementation of guidelines and policies at a local level in education	137,844,876	0.3
22.17 First-cycle education	28,889,450,421	62.93
22.18 Second-cycle education	14,894,078,545	32.44
22.19 Recruitment and updating of school principals and school staff for education	426,488,239	0.93
Total	45,906,467,667	100

The financial measures proposed in the aforementioned Mission's programmes include:

- personnel expenses: administrative, school managers, teachers and administrative, technical and auxiliary staff, as well as support staff;
- funding for digital innovation and education;
- purchase of equipment and computer equipment aimed at the development of educational technology in schools (general funding).

Among the 'Initiatives for the development of the education system and the right to study' (throughput funding) included in the programme, particular importance is given to:

- the 'Promotion and support for education initiatives, including the protection of linguistic minorities';
- the costs of initiatives aimed at promoting the participation of families and learners in school life;
- funding for the support of voluntary social work, work-based learning, combatting early school leaving, guidance, prevention of youth problems and the fight against drug addiction phenomena;
- financial aid for the quality of education for learners with disabilities and specific learning disorders, hospital and home schooling and the integration of foreign learners;
- initiatives for guidance, prevention of early school leaving.

In terms of consistency of financial allocations in the budget, programmes 17 and 18, relating to the first and second school education cycles, have significant importance. Substantial funding comes from the budget to schools for:

- administrative costs;
- improvements to the educational and training offer (general funding – under Law no. 440);
- the teachers' training offer (collective agreements (CCNL) for instrumental functions, specific tasks, areas at risk – general funding);
- costs of technical equipment and teaching aids (general and throughput funding).

Funding for scholarships and funds to ensure the right to education, scholarships and educational equipment for learners with SEN are input funding.

In-service Teachers' Training Plan

According to their collective employment agreement, school staff have the right and the duty to undertake in-service training. Law no. 128/2013 introduced the principle of compulsory in-service training.

In Italy there are currently:

- 8,348 educational institutions (aggregating 41,060 schools);
- 819,049 teachers, of which 138,849 are support teachers;
- 7,757,849 enrolled learners, of which 234,658 have disabilities and 757,571 are foreign (MIUR, 2017).

The Italian Ministry of Education is making a great effort to quickly provide additional training to all teachers, whether already employed in schools or newly qualified, in order to face new challenges. Training is provided through university master's and distance learning programmes. Challenges include:

- Learning-centred education
- Information and communication technology
- Inclusive educational practice
- Diverse learning needs and strategies (OECD, 2014).

Attention to inclusion is one of the distinctive features of the Italian school. In order for inclusion to be an everyday part of classroom management, initial or continuing training for support and curricular teachers is very important.

Targeted training for the development of skills in inclusive teaching strategies not only responds to the needs of learners with SEN, but raises the quality of learning for all.

Law no. 107/2015 allocates EUR 40 million for compulsory in-service teacher training in the field of inclusion (general funding).

The priorities of the national In-service Teachers' Training Plan for 2016–2019 are:

- inclusion and disability: the goal is to make the curriculum more flexible and open to different skills, attentive to the growth of complementary skills that contribute to learners' educational development;

- social cohesion and the prevention of global youth problems;
- integration, citizenship and global citizenship skills.

Additional funding for national education system institutions (throughput funding) also comes from cash donations, under Law no. 107 of 13 July 2015. Within the programme is budget chapter 1260: 'Fund for disbursement to the beneficiary schools of cash donations for investment in favour of all the institutions of the national education system, for new school facilities, maintenance and upgrading of existing ones and for supporting interventions that improve the employability of the students'. This relates to the State Budget chapter, which states that these donations are paid by taxpayers who freely choose the school that will benefit. The school receives 90% of the donation. The remaining 10% is merged into an equalisation fund which is distributed to schools that receive less than the national average donation amount.

Research evidence and data from international surveys point to the fact that disadvantaged learners are much more likely to be underachievers. The analyses of PISA 2012 (OECD, 2013) demonstrate that poor performance at age 15 is a result of the cumulative effects of a range of disadvantages. Risk factors include aspects of a learner's background, as well as school composition, the learning environment and the availability of resources (OECD, 2016).

The influence of socio-economic status on students' performance is below the EU average. Although the performance gap between natives and first-generation immigrants is large, second-generation immigrants partially catch up (OECD, 2013). Integrating learners with an immigrant background is a relatively recent issue in Italy (814,187 foreign learners), but it is becoming more and more significant: the proportion of foreign learners rose rapidly from 2.2% of the total number of school learners in 2001/02 to 9% in 2013/14 (Fondazione ISMU, 2015).

MIUR allocates additional resources (throughput funding) to schools that enrol large numbers of disadvantaged learners (European Commission/EACEA/Eurydice, 2016a, fig. 5.1).

Throughput funding is also distributed following applications to open calls published by the Ministry of Education. For instance, in the school year 2015/16, additional support was allocated via projects to improve the integration of disabled learners, unaccompanied foreign minors, Roma and other disadvantaged groups. It was also allocated for preventing early school leaving in peripheral metropolitan areas with high rates of school drop-out (*ibid.*, fig. 5.2).



In Italy during the 2015/16 school year, special attention was dedicated to resourcing and monitoring schools attended by unaccompanied foreign minors, through a specific project with earmarked resources (throughput funding). The Ministry's regional branches selected 60 projects submitted by schools or networks of schools following the criteria specified in a national call. The call made specific reference to the number of unaccompanied foreign minors registered in Italy since June 2015. The figures were particularly significant in the regions of Sicily, Latium, Lombardy and Calabria (European Commission/EACEA/Eurydice, 2016a).



National accountability

In the last 20 years, in parallel with the public administration reform, the system of budgetary decisions and the structure of national accounts were reformed. The aim was to streamline the economic and financial planning process and the allocation of public resources.

The new law on public accounting and finance (Law no. 196/2009) renewed the principles for construction and co-ordination in budgetary decisions. This was followed by Legislative Decree no. 216 of 26 November 2010, which identifies the standard requirements and the new parameters for calculating the amount of resource allocation to local authorities. This ensures full funding of the basic levels of provision relating to civil and social rights and the fundamental functions of local authorities throughout the national territory.

Subsequently, Law no. 39/2011 intervened in modifying some elements of Law no. 196/2009. It aimed to ensure a coherent financial planning cycle with the new rules and procedures established by the European Union. It had three main objectives:

- the unitary government of Italian public finances;
- improvements in information and transparency;
- improvements in public spending quality.

Thus, framework budgeting legislation has also been homogenised for all public entities by co-ordinating procedures among the different levels of government.

A further important change introduced by Law no. 196/2009 is the functional reclassification of the state budget in missions (34) and programmes (172).

By Legislative Decree no. 90 of 12 May 2016, the national budget has been further reorganised. This started on 1 January 2017 with the introduction of the 'actions'. The actions aim to make the activities, policies and services provided by the spending programmes more readable and to support the monitoring and evaluation of results.

This gives greater evidence of the amount of resources assigned to the functions and objectives pursued by public expenditure. Ownership for each programme and its actions, and therefore resources, is precisely defined and linked to administrative responsibility. This enables full accountability.

In January 2017, by decree of the President of the Council, the 'Methodological note on the calculation procedure for the establishment of standard requirements and the allocation coefficients of the same requirements for the fundamental functions

of education, territory, environment, transport, as well as for other general functions of provinces and metropolitan cities' was approved. The decree has been adopted according to Legislative Decree 216 of 2010 (Provisions for the determination of costs and standard requirements of municipalities, metropolitan cities and states).

As part of the public administration, schools also have to make their planning and budgeting decisions transparent.

School autonomy

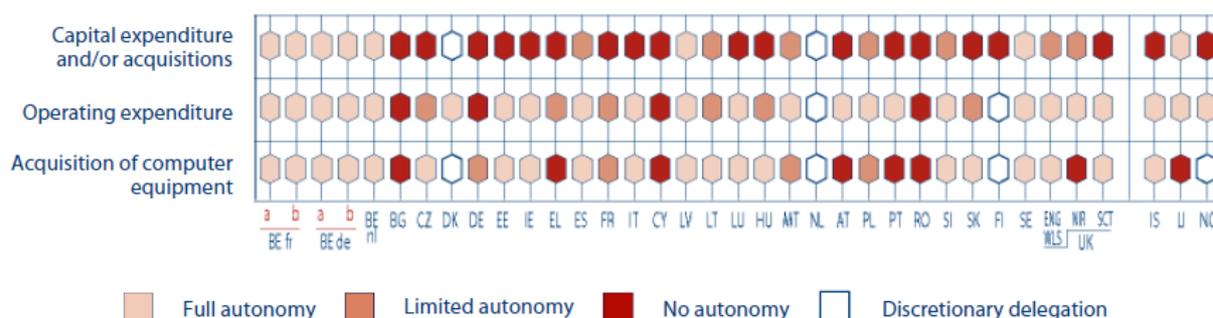
Schools at pre-primary, primary and secondary level have teaching, organisational and research autonomy. Schools were granted autonomy and legal status in 2000 (for a description of autonomy in Italian schools and a comparison at European level, see Eurydice, 2007). Article 117 of the Constitution itself recognises the autonomy of schools.¹

According to Law no. 107/2015, based on the three-year budgetary term, each school draws up its own Three-Year Plan for the Educational Offer (*Piano dell'offerta formativa*, PTOF). This is the basic document setting out the cultural and planning identity of the school. It must be consistent with the general and educational objectives of the various kinds of study and specialisms set at national level, while reflecting cultural, social and economic requirements at local level.

According to DL 44/2001, schools receive financial resources from the MIUR. However, they can also receive funding from other public bodies (for example regions or municipalities), or raise funding privately.

¹ Article 117 gives the state power to determine general education standards, fundamental principles and basic levels of service across the whole country. Regions are responsible for legislating on teaching matters, 'subject to the provisions for school autonomy'. These general measures of 2001 complete the specific legislative framework for school autonomy: Act No. 59, 15 March 1997.

**Figure 2.1: Autonomy of schools in the use of public funds,
ISCED 1 and 2, 2006/07**



Source: Eurydice.

Figure 5. Autonomy of schools in the use of public funds. ISCED 1 and 2, 2006/07

Planning and accountability

International evidence shows that autonomy only works if coupled with accountability (Hanushek and Woessmann, 2011). Higher school management quality is strongly associated with better educational outcomes (Bloom et al., 2015).

Law no. 107/2015 moves in this direction, empowering the school manager’s role and responsibilities. The success of this measure will depend on the proper implementation of the planned evaluation system of school head teachers, which aims to increase their accountability (Checchi and De Paola, 2015).

The Annual Programme (school budget)

The school budget (annual programme) is linked to the PTOF and is the basic accounting document in schools. It is drawn up based on the criteria of efficiency, effectiveness and economy and is a flexible document, with a mid-term review on 30 June at each school.

The annual programme is the realisation in financial terms of the PTOF. It is accompanied by a technical report prepared by the head teacher, relating school functioning and projects to each budget item. A report also accompanies the reviewed budget, giving evidence of the degree of realisation of each objective. These reports give evidence to qualitative (objectives to be achieved) and quantitative aspects (financial aspects).

The control on financial management is carried out both by the school board and the Board of Auditors. Evidence for accounting documents is made public through the school website.

For a long time, Italian schools have decided overwhelmingly to communicate the so-called ‘social budget’ to stakeholders. This addresses two aspects: the social-educational-organisational aspect and the purely financial one. Through an analysis of the first aspect, the school communicates to its stakeholders (parents, learners and teachers, together with all the people and institutions of the territory):

- the school’s organisation;
- the results obtained;
- how the school intends to improve its educational action.

Through an analysis of the second aspect, the school communicates how it used the funds provided by the Ministry, other local authorities or private individuals.

The National System for Evaluation of Schools (SNV)

The aim of the National System for Evaluation of Schools (SNV) is to improve the educational offer. This means improving all the processes that schools undertake, with all subjects involved, to raise learners’ achievements, educational offer, quality and innovation in the learning environment.

School evaluation is carried out in three stages:

- School self-evaluation. Relying on data provided by MIUR and the National Institute for the Evaluation of the Education System (INVALSI), schools draw up their Self-Evaluation Report (RAV);
- External evaluation. Carried out by the external evaluation team (NEV) on a sample of schools, following protocols drawn up by INVALSI. Schools use the evaluation results to redefine their Improvement Plans.
- Social accountability. Schools publish and disseminate the evaluation results to ensure the transparency of their actions.

The implementation of the SNV started in 2014/15. The key to the success of this system is ensuring that all relevant actors and stakeholders are involved.

The SNV followed a three-year cycle:

1. In spring 2015, each school was provided with a wide set of data on its resources, processes and outcomes. They were then asked to produce a self-assessment report, identifying strengths and weaknesses, based on a standardised template from INVALSI. Each school also had to identify areas to be improved and targets to be met over the following years. These reports

also include the results of the annual INVALSI standardised learner tests, to help parents make an informed choice when selecting a school.

Through the drafting of the Self-Evaluation Report (RAV) and, most of all, through the Improvement Plan (PdM) contained in PTOF, educational institutions are rethinking and improving their educational activity. The RAV analyses the context in terms of resources, the educational achievements and the processes underlying them in detail.

2. Evaluation by external teams, co-ordinated by an inspector, which aim to visit up to 10% of all schools each year.
3. Public reporting starts with the publication of the self-assessment report. It continues with the results of the improvement process during the three-year cycle, with a view to offering stakeholders greater transparency.²

School Leaders' Evaluation

The School Leaders' Evaluation started in 2017 and consists of a self-evaluation followed by an external evaluation. The head teacher is also evaluated, taking into consideration the achievement of the objectives set in the PdM.

² All relevant data on Italian schools is available at: cercalatuascuola.istruzione.it/cercalatuascuola

SUMMARY OF PERCEIVED STRENGTHS AND CHALLENGES OF THE CURRENT FUNDING MECHANISMS

The inclusive system is a strength, because there are no barriers to access and opportunities.

There are still areas of improvement, such as the possibility for schools to develop their autonomy and networking. According to DPR 275/99, schools can be flexible in adapting teaching time, curricula and didactics to learners' specific learning needs. They can also provide extra-curricular education and activities depending on their cultural, social and economic context, as well as through networks and agreements with other schools, universities, agencies, etc. The Good School Reform Act moves in this direction (see Annex 2).

The personalisation of the learner's Life Project, on which all criteria for provisions are based, is a strength.

Improvements can be made in the integration between two different legislations (on disability and on social service). Decisions on school support are made by the school, but decisions on home support are made by social services. An integrated process involving schools and social services could improve the mechanisms to provide these different kinds of support.

As described above, the constitutional reform performed by Law no. 3/2001 led to a significant increase in regional functions.

At national level, the State-Region relations are developed through conferences (State-Regions, State-Municipalities and Unified Conference). These bodies are composed of representatives from central and local level executive powers. The basic principle is co-operative government.

At regional level, co-operation in the school system is carried out through Region-USR (MIUR regional offices) conferences.

There are also Workgroups for Inclusion. These are composed of teachers, medical staff, parents and other professionals (social services, psychologists, physiotherapists, etc.) involved in the learners' education and life:

- at regional level (GLIR);

- at provincial level (GLIP, now GIT – at territorial level³);
- at school level (GLI).

Improvement would be made by the redefinition of workgroups. The reform of the inclusion workgroup stated by Law no. 107/2015 is moving in this direction (see Annex 2, with reference to enabling legislative decree on inclusion, point 6, b).

Law no. 104/1992 foresees that all institutions that contribute to the educational inclusion of learners with disabilities should sign a framework agreement. This would aim to regulate, integrate and co-ordinate the policies of entities planning educational, social and health intervention aimed at disabled learners enrolled in schools and in Education and Vocational Training, in a context of overall allocation of functions and funding.

Over 20 years of monitoring since Law no. 104 was brought into force has shown that it has only been successful in some areas of the country. This is due to the variety of organisations involved (health authorities, municipalities, schools, MIUR provincial office, training institution and stakeholders' associations) and the complexity of the procedures to reach the agreement.

Nonetheless, there are some very interesting experiences carried out at the level of local health and social services (as stated by Law no. 328/2000, framework law on social services), through territorial agreements for inclusion.

Some public administration reforms are moving towards easier procedures, but some are still underway.

Law no. 56/2014 abolished the provinces as local authorities, transferring all competencies either to regions or to municipalities (single or associated). This reform process is still underway, involving functions and financing. There is still a lack of regulation in the social field (which is the principal resource tool for programming interventions at local level, as seen in the financial data observed above).

A future improvement could be a framework agreement between central administrations and the Unified Conference.

Except for schools, where public intervention lies on educational provision, the majority of public intervention for people with disabilities lies in economic support.

³ According to Legislative decree no. 66/2017, the GIT is composed of head teachers and teachers. Its function has also changed, and it is now a group for the evaluation of resources for inclusive education at territorial level.

Indeed, the Italian welfare model is still generally based on families. Therefore families often report the feeling of being alone when coping with their children's disabilities.

The response to the above highlighted criticisms is service integration. It is known that it can produce positive outcomes for users, carers and the organisations involved. It can create the conditions for services to provide a comprehensive, person-centred approach and respond more quickly and effectively to users' needs.

In February 2013, the European Commission adopted the Social Investment Package (SIP). It highlights that social services play a pivotal role in ensuring effective and efficient social protection. They are a smart and sustainable investment, since they have a preventive, activating and enabling function. In particular, the SIP stresses the critical role of high quality, integrated and personalised services in:

- developing people's skills and capabilities;
- improving people's opportunities;
- helping people make the most of their potential throughout their life.

Some pilot experiences, carried out at socio-sanitary district level through territorial agreements for inclusion, are experimenting with the model below (Fusacchia, 2016).

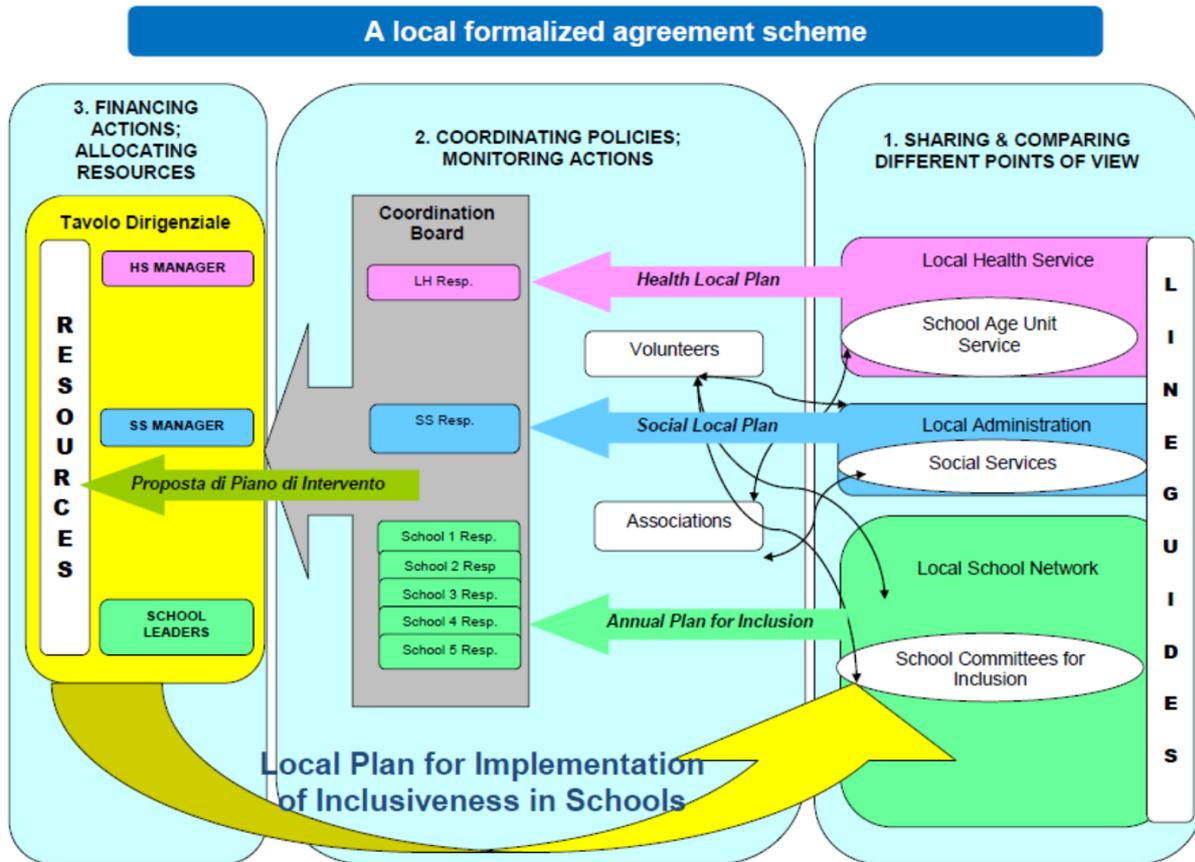


Figure 6. A local formalised agreement scheme

The map illustrates a possible model for functioning of local agreements at socio-sanitary district level between all authorities involved (local health service for mental health and rehabilitation in developmental age and socio-sanitary district, social services for municipalities, schools and school networks). It also involves the so-called third sector.

The agreement envisages a progressive development in service integration, focused on the school environment, in three steps (cultures, policies, actions). The agreement procedures identify priorities and shared goals to achieve through intervention by:

- sharing common 'guidelines' on procedures aimed at the integration of services;
- harmonising the three plans drafted by each authority (the 'Annual Plan for Inclusion' by schools, the 'Local Implementation Plan' by socio-sanitary districts and the 'Social Plan' by municipalities).



These priorities and goals should come together in an agreed 'Action Plan for Inclusion at School'. On this basis, each authority should allocate resources, thereby carrying out co-designed actions. A monitoring process would allow the redefinition of the guidelines, in a virtuous cycle made from the creation of a new shared 'culture' of social inclusion at school.



MAIN LEGISLATIVE SOURCES

On public administration:

Constitution of the Italian Republic

Law no. 59/1997 (Bassanini Act), Delegation to local authorities of central administrative function (vertical subsidiarity)

Legislative Decree no. 300/1999, Reorganization on Government and Public Administration Act

Presidential Decree no. 275/1999, School Autonomy

Law no. 3/2001, Modifications to Title V of the Constitution (Horizontal subsidiarity and School Autonomy)

Legislative Decree no. 165/2001, General Rules on Public Administration Act

Law no. 56/2014, Reorganization of Local Administration System (Abolishes Provinces, creates metropolitan cities and municipalities unions)

On school system:

Constitution of the Italian Republic

Legislative Decree no. 297/1994, School Act

Law no. 169/2008, Reform of Primary Education Curriculum

DPR 87, 88, 89 2010 Reform of Secondary Education Curriculum

Presidential Decree no. 263/2012, Reform of Adult Education

Law no. 107/2015, School Reform Act

On learners with SEN:

Law no. 104/1992, Framework Law on Disabilities

Law no. 328/2000, Framework Law on Social Services

Law no. 18 of 3 March 2009, Ratification of the UN Convention on the Rights of Persons with Disabilities

MIUR 'Guidelines for the integration of pupils with disability at school' 2009

Ministerial Directive 2012 on Pupils with SEN

MIUR 'Guidelines for the inclusion of foreign pupils at school' 2006 and 2014

Dlgs 66/2017: Legislative Decree no. 66 of 13 April 2017, 'Promotion of inclusive education for pupils with disabilities (enabled by Law no. 107/2015)'

On public and school funding and accountability:

Law no. 440/1997, Instituting the central fund for enlargement school educational offer and equalization intervention

Presidential Decree no. 275/1999, School Autonomy

Interministerial Decree no. 44/2001, General Rules on School Accountability

Ministerial Decree no. 21/2007 on direct school funding (so called 'Capitoloni')

Law no. 196/2009 on public accounting and finance

Legislative Decree no. 216/2010

Law no. 107/2015 School Reform Act

Legislative Decree no. 90/2016, National Budget for Actions

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ANNEX 1: THE ITALIAN EDUCATION SYSTEM

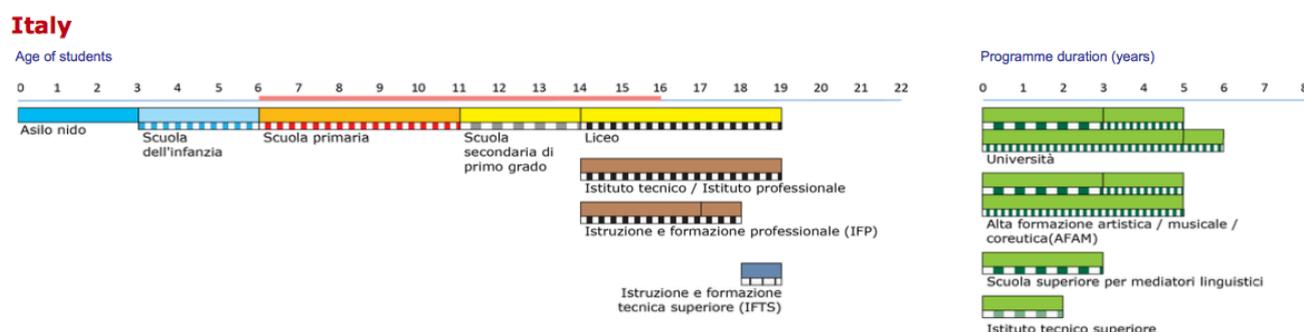


Figure 7. The Italian Education System (European Commission/EACEA/Eurydice, 2016b)

The Italian education system is organised as follows:

- pre-primary school (scuola dell'infanzia) for children between three and six years of age;
- first cycle of education, lasting eight years, made up of:
 - primary education (scuola primaria), lasting five years, for children between 6 and 11 years of age;
 - lower-secondary school (scuola secondaria di I grado), lasting three years, for children between 11 and 14 years of age;
- second cycle of education, offering two different pathways:
 - state upper-secondary school (scuola secondaria di II grado), lasting five years, for learners from 14 to 19 years of age. This is offered by licei, technical institutes and vocational institutes;
 - three and four-year vocational training courses (IFP), organised by the Regions;
- higher education, offered by universities, polytechnics, higher education institutes of art and music (Alta Formazione Artistica e Musicale, AFAM) and higher technical Institutes (Istituti Tecnici Superiori, ITS);
- adult education and training for people whose age puts them at risk of dropping out of school (learners aged 16–18). It should be included in mainstream school reintroduction/coaching pathways. It also targets those who, despite completing compulsory education, have left the school system and wish to re-join it. (MIUR-INDIRE, 2014; Grimaldi and Serpieri, 2012).

ANNEX 2: THE GOOD SCHOOL REFORM



The Italian Government adopted *La buona scuola* (The Good School) reform of the national education and training system in July 2015. This reform foresees changes in several aspects of education and training provision management and of the curricula.

The main aims of Law no. 107/2015 (the Good School Reform Act) are:

- to affirm the central role of the school in the knowledge society;
- to raise the education levels and skills of all learners, following their individual learning times and styles, in order to counteract inequalities and prevent school drop-out;
- to create open schools as permanent labs for research, experimentation and educational innovation and participation and education for active citizenship;
- to guarantee the lifelong right to study, equal opportunities and learners' achievements;
- the enhancement of the school community and its professional development through interactive collaboration and planning with families and the local community as a whole (local entities, authorities, associations, non-government organisations, etc.).

Since all learners with SEN attend mainstream schools, the reform is also aimed at ensuring good quality in education and better job opportunities for them.

The Good School Reform: an overview

Curricular activities

Primary schools have the task of boosting English, music and physical education. Lower-secondary schools have the task of strengthening the study of foreign

languages and environmental education. Upper-secondary schools have the task of strengthening disciplinary teaching in foreign languages (Clil), mathematical and logical skills, art and intercultural education.

Work-based learning

The law introduces a new vision of vocational education and training, with learners spending many hours (from 200 to 400 each year) in work-based learning.

This can either be arranged during the school year or in the summer holidays, and can also take place abroad. The law foresees the creation of a number of tools and mechanisms to allow work-based learning to take place. These include a statute defining the rights and duties of learners engaged in the schemes and a national repository of companies and organisations that offer places for alternating school-work programmes.

To better link secondary education to university programmes, schools can offer optional subjects that may be useful for higher learning.

The reform places particular emphasis on digital skills. The Ministry of Education has adopted a national plan for digital education. This foresees the development of coding skills and computational thinking for primary-aged learners.

The law also introduces provisions (especially in terms of simplified procedures) to support post-secondary education at Technical Institutes (Istituti Tecnici Superiori-ITS) as alternative pathways to university. These are two-year programmes that offer specialised technical training. They are managed by public-private foundations at local level.

To improve dialogue between the education system and the world of work and to boost competence-based didactics, schools can also create 'local laboratories for employability'. These are multilateral organisations, involving public and private bodies, chambers of commerce, universities, employers' associations and trade unions, VET providers and companies.

School autonomy

The law foresees the creation of local school networks. These networks were established in July 2016 and are managed by regional schools' offices. They aim to allow better use of resources, common management of administrative functions and activities and the realisation of locally relevant projects or initiatives for didactics, education, sports or culture.

The law provides schools with more teachers (100,000, plus a further 50,000 via a public competition). These teachers cover curricular activities and allow schools to plan new extra-curricular activities, cope with new learners' needs and improve services, including in inclusion.

School leaders are responsible for planning the school's main goals over a three-year period, following the three-year budgetary term (Three-Year Plan for the Educational Offer, PTOF). The goals are shared with teachers and parents and managed and monitored by school leaders.

The three-year plan outlines the following:

- the number of teachers required, including teachers for special needs education and teachers to enhance learners' competences;
- administrative staff required;
- equipment and facilities required;
- improvement plans from the Self-Evaluation Report;
- work-based learning activities;
- actions based on the national plan for digital education.

The new law introduced provisions for compulsory, on-the-job teacher training and evaluation. The PTOFs are linked to a national three-year teacher and school staff training plan, financed by the Ministry at a cost of EUR 120 million. It considers all the training needs in each school, including training on inclusive practices, information and awareness.

Accountability

The law foresees the implementation of the National System for Evaluation of schools (SNV). The SNV aims to improve the educational offer, including all the processes that schools undertake, with all subjects involved. This, in turn, raises learners' achievements and the quality of and innovation in the learning environment.

Through the drafting of the Self-Evaluation Report (RAV) and most of all, through the Improvement Plan (PdM) contained in the PTOF, educational institutions are rethinking and improving their educational activity.

Enabling legislative decrees

The legislative decrees were approved by the Council of Ministers on 7 April 2017, after a long period of consultation in parliamentary offices and in the relevant committees. Hundreds of experts and members of trade unions and parents', learners', teachers' and families' associations took part.

The decrees put learners at the centre of an educational project that starts from birth, through a six-year Integrated System of Education. This gives everyone equal access to quality education and fosters their learning achievements.

The decrees also aim to enhance the teaching profession, through the quality of initial and in-service training and recruitment.

The decrees adopted concern:

1. the initial teacher training system for lower- and upper-secondary education;
2. the promotion of inclusion for learners with disabilities;
3. the revision of VET pathways;
4. the establishment of the Integrated System of Education from birth to six years of age;
5. measures to promote the right to education;
6. the promotion of Humanities;
7. the reorganisation of the legislation on Italian schools abroad;
8. the adaptation of the legislation on assessment, the certification of learners' competences and State Examinations.

1. Initial teacher training and recruitment for lower- and upper-secondary education

The reform on initial teacher training introduces a unitary and co-ordinated system that includes both initial teacher training and the procedures for entering the profession.

The decree ensures high quality initial training in the different disciplines and also requires at least 24 academic credits in teaching methodologies and psycho-anthropo-pedagogical subjects.

Initial training moves towards more inclusive practices, with 10% of the curriculum around curricular teaching and up to 100% for support teacher specialisation.

2. *Inclusion for learners with disabilities*

The decree introduces important innovations through:

- the redefinition of support teachers' initial training;
- the identification of early school leaving (ESL) in education, health and social provision, taking into account different institutional competences;
- the provision of indicators for self-evaluation and the evaluation of school inclusion;
- the revision of criteria and procedures relating to certification;
- the reorganisation of the workgroups for inclusion;
- the provision of compulsory initial and in-service training for school leaders and teachers on pedagogy, didactics and organisation for inclusive education;
- the identification of the in-service training requirements on school inclusiveness for administrative, technical and auxiliary staff, depending on their specific expertise.

It aims to ensure ever more welcoming schools for learners with disabilities. It strengthens the role of families and associations in inclusion processes and involves all school staff, particularly through in-service training.

Initial training for support teachers will include more academic credits in inclusive teaching methods.

Each school will draw a specific Inclusion Plan (IP) within the framework of the Three-Year Plan for the Educational Offer (PTOF).

School teaching and non-teaching staff will also be provided according to the school Inclusion Plan.

Assessment of school inclusiveness has been introduced into the school evaluation (accountability).

3. *Revision of VET pathways*

The VET pathways have been revised to enable a rapid transition from education to work. This flexible framework allows each school to change its educational offer according to the demands and peculiarities of the territory, consistently within the priorities set by the Regions.

Its goal is the ever-increasing personalisation of learning. This will allow learners to acquire and develop skills that help them to access the job market, through an individual education plan.

The integrated VET system will be in force starting in the school year 2018–19. This will guarantee uniformity in the essential levels of provision across the country.

EUR 48 million have been allocated for teaching staff and EUR 25 million for apprenticeships.

4. Integrated System of Education from birth to six years of age

The Good School Reform Act recognises early childhood education (from birth to six-years old) as the first segment of the educational system.

The Integrated System of Education from birth to six years of age ensures ‘equal opportunities in education, care, social development and play, overcoming inequalities and territorial, ethnic and cultural barriers’. Particular attention is paid to children with disabilities.

Through the establishment of the Integrated System, the quality of educational and childcare services will progressively improve throughout the country.

The services will be organised within a framework between the various actors in the field (State, Regions, local bodies).

Early child educators will receive a homogeneous academic initial training.

Family contributions will be uniform across the national territory.

To fund the new system, EUR 239 million per year have been allocated, plus EUR 150 million for school buildings from INAIL.

5. Measures to promote the right to education

The greater participation of learners and families is ensured through the establishment of a national body. It involves learners’ and parents’ associations, the MIUR, other Ministries, Regions and local authorities.

Other measures are intended to promote a welfare system based on national provision levels, free textbooks, tuition fees and free transport.

Over EUR 60 million have been allocated for scholarships, mobility and teaching materials.

6. *Promotion of Humanities and arts*

Music, dance, drama and cinema, figurative and decorative arts, graphic design, and creative writing become part of the national Educational Offer Plan. This allows learners to develop creativity, critical thinking and innovation skills through direct knowledge and practice.

After the National Plan for Digital Education, the three-year National Plan for the Arts will be launched, through an agreement between MIUR and the Mibact (Ministry for Cultural Heritage and Tourism). It will be financed by a fund for EUR 2 million a year.

Schools will draw up their Three-Year Plan for the Educational Offer based on the National Plan for the Arts. They will share laboratories, exhibition spaces and professional tools through networks and common planning. Arts will also be included in work-based learning initiatives, in collaboration with other public and private subjects and with the third sector.

The governance is also shared. In addition to the MIUR and the Mibact, the following will address and co-ordinate activities:

- INDIRE (National Institute for Documentation, Innovation, Educational Research);
- Afam (Higher Music Education and Dance) Institutions;
- universities;
- ITS (Post-secondary Technical Institutes);
- Mibact Institutes;
- Italian Cultural Institutes Abroad;
- public and private subjects.

7. *Italian schools abroad*

Italian schools abroad will be included in the national evaluation system and in all the measures foreseen by the Good School Reform.

The civil service and internships are promoted in Italian training system institutions around the world. Also promoted are major and new synergies with public and private institutions that promote our culture in the world.

A MIUR-Maeci (Ministry of Foreign Affairs) governing body will be set up, with the task of reorganising and co-ordinating the system.

8. Assessment and State Examinations

In the first cycle of education, admission to the next class is always promoted. This is because schools must activate specific strategies to foster the learning achievements of all learners (weaker ones included).

The State examination in upper-secondary school changes. School-work balance activities become an admission requirement, along with the INVALSI (National Institute for the Evaluation of the Education System) National Test.