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# Inclusive Education Systems: The Struggle for Equity and the Promotion of Autonomy in Portugal

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**Abstract:** The universalization of schooling has triggered issues about the organization and management of more inclusive education systems. Several transnational organizations have produced guidelines that have contributed to the concept of inclusive education being incorporated into national educational policies. To identify the ideas underpinning this concept, we mobilized a policy cycle theoretical–methodological proposal. From a thematic analysis of (inter)national texts, four themes emerged: *the recognition of diversity, the struggle for equity, the promotion of school autonomy and the emphasis on the participation of the educational community.* In this article, we analyze the ideas underpinning the themes of *struggle for equity* and *promotion of school autonomy* to analyze the challenges and opportunities resulting from their articulation. Analysis of the Portuguese case revealed that the legal and normative framework shaped by international documents underlines a tension between these two themes, raising questions regarding the practices enacted by national and institutional actors. The findings suggest that equity is conditional on school autonomy; nevertheless, granted autonomy may not translate into improved equity. The extent to which our analysis of the Portuguese case reflects other national contexts where effective autonomy enhances equity remains to be seen.

**Keywords:** inclusive education; policy cycle; thematic analysis; equity; autonomy; Portugal

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## 1. Introduction

The right to education established in the Universal Declaration of Human Rights (UDHR) [1] has come a long way, to the point where its realization requires the organization of an education system that minimizes the risks of exclusion to the limit [2] and that aims at educational success for all [3]. By maintaining the same access routes to the curriculum for all pupils coming from social groups with different cultural capital, most of whom are distant from school cultural capital and, therefore, from powerful knowledge [4], school has established itself as a legitimized route for the conservation of social structures [5]. With the need for education systems to ensure learning opportunities for all, a predictor of more economically sustainable societies [6–9] and upward social mobility [10], various international organizations (e.g., the United Nations (UN), the United Nations Educational, Scientific and Cultural Organization (UNESCO), the Organization for Economic Co-operation and Development (OECD) and the World Bank (WB)) prescribe lines of action through policy texts such as conventions, declarations, recommendations and reports [11] that are reflected at national and local policy levels [12]. These lines of action, on the one hand, disseminate the idea of nationally prescribed curricula and encourage standardized monitoring and evaluation [13–15]; on the other hand, they reaffirm the need for a curriculum adapted to the diversity of the school population and the characteristics of local contexts and principles of curricular justice (we mobilize the Santomé's conception of curricular justice: "curriculum that is designed, put into action, evaluated and researched taking into account the degree to which everything that is decided and done in the classroom respects and meets the needs and urgencies of all social groups" [16]

(p. 9)) and recognition [17,18] fundamental to the achievement of a more inclusive education. Hence, analysis of the Portuguese context brings forward the specificities of a national context where the *struggle for equity* and the *promotion of school autonomy* back up the idea of inclusive education. In line with this, in Portugal, several national texts (e.g., legal diplomas, recommendations and declarations), especially since the Jomtien Declaration [19], provide guidelines for both the autonomy of schools in the flexibilization of the curriculum and for standardized assessment by external mechanisms—a trend also observed in OECD member countries [20]. This trend reflects the idea that education policies derive from a process of globally established meaning making [21] and develop with influences from different interest groups and their networked governance [12,22].

To capture the ideas supporting inclusive education policies, this paper convenes the policy cycle approach proposed by Stephen Ball and colleagues [23,24]. This is a theoretical and methodological approach that assumes that the policy takes place in different contexts of interconnected action that represent arenas of political action dominated by specific interest groups [22]. In this approach, micropolitical processes and the role of actors involved in politics at the local level assume particular importance [22]. In a first phase, the policy cycle was composed of three contexts: the context of influence, the context of text production and the context of practice [23]; later, it was extended by considering the context of effects (outcomes) and the context of policy strategy [24], both of which can be analyzed within the context of practice [25] insofar as they refer to feedback from this context [22].

To identify the ideas that underpin the concept of inclusive education in the Portuguese context, we analyzed the contexts of influence and text production, are symbiotically linked [26]. The context of influence refers to the space in which certain ideas acquire legitimacy and are presented as solutions through international organizations [25], usually at conferences, where results of studies are disseminated and proposals for action are discussed. The context of textual production refers to texts that influence these debates in which different interest groups are present and that, therefore, represent different versions of policies, such as conventions, declarations, legal diplomas, opinions, recommendations, etc. Sharing the analytical framework of the policy cycle, for which policies are not fixed and immutable [27] but rather dynamic and flexible, Slee [28] argues that inclusive education has no determined starting point, with different ideas coexisting that have contributed to the formation of this field. In this line of thought and considering that educational policy presented in the form of text is an element that can be analyzed, interpreted and contextualized [29], we analyzed international and national texts that guide inclusive education policies in Portugal. We identified four themes: *recognizing diversity*, *struggling for equity*, *promoting school autonomy* and *emphasizing the participation of the educational community*. In this article, we analyze the themes of *struggle for equity* and *promotion of school autonomy*, in which we identify statist, democratic, neoliberal and standardized perspectives that are useful to analyze the challenges and opportunities resulting from their articulation with regard to the development of more inclusive education systems. Therefore, we set out the following research questions: What ideas support the themes of *struggle for equity* and *promotion of school autonomy*? What opportunities and challenges are identified in the coordination of these themes for the development of more inclusive education systems?

## 2. Materials and Methods

To answer these questions, we used international and national texts that the Directorate-General for Education (DGE) identifies on its website as guiding inclusive education policies. The documents selected by the DGE were assumed as those framing the legal and normative framework for inclusive education. This option is justified by the functions of this central state service, such as "ensuring the implementation of policies (...) for pre-school education, basic and secondary education and out-of-school education, providing technical support for their formulation and monitoring and evaluating their implementation" [30] (Article 12). Subsequently, we collected other texts that are referenced in these texts pointed out by the DGE and that we considered relevant to answer the questions posed. The docu-

mentary corpus (Table 1) consists of 20 international texts and 13 national texts published between 1948 (UDHR) and 2018 (Legal Framework for Inclusive Education in Portugal, in force until the present). The texts include conventions, declarations, recommendations and legal texts, which are presented in Table 1.

**Table 1.** Policy texts analyzed.

| Organizations | Documents |
| --- | --- |
| United Nations (UN) | Universal Declaration of Human Rights (UDHR) (1948)<br>Standard on Equal Opportunities for Persons with Disabilities (SEOPD) (1993)<br>Sustainable Development Goals (SDGs) (2015) |
| United Nations Educational, Scientific and Cultural Organization (UNESCO) | Jomtien Declaration (1990)<br>Salamanca Declaration (1994)<br>Dakar Declaration (2000)<br>Incheon Declaration (2015)<br>Guide to ensuring inclusion and equity in education (2017)<br>Education for the Sustainable Development Goals: learning objectives (ESDs) (2017) |
| Organization for Economic Co-operation and Development (OECD) | Approaches to Equity in Policy for Lifelong Learning (2003)<br>Education at a Glance (2006; 2012a)<br>Education Policy Outlook (2014)<br>Equity and Quality in Education (2012b) |
| World Health Organization (WHO) and World Bank | World Report on Disability (2011) |
| World Bank (WB) | Education Strategy 2020, Learning for All: Investing in People's Knowledge and Skills for Development (2011) |
| European Commission (EC) | European Disability Strategy 2010–2020 (2010) |
| Council of the European Union (CEU) | Conclusions of the Council and of the Representatives of the Governments of the Member States, meeting within the Council, on Inclusion in Diversity to achieve a High Quality Education For All (2017)Council Recommendation of 22 May 2018 on promoting common values, inclusive education, and the European dimension of teaching (2018) |
| Commission of the European Communities (CEC)Commission of the European Communities (CEC) | Communication from the Commission to the Council and to the European Parliament. Efficiency and equity in European education and training systems (2006) |
| Portuguese Parliament | Basic Law of the Education System (1986)<br>Decree-Law 43/1989, of 3 February—Legal Framework for School Autonomy<br>Decree-Law 115-A/98, of 4 May—Autonomy, Administration and Management Regime of pre-school, basic and secondary education establishments<br>Decree-Law 75/2008, of 22 April—Revision of the Legal Regime of Autonomy, Administration and Management of Schools<br>Decree-Law 54/2018, of 6 July—Legal Framework for Inclusive Education<br>Decree-Law 55/2018, of 6 July—Autonomy and curricular flexibility |
| Member of the Portuguese Government | Order no. 147-B/ME/96 of 1 August 1996. Official Gazette no. 177—II series. Ministry of Education. Lisbon<br>Order no. 6478/2017, 26 July—Profile of Students Leaving Compulsory Education<br>Order no. 5908/2017, 5 July—Implementation of the autonomy and curricular flexibility project for basic and secondary education. |
| Directorate-General for Education (DGE) | Towards Inclusive Education—A Guide to Support Practice (2018) |
| National Association of Special Education Teachers (ANDEE) | Lisbon Declaration on Educational Equity (2015) |
| National Education Council (CNE) | Recommendations (2012, 2014) |

We started from the patterns of meaning found in the set of documents listed in Table 1 to identify ideas that converge to form the political process of inclusive education policies. For analysis of the texts, we used NVivo, a qualitative research software, to demarcate the

ideas found from open codes, and we linked the ideas through axis coding [31,32]. We then followed the phases of the thematic analysis method defined by Braun and Clarke [33], which are presented in Table 2.

**Table 2.** Phases of thematic analysis (adapted from Braun and Clarke [33]).

| Phase | Description of the Process |
| --- | --- |
| 1. Familiarization with the data | Transcribe the data, read and reread the data and note initial ideas. |
| 2. Generating initial codes | Code interesting features of the data in a systematic way across the dataset, grouping relevant data for each code. |
| 3. Searching for themes | Group codes into potential themes, collating all relevant data for each potential theme. |
| 4. Reviewing themes | Check that the themes work in relation to the coded extracts (Level 1) and the whole dataset (Level 2), generating a concept map. |
| 5. Defining and naming themes | Conduct an analysis to refine the specifics of each theme and the whole story the analysis tells, generating clear definitions and names for each theme. |
| 6. Producing the report | The final opportunity for analysis. Select examples of vivid and compelling extracts and conduct a final analysis of the selected data items, relating the analysis to the research question and the literature. |

Braun and Clarke's [33] proposed definition of the phases of the thematic analysis method was essential for organizing and identifying the data. The analysis was undertaken by the three authors of this study, believing that bias is mitigated when the same data are observed by more than one investigator [34]. This corresponds to 'researcher triangulation', one of the four types of triangulation defined by Denzin [34] that qualitative researchers should use to increase the objectivity, truthfulness and validity of social research. In the phases of researching, reviewing, defining and naming the themes, there was a need for several rereadings and to re-generate initial codes due to the identification of new meanings, and there was a back and forth of reflections between the authors on the data throughout the analysis. Although the themes were formed inductively based on the specificities of the data, when the relationships between the text extracts and each subtheme and, in turn, between the subthemes and the themes were verified in the review of the themes, it was necessary to improve both the naming and description of each theme, as well as some subthemes. This phase was accompanied by concept maps produced in the *NVivo* program based on the selection of statements that contributed to the identification of each theme, which allowed for a comprehensive perception of how ideas are linked, enabling new connections. The whole analytical process was characterized by moving back and forth between the influences that were discovered, which required a process of continuous thematic refinement to ensure that themes were related to each other but did not overlap in content. This involved a systematic review of all units of analysis to confirm that they collaborated in a pattern of meaning common to the dataset as a whole.

## 3. Results and Discussion

In this section we seek to answer the research questions previously posed by exploring (i) the influences underpinning the themes of struggling for equity and promoting autonomy and (ii) the opportunities and challenges identified in linking these themes for the development of more inclusive education systems.

The thematic analysis emphasized the theme of *struggling for equity*, encompassing the subthemes of promoting equality, considering economic rationality and implementing mechanisms for monitoring and evaluation, as well as the theme of *promoting autonomy*, supported by the subthemes of decentralization of decision-making power in education systems, greater flexibility and management of the curriculum, access to adequate resources and internal leadership aligned with the principles of inclusive education. The relationship between the subthemes and themes is presented in the conceptual map in Figure 1.

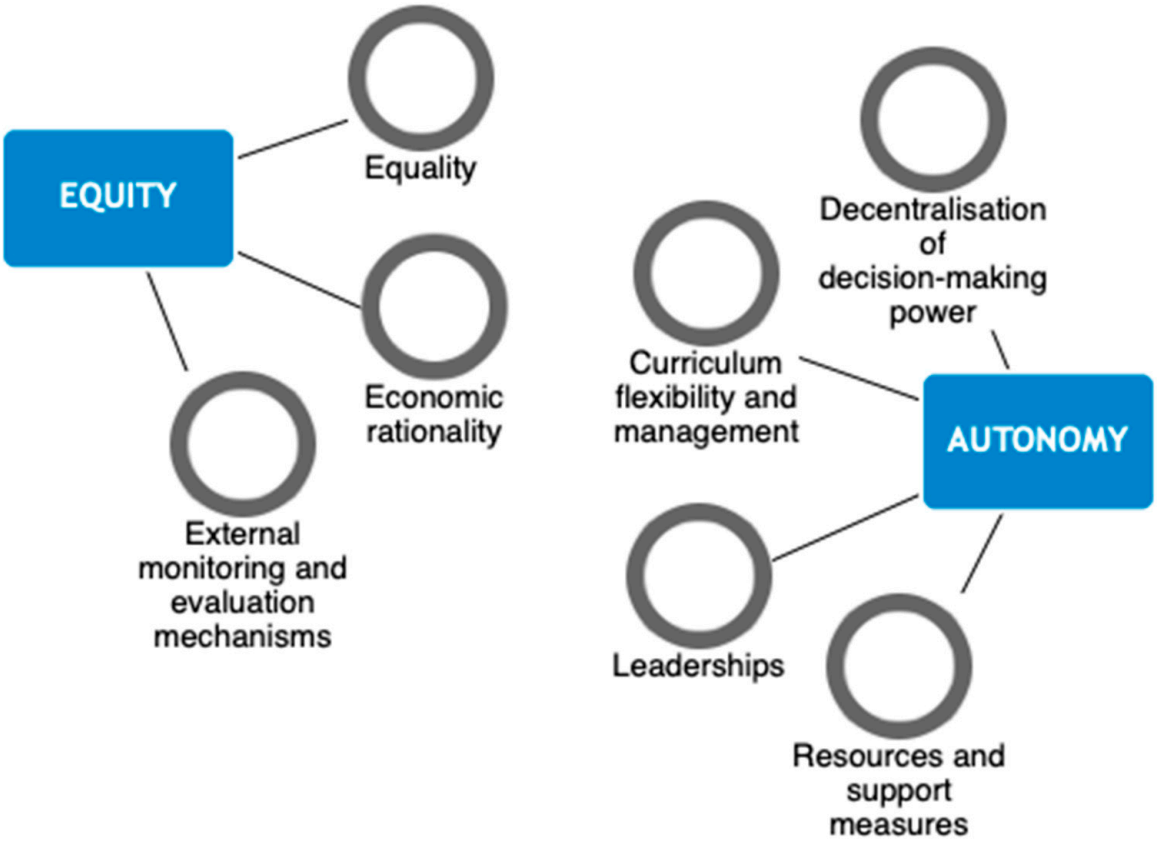



**Figure 1.** Conceptual map of the *struggle for equity* and *promotion of school autonomy* themes and their respective subthemes.

### *3.1. The Struggle for Equity*

The right to education, as enshrined in Article 26 of the UDHR [1], has since been reaffirmed and expanded by various international organizations (e.g., UNESCO; WB; OECD), orienting its realization either towards the promotion of equal opportunities for a just and egalitarian society or towards a neoliberal rationality in which measurement and comparisons have become a central mode of global and national governance towards an equitable society [35–37]. Equity continues to be defined on the basis of notions of equal opportunities [38] but does not respond exclusively to an imperative of social justice and democracy. It is also about "using resources more effectively and increasing the supply of skills that fuel economic growth" [39] (p. 1). The thematic analysis allowed us to identify three subthemes that are presented as the backdrop of the *struggle for equity* theme: (i) equality, (ii) economic rationality, (iii) and monitoring and evaluation.

In Table 3, we present the description of each subtheme and some statements that allowed it to be identified, showing its relationship with the *struggle for equity*.

**Table 3.** Statements that emphasize the *struggle for equity* theme.

| | |
|---|---|
| **Equality: Excerpts referring to the recognition that everyone has the right to equal opportunities to access and succeed in school—regardless of personal and social conditions—in a society that is intended to be fair and equal.** | |
| "Everyone has the right to education. Education shall be free, at least in the elementary and fundamental stages. Elementary education shall be compulsory. Technical and professional education shall be made generally available and higher education shall be equally accessible to all (. . .)" | UDHR [1] |
| "Education as a fundamental human right is (...) an indispensable means to achieve effective participation in twenty-first century societies and economies". | Dakar Declaration [40] |
| "It specifically requires addressing inequalities related to access, participation and learning processes and outcomes". | Guide (for inclusion and equity) [41] |
| "It is the special responsibility of the state to promote the democratization of education, guaranteeing the right to fair and effective equal opportunities in school access and success". | Basic Law 46/86 [42] |
| "The purpose of the educational process in democratic societies is the development and training of all citizens in conditions of equal opportunities and respect for the difference and autonomy of each one". "(...) to create the conditions to ensure the universalization of quality basic education and to promote the educational success of all pupils, and in particular of children and young people who are currently at risk of social and school exclusion". | Order 147-B/ME/96 [43] |
| "Equity, aiming at the realization of equal opportunities". | DL 115-A/98 [44] |
| "Promote social equity by creating conditions for the realization of equal opportunities for all". | DL 75/2008 [45] |
| "(. . .) aims at educational equity, which is understood as ensuring equality in both access and outcomes". | Recommendation [46] |
| "Measures to support learning and inclusion are aimed at adapting to the needs and potential of each student and ensuring the conditions for their full realization". | DL 54/2018 [47] |
| "(. . .) as a priority, the realization of a people-centered education policy that guarantees equal access to public schools, promoting educational success and, in this way, equal opportunities" | DL 55/2018 [48] |
| **Economic Rationality: Excerpts referring to the idea that designing education systems with schools designed for the diversity of all students generates economic benefits.** | |
| "Now more than ever, education must be considered a fundamental dimension of every social, cultural and economic project". | Jomtien Declaration [19] |
| "provide an adequate education for the majority of children and promote the cost-effective efficiency of the entire education system". | Salamanca Declaration [49] |
| "The full participation of people with disabilities in the economy and society is vital for the EU's Europe 2020 strategy to deliver smart, sustainable and inclusive growth". | Communication from the EC [50] |
| "Establishing and maintaining schools that educate all children together is likely to be less costly than setting up a complex system of different types of schools specializing in different groups of children". | Report from WHO & WB [51] |
| "The new strategy focuses on learning for one simple reason: growth, development and poverty reduction depend on the knowledge and skills that people acquire". | Education Strategy 2020 from WB [52] |
| "improving equity in education and preventing school failure is cost-beneficial, even more in the context of the current economic crisis". | Recommendation from OECD [53] |
| "it is clearly less expensive to establish and maintain schools that educate all children together, rather than to establish a complex system of different types of schools specializing in different groups of children". | Lisboa Declaration [54] |
| "It is up to the school principal to define the space where the learning support center will operate in order to make the most of the school's existing resources". | DL 54/2018 [47] |
| **External Mechanisms for Monitoring and Evaluation: Excerpts that refer to the need for monitoring and evaluation of education systems to promote equity.** | |
| "(. . .) develop the exchange of information and experience on issues common to the training systems of the Member States". | Maastricht Treaty [55] |
| "(. . .) develop participatory, responsive and accountable education administration and management systems". | Dakar Declaration [40] |

**Table 3.** *Cont.*

| | |
|---|---|
| "These distinctions can have important equity implications—for example local organizations could be more concerned with particular equity issues in some cases and less concerned in others. These relationships require more examination than has yet occurred, but it cannot be assumed that a decentralized approach will necessarily give more emphasis to equity". | Recommendation from OECD [6] |
| "Member States should develop a culture of evaluation. They should design policies for the whole lifelong learning continuum, which take full account, in a combined and long-term manner, of efficiency and equity requirements". | Communication from the CEC [56] |
| "The role of the State is crucial to regulate standards, improve quality and reduce disparities between regions, communities and schools". | Incheon Declaration [57] |
| "Stability and efficiency of school management, ensuring the existence of communication and information mechanisms". | DL 115-A/98 [44] |
| "In view of these changes, it is necessary to adopt follow-up and monitoring measures (...) by the services and bodies of the Ministry of Education, in order to promote and support new organizational and pedagogical practices". | Order 9726, 2018 [58] |
| "Schools should also define indicators to evaluate the effectiveness of the measures [to support learning and inclusion]". | DL 54/2018 [47] |

The statements supporting the subtheme of equality reiterate that education should be accessible to all individuals in equal measure, without discrimination. In this vein, the need to address inequalities related to access to education, participation and learning outcomes is emphasized, which implies ensuring that all social groups, especially those at risk of social and school exclusion, have adequate opportunities that guarantee them a quality education. In sum, promoting equality is about ensuring that personal and social circumstances are not an obstacle to realizing educational potential and ensuring a basic level of education for all [59].

Another subtheme related to the *struggle for equity* is economic rationality. Organizations such as the UN, WB and WHO suggest that education is a key dimension of social, cultural and economic projects, meaning that investing in quality education for all is beneficial not only for the personal development of learners but also for society as a whole. The WB [52] and the OECD [53] justify investing in education on the basis of the impact it has on poverty reduction. UNESCO [49], the WB [52] and the ANDEE [54] point out that it is more efficient to use the same resources to school all students together rather than setting up a complex system of different types of schools specializing in different groups of students, evidencing the cost-effectiveness of the education system. We believe that this perspective of using the same resources for all can legitimize the prioritization of efficiency over quality, i.e., not investing in the most appropriate resources to achieve inclusive education, affecting the most vulnerable groups and widening inequalities.

Orientation for education systems to develop monitoring and evaluation mechanisms is another aspect pointed out to ensure equity. The Maastricht Treaty, for example, encourages the exchange of information and experience on issues common to Member States' education systems to identify challenges and share good practice. UNESCO [19] even assigns the state a primary role in regulating standards, improving quality and reducing disparities between regions, communities and schools. At the national level [44,46,58], the need for centralized monitoring and evaluation actions is corroborated to ensure educational equity in terms of both access to education and educational outcomes. In these international and national discourses, monitoring and evaluation processes are presented as essential to identify inequalities and adjust educational policies and practices; however, we consider that when framed within a standardized approach, they may not consider the singularities of the contexts, which may hinder the achievement of equal opportunities. In line with this analysis, we invoke Field, Kuczera and Pont [59] and Fullan [60], who point out that achieving equity in education requires a holistic approach involving both public policy measures and decentralized actions within schools and communities. This promotes

inclusion and responds to the specific needs of each educational context, which brings us to the next theme: *the promotion of school autonomy*.

### 3.2. The Promotion of School Autonomy

Promoting school autonomy has been identified as an essential element for improving education systems [3,17]. In Table 4, we point out some statements that allowed us to identify the subthemes that are grouped in this theme: (i) processes of decentralization of the decision-making power of educational systems, (ii) making the curriculum more flexible and managing it locally, (iii) promoting internal leadership and (iv) making resources and support measures available and profitable. Table 4 presents a description of each subtheme and some statements that allowed it to be identified, showing its relationship with the *promotion of school autonomy*.

**Table 4.** Statements that emphasize the theme of *promotion of school autonomy*.

| | |
|---|---|
| **Decentralization Processes: Excerpts referring to processes of redistribution of competences at various levels of administration of the education system.** | |
| "establish planning, supervision and evaluation mechanisms (...) for children and adults with special educational needs in a decentralised approach" | Salamanca Declaration [46] |
| "Many Member States (...) have made efforts to improve efficiency through decentralisation by giving individual schools more leeway in determining course content, allocating budgets and making staffing decisions". | Communication from the CEC [56] |
| "it is important to extend school autonomy (...) by creating conditions that empower schools at local and regional level". | Recommendation from OECD [61] |
| "Decentralize, deconcentrate and diversify educational structures and actions in order to provide a correct adaptation to realities". | Basic Law 46/86 [42] |
| "Education reform cannot be achieved without the reorganization of educational administration, with a view to reversing the tradition of over-centralized management and transferring decision-making powers to the regional and local levels". | DL 43/89 [62] |
| "it seems clear that the school network and stock, as a result of successive additions, require reorganization and adaptation to the needs of children and young people (...)" | Order 147-B/ME/96 [43] |
| [the school] "must (...) build its autonomy on the basis of the community in which it operates, its problems and potential, relying on a new attitude on the part of the central, regional and local administration, which will enable it to respond better to the challenges" | DL 115-A/98 [44] |
| "school autonomy and decentralization are fundamental aspects of a new organization of education, with the aim of achieving democratization, equal opportunities and the quality of the public education service in the life of the school". | |
| "The CNE recommends encouraging the conclusion of autonomy contracts between school clusters and the Ministry of Education, with a view to broadening responsibility for educational processes and outcomes". | Recommendation from CNE [63] |
| "Schools can develop partnerships with each other, with municipalities and with other institutions in the community that allow them to maximize synergies, skills and local resources, promoting coordinated responses". | DL 54/2018 [47] |
| **Curriculum Flexibility and Management: Excerpts referring to the development of curriculum processes that correspond to the specificities of all learners and school contexts.** | |
| "Allow curricula to be flexible and adaptable and to add different elements to them as necessary". (Article 6) | UN, 1993 [64] |
| "They should be called upon to develop more flexible management, to resize teaching resources, to diversify educational offerings". | Salamanca Declaration [49] |
| "Put simply, education systems need to develop more challenging and more supportive learning environments and learn to be more flexible and effective in improving learning outcomes". | Recommendation from OECD [65] |
| "it is important to offer flexible learning pathways and also the recognition, validation and certification of acquired knowledge, skills and competences". | Incheon Declaration [57] |
| "Flexibility in curriculum policy that allows primary and secondary schools to develop locally relevant content and projects". | EDS from UNESCO [66] |

**Table 4.** *Cont.*

| | |
|---|---|
| "Creation of conditions for the promotion of educational and school success of children and young people (...) through the diversification of training offers, namely the use of alternative curricula". | Order 147-B/ME/96 [43] |
| "the government has included guidelines in its program for the implementation of an education policy that, (...), allows the management of the curriculum in a flexible and contextualized manner, recognizing that the effective exercise of autonomy in education is only fully guaranteed if the object of this autonomy is the curriculum". | Order 5908/2017 [67] |
| "The lines of action for inclusion link the whole school to a process of cultural, organizational and operational change based on a multi-level intervention model that recognizes and assumes transformations in curriculum management". | DL 54/2018 [47] |
| "The full appropriation of curricular autonomy (...) always materializes in the possibility of flexible management of the basic curricular matrices, adapting them to the curricular options of each school". | DL 55/2018 [48] |
| **Leadership: Excerpts regarding the impact and/or influence of internal leadership (top and middle) on the development of inclusive education policies.** | |
| "Headteachers have a special responsibility for promoting positive attitudes throughout the educational community and for effective collaboration between regular teachers and support staff". | Salamanca Declaration [49] |
| "The coordinator is responsible in general for: (...) "Promoting and encouraging the participation of parents and carers, local interests and the local authority in educational activities". | DL 115-A/98 [44] |
| "It was therefore necessary to create the conditions for good leadership and effective leadership, so that in each school there is a face, a first person in charge, endowed with the necessary authority to develop the school's educational project and implement educational policy measures locally". | DL 75/2008 [45] |
| "(...) it is essential to stimulate the functioning of the intermediate pedagogical management bodies, with an appropriate size, and to promote their involvement in the main decisions of the life of the schools and groups". | Recommendation from CNE [63] |
| "Multidisciplinary team to support inclusive education. It shall (...): a) Raise awareness of inclusive education among the educational community; c) Follow up and monitor the implementation of learning support measures; d) Provide advice to teachers on the implementation of inclusive pedagogical practices". | DL 54/2018 [47] |
| "It is considered necessary: (...) the existence of a leadership oriented by the principles of inclusive education". | Guide from DGE [68] |
| **Resources and Support Measures: Excerpts referring to the need for resources and support measures (teachers, specialized professionals, therapists, teaching materials, teaching time, and school organization) for all students to have meaningful curricular experiences and to reach their full potential.** | |
| "A substantial long-term increase in resources for basic education will be needed". | Jomtien Declaration [19] |
| "Political commitment is needed (...) to obtain the additional resources and to reorient existing ones". | Salamanca Declaration [49] |
| "Children with disabilities may require access to specialist health and education professionals such as occupational therapists, physiotherapists, speech therapists, and educational psychologists to support their learning". | Report from WHO & WB [51] |
| "(...) more teachers and psychologists in schools with appropriate training (...) and more autonomy for schools to organize the resources to be made available". | Recommendation from CNE [63] |
| "Building and improving appropriate school infrastructure (...) that provides safe, non-violent, inclusive and effective learning environments for all". | ODS from UN [69] |
| "national, regional and global efforts will need to be mobilized to: (...) mobilizing resources for adequate financing of education". | Incheon Declaration [57] |
| "more support needs to be given to teachers, education workers and other educational staff to enable them to succeed in training systems that enable flexible learning pathways". | Recommendation from CEU [70] |
| [TEIP schools] "will benefit from special conditions for the development of their projects (...)": "placement of one or more teachers of specific areas" (...) "possibility of using the support of animators/mediators". | Order 147-B/ME/96 [43] |
| "The measures (...) are operationalized with the material and human resources available in the school (...) When the operationalization of the measures (...) implies the need to mobilize additional resources, the school principal must request, with reasons, such resources from the competent service of the Ministry of Education". | DL 54/2018 [47] |

The subtheme concerning the transfer of decision-making powers and responsibilities from centralized spheres to schools promotes more inclusive education in the sense that it allows for more immediate adaptation to the needs of contexts and is supported in several international documents. UNESCO [49] proposes establishing decentralized mechanisms for planning, supervision and assessment of children and adults with special educational needs. The CEC [56] positively highlights the efforts undertaken by several Member States, notably Portugal, to improve the efficiency of education systems through decentralization by granting greater autonomy to schools in defining content, allocating budgets and making decisions related to human resource management. In 2014, the OECD [61] emphasized the importance of further expanding school autonomy. The listed national texts also highlight that decentralization processes are key to adapting to local realities. For example, in the Basic Law (1986), it is pointed out that schools need greater autonomy to make decisions that are aligned with the specific needs of the community in which they are inserted. This change in educational administration is affirmed by DL 43/89, which provides greater autonomy to determine curriculum content, allocate financial resources and make decisions regarding teaching and administrative staff. The reorganization of educational structures mentioned in Order 147-B/ME/96 and DL 115-A/98 requires a reconceptualization of the school in the sense of open organization of communities, recognizing them as territorial units essential in the democratization of education. The conclusion of autonomy contracts between schools and the Ministry of Education, as recommended by the CNE [63], extends the responsibility of schools for educational processes and results, which indicates that schools will take on a greater role in defining educational goals and strategies, adapting them to their specific realities. DL 54/2018 also contributes to the idea of decentralization by encouraging schools to develop partnerships with each other, with municipalities and with other institutions in the community, aiming to enhance local resources and promote the coordination of educational responses.

The statements also reveal a clear consensus on the condition of *curricular flexibility and management* for the production of more inclusive education systems. According to Cosme [3], the possibility of adapting and diversifying curricula allows schools to develop locally relevant content and projects, addressing the specific needs of learners and contexts. This perspective is widely supported in international texts [47,49,64–66] that highlight the need to offer flexible learning pathways and recognize acquired competences, i.e., validate and certify learning, extending Young's [4] powerful knowledge. National legal statutes, such as Order 5908/2017 and DL 55/2018, announce a contextualized adaptation of the curriculum, recognizing that full autonomy is only guaranteed when the object of that autonomy is the curriculum. In short, the idea of curricular flexibility is identified as a central axis for school autonomy, allowing schools to adapt to the needs of students and contexts and enabling a more inclusive education.

Strengthening internal leadership (top and middle) also stands out as a subtheme of *promoting school autonomy*. UNESCO [4] emphasizes the role of school principals in promoting participation, collaboration and positive attitudes throughout the educational community. According to the literature [71–74], there is a correlation between leadership and inclusion, with leadership exerting a close influence on the way in which the participation of educational communities develops. This is intended to exemplify how a subtheme (in this case, leadership) collaborates to consolidate several themes (in this case, in addition to autonomy, participation). In the national context, since 2008 (DL 75/2008), the Ministry of Education has concentrated the management of schools in a unipersonal body—the principal—with the justification that the measure aims to improve the effectiveness of the implementation of educational policy measures and that it is therefore necessary to strengthen leadership. Nevertheless, the same legal diploma reinforces the participation of members of the local community and families in school management bodies. In 2012, the CNE [63] recommended greater power for middle management in school decision making—a perspective that seems to be corroborated by DL 54/2018 with the creation of multidisciplinary support teams for inclusive education (DL 54/2018), although the

appointment of their members falls to the principal. The DGE [68] recognizes that the success of inclusive education policies depends precisely on leadership guided by the principles of inclusive education. In this context, it is important to understand how the internal leadership, especially the principal (one-person body), conceptualizes inclusive education and whether the practices they describe as inclusive are actually inclusive, i.e., whether they aim to promote equal learning opportunities for all students.

Access to resources and support measures is also a key aspect of *promoting school autonomy*. Schuelka et al. [75] state that one of the biggest obstacles to inclusive education is precisely the lack of resources: both inadequate school facilities and a lack of specialized school professionals. UNESCO stresses the need for a substantial increase in resources [19], as well as greater autonomy for schools in organizing available resources [49] in order to better meet the individual needs of learners. The WHO and WB [51] point to the need for specialized professionals in schools, such as therapists and psychologists; this is corroborated by the UN [69], which also draws attention to the need to improve school infrastructure. The CEU [70] warns that for flexible learning pathways to be successful, more support needs to be provided to all professionals working in schools. At the national level, the need for increased resources has also been recognized [43,63]. Nevertheless, DL 54/2018 provides guidelines so that measures to support learning and inclusion are operationalized with the resources available in the school according to a cost-effective logic. Although this legal text admits the allocation of additional resources—exceptionally for students whose curriculum is developed with significant curricular adaptations—this is required to be requested and substantiated by the principal to the competent service of the Ministry of Education, which, according to our interpretation, is an indicator of a centralized educational system.

Emerging from our analysis of the relationship between these two themes—*struggle for equity* and *promotion of school autonomy*—is the paradox of meanings with respect to standardized assessment processes defined at the macro level, i.e., an executive idea, and the flexibility of the curriculum according to the singularities of the students according to a more humanistic and democratic logic. This is in line with what Ball [12] (p. 122) defines as the "tension that runs through all varieties and analyses of policy, between, on the one hand, the need to attend to the local particularities of the policy-making and implementation process and, on the other, the need to take account of general patterns and apparent convergences between localities or what they have in common". Thus, we consider that external evaluation processes, with the aim of promoting equity, may end up contributing to the standardization of educational processes and to the legitimization of a single route to achieve powerful knowledge [4] and thus "(...) lead to schools looking more and more like each other rather than becoming more diversified" [76] (p. 259).

This paper underlines how policy documents are shaping the legal and normative framework of inclusive education policies and convenes the Portuguese case to illustrate the tension between equity and autonomy. The research findings address two important issues in inclusive education and provide a sense of context for their interpretation. Focusing on the Portuguese context, external evaluation carried out through final cycle tests (ninth grade) and national exams (in scientific–humanistic secondary education courses), which are the same for all students, with no adaptation of curricular content, expresses a centralized educational system and can therefore be evaluated by parameters determined at the national level. With the exception of school situations where the curriculum is developed through the educational measure of significant curricular adaptations [47] (Article 10, point b), external assessment to complete these levels of education is mandatory for all students, regardless of the flexibilization of the curriculum that may have occurred throughout their school career under the universal [47] (Article 8), selective [47] (Article 9) and additional [47] (Article 10, except for point b) measures.

Therefore, the universality of external assessment seems to contradict the idea that "the main curricular and pedagogical decisions" can be "taken by schools and teachers", as DL 55/2018 advocates [48] (Preamble). Teachers are understood as curriculum decision makers,

and schools are understood to be responsible for adapting the prescribed curriculum to the real situations they face [77]. Nevertheless, in the same legal text, "curricular autonomy and flexibility" is defined as the "faculty conferred on the school to manage the curriculum of basic and secondary education, grounded on the basic curricular matrices, based on the possibility of enriching the curriculum with the knowledge, skills and attitudes that contribute to achieving the competences provided for in the Profile of Students Leaving Compulsory Education" [48] (Article 3, paragraph c). However, this idea of "managing the curriculum" based on "basic curricular matrices" to "achieve the competences provided" at the national level-in the Profile of Students Leaving Compulsory Schooling, defined as a "benchmark for decisions to be adopted by educational decision-makers and actors at the level of education and teaching establishments and the bodies responsible for educational policies" [78]-is far from the idea of deciding on the curriculum that we mentioned earlier. In this vein, in Lima's [79] analysis of the policy of autonomy and curricular flexibility embodied in DL 55/2018, he argues that the curriculum can indeed be locally managed and "enriched" but continues to be "heteronomously decided" [79] (p. 183).

## 4. Conclusions

The thematic analysis revealed the presence of a number of influential international organizations in the formulation of inclusive education policies in Portugal. The UN, UNESCO, the WB, the OECD, the WHO and the EU, through conventions, declarations, recommendations, reports and studies, provide guidelines that are identified in national legislation and recommendations, and there is coordination between the international and national levels of inclusive education policymaking. The ideas that underpin each theme influence the development of other themes. For example, the idea of promoting equal opportunities, which is part of the theme of *struggle for equity*, is closely linked to the idea of decentralization of decision-making power and the ability of schools to adapt their practices to the needs of students and contexts, while the idea of curriculum flexibility, which is part of school autonomy policies, promotes equity by creating conditions for schools to offer adapted and relevant learning pathways for all students.

We also identified weaknesses in the relationship between these ideas that may pose challenges for the democratization of education. For example, the *struggle for equity*, when underpinned by a logic of economic rationality and standardization, may lead to an overemphasis on comparison and measurement of educational outcomes, disregarding the specificities and diversities of learners and contexts. Therefore, it is desirable for research to analyze the theme of recognition of diversity and to reflect on the challenges and opportunities that derive from combining it with the themes of the *struggle for equity* and *promoting school autonomy*.

However, we note some limitations of the research: the thematic analysis presented here was limited to the texts indicated on the DGE website as guiding inclusive education policies, so it would be desirable to expand the scope of the research with other texts named by schools; in addition, the documentary corpus consists of texts published until 2018, suggesting the need for analysis of texts published later. Thus, we recommend that future research update and complement the results presented here, considering that the context of the influence of educational policies is constantly changing.

The *promotion of school autonomy* may face limitations because it is dependent on both the resources of the territory in which the school is located and the involvement of other local institutions in the development of inclusive education. This means that policies are not finalized at the moment of publication of the legislative text [25] but continue to be elaborated in the context of practice. According to this view, the concepts of given autonomy and *effective* autonomy are especially important because equity relies on how autonomy is enacted by policymakers, teachers, school leadership, students and the educational community.

This justifies the study of what schools understand as "inclusive education", how they interpret the texts influencing these policies and how they translate them, agreeing that the enactment of policies depends on "the context of application and its actors" [80] (p. 16), i.e.,

the context of the practices of the policy cycle. In this vein, Shiroma, Campos and Garcia [81] (p. 431) state that "policy texts give rise to interpretations and reinterpretations, generating, as a consequence, attributions of different meanings and senses in the same term", that is, the interpretation of the texts defines the practices and therefore also produces the policy, making local actors authors of the policy. Accordingly, it is worth asking how institutional actors (principals and teachers) translate the guidelines of policy texts into more inclusive educational responses for all students.

Therefore, we consider that the main contribution of this article is the comprehensive analysis of the ideas that underpin the themes of the *struggle for equity* and the *promotion of school autonomy* at the international and national levels. Analysis of the Portuguese case revealed that the legal and normative framework shaped by international documents underlines a tension between equity and granted and/or *effective* autonomy, raising questions regarding the practices enacted by national and institutional actors; for instance: the orientation for major curriculum decisions to be made by schools and teachers (DL 55/2018) while the education system continues to co-operate towards a curriculum that is centrally decided and assessed; the guidelines to prioritize the use of the same resources for all students can lead to efficiency, posing the challenge of finding a balance between cost-effectiveness and the mobilization of adequate resources; and external monitoring and evaluation mechanisms enacted by following a standardized approach, which can disregard specificities of the contexts that influence educational experiences and outcomes and, as a result, perpetuate disparities in terms of school success. At the same time, the orientation towards making the core curriculum more flexible through measures to support learning and inclusion is an opportunity to design more inclusive school pathways (than before), and this contributes to recognizing the importance of local autonomy in achieving more inclusive education. The creation of multidisciplinary teams to support inclusive education allows schools to take a plural approach of perspectives and knowledge in planning and implementing the most appropriate practices for each school situation, which seems to be an opportunity to affirm the importance of middle-management leadership in developing more inclusive education. The guidelines for establishing partnerships with local institutions and actors can lead to the coordination of educational responses that help to respond to school situations for which the education system does not yet provide the most appropriate responses, contributing to social cohesion. However, as we have already mentioned, this dependence on the resources of the territory and relations with the territory can also represent a limitation. By pointing out the challenges and opportunities that emerge from the articulation of these themes, this paper informs the process of decision making by teachers, educators, researchers and other actors who collaborate in the development of inclusive education policies.

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