

## From the School Inspection Report to Inclusive Impacts: Challenges and Leadership Perspectives in Portugal

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### Abstract

In Portugal, within the context of New Public Management, schools' autonomy has been strengthened and greater responsibility has been placed on school leaders to implement inclusive responses tailored to student diversity. Since 2018, the third cycle of the External Evaluation of Schools Programme (PAEE), led by the Inspectorate-General of Education and Science (IGEC), has been under way, emphasising equitable and inclusive practices aligned with the 2030 Agenda's Sustainable Development Goals. This study examines how the headteacher and the coordinator of the Multidisciplinary Team for Inclusive Education operationalise the principles of inclusive education in a school cluster in Portugal, in the light of the PAEE Reference Framework and the strengths and areas for improvement identified by IGEC. A qualitative case study design is adopted, combining document analysis (the IGEC report and the cluster's core documents) and interviews with both leaders. Thematic analysis, supported by MAXQDA, is structured around three dimensions: (i) planning and internal policies; (ii) pedagogical and support practices; and (iii) monitoring and continuous improvement. The findings indicate challenges associated with a significant increase in student numbers, with impacts on class overcrowding, specialised support and curriculum organisation. IGEC's evaluation fosters self-reflection and incremental change; however, gaps persist in internal mechanisms for follow-up and impact assessment. It is recommended that human resources and school infrastructure be strengthened, and that formal mechanisms for monitoring action plans be institutionalised to ensure the impact and sustainability of inclusive policies and practices.

*Keywords:* school inspection, inclusive education, school leadership, school autonomy, Portugal

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## Introduction

In Portugal, reforms inspired by New Public Management have consolidated an “Evaluative-State” which, alongside the strengthening of schools’ autonomy, intensifies mechanisms of responsabilisation and accountability – including the external evaluation of schools – thereby reconfiguring the role and practice of school leadership (Afonso, 2013; Rosa, 2018). This orientation is embodied in the External Evaluation of Schools Programme (PAEE), conducted by the Inspectorate-General of Education and Science (IGEC), currently in its third evaluation cycle, launched in 2018. Its Reference Framework, updated in 2023, is organised into four domains – Self-evaluation, Leadership and management, Provision of educational services, and Results – and serves as a guide for internal action and continuous improvement, including the promotion of inclusive practices (IGEC, 2023; Silva et al., 2025).

In line with this, the policy and regulatory framework has progressively reinforced the centrality of inclusive education. Decree-Law No. 54/2018 of 6 July sets out that schools should recognise diversity as an asset, “adapting teaching processes to the characteristics and individual circumstances of each student and mobilising the resources at their disposal so that all learn and participate in the life of the educational community” (Portugal, 2018a, p. 2918). The statute structures the measures to support learning and inclusion – promoting equity and equal opportunities in access to the curriculum – at three levels: universal, selective and additional, and requires that their mobilisation be grounded in evidence from monitoring and evaluation. It also establishes the Multidisciplinary Team for Inclusive Education (EMAEI), which is responsible, among other functions, for raising awareness of inclusion within the educational community; proposing measures; overseeing and monitoring their implementation; and providing pedagogical advice, ensuring the preparation of pedagogical documentation and liaison with internal and community resources (Portugal, 2018a). In addition, Decree-Law No. 55/2018 of 6 July defines the curriculum for basic and secondary education and sets out Curricular Autonomy and Flexibility (AFC) as an entitlement granted to schools to manage the curriculum on the basis of the core curriculum matrices (Portugal, 2018b). Operationally, this autonomy is realised, among other aspects, through curricular integration and articulation guided by the Students’ Profile at the End of Compulsory Schooling (Portugal, 2017).

In this context, leadership plays a decisive role in translating formal autonomy into effective practices in the service of inclusion. Simões (2022) finds that, in Portuguese schools, the headteacher’s transformational leadership – grounded in inspirational motivation, goal clarification and support for collaborative work – predicts the quality of the implementation of curricular autonomy and is associated with practices such as forming teaching teams, developing Domains of Curricular Autonomy (DAC), promoting formative assessment, mobilising partners and engaging students and families. This centrality of leadership aligns with the policy and regulatory regime that grants schools scope to manage the curriculum with reference to the Students’ Profile at the End of Compulsory Schooling, calling on schools and teachers, endowed with pedagogical autonomy, to recontextualise the curriculum locally – a dual arrangement that combines a national common core with context-specific decisions at the school and class levels (Silva & Fraga, 2021). Thus, pedagogical leadership capable of steering curricular choices, managing time and resources, and sustaining collaborative processes constitutes an organisational condition for autonomy to become effective and genuinely promote inclusion.

Nevertheless, knowledge gaps remain regarding how leadership – particularly the headteacher and the coordinator of the Multidisciplinary Team for Inclusive Education (EMAEI) – aligns PAEE guidance with the provisions of the inclusive education framework, turning areas for improvement into decisions, monitoring arrangements and observable effects at the level of the school cluster. This study helps clarify that process by focusing on the headteacher–EMAEI coordinator dyad within a single school cluster and by triangulating leadership perceptions with documentary evidence, in a context of increasing sociolinguistic diversity and resource pressure.

A case study centred on a school cluster in Portugal was adopted, combining analysis of IGEC’s external evaluation report and the cluster’s core documents, and interviews with the headteacher and the coordinator of the Multidisciplinary Team for Inclusive Education (EMAEI). This design enables an understanding, in a real-world context, of how policy orientations and PAEE guidance are translated into decisions, practices and inclusive outcomes.

The research question guiding the study was: “How are the principles of inclusive education implemented in a school cluster in Portugal, and what contribution does the PAEE make, in the light of the headteacher’s and EMAEI coordinator’s perceptions and the documentary evidence?” Accordingly, three objectives (O) were defined: O1 – To map and analyse the areas for improvement identified by IGEC and their incorporation into the cluster’s strategic planning, as reflected in its main guiding documents; O2 – To characterise and interpret the pedagogical practices and organisational arrangements that operationalise inclusion, drawing on the perceptions of the headteacher and the EMAEI coordinator; O3 – To assess the extent to which the PAEE drives effective and sustained changes in the organisation and its practices, identifying mechanisms for monitoring and continuous improvement and how they are used.

## Methods

This research is grounded in the interpretivist paradigm and employs a qualitative single case study design (Strumińska-Kutra & Kołodkiewicz, 2018; Yin, 2018). This design is appropriate for addressing “how” and “why” questions, capturing organisational processes and dynamics, and producing a description integrated with analysis, thereby ensuring coherence among objectives, data sources, and procedures (Strumińska-Kutra & Kołodkiewicz, 2018; Yin, 2018). The choice of a case study is justified by three complementary reasons: (i) analytical relevance – the school cluster has, in recent years, undergone a demographic shift (a considerable increase in students of foreign nationality), requiring curriculum reorganisation and appropriate inclusive responses; (ii) availability of sources – access to IGEC’s external evaluation report and the cluster’s core documents; and (iii) access to leadership – the possibility of interviewing those responsible for decision-making and for overseeing inclusive responses.

Priority is given to triangulating sources (the IGEC report, the school cluster’s core documents, and interviews), with a view to interpretative robustness (Flick, 2018). The aim is not to generalise the findings but to formulate inferences applicable to contexts with similar characteristics (Patton, 2015; Yin, 2018). This design is therefore appropriate for understanding how school leadership translates the areas for improvement identified by IGEC into decisions, practices, and monitoring arrangements and mechanisms in the service of inclusion.

In this study, fieldwork was conducted during the 2024/2025 school year. The IGEC report (2019/2020) served as the basis for analysing the areas for improvement identified at the time and for cross-checking them against subsequent implementation choices and constraints, enabling observation of changes, continuities, and challenges in the school cluster's improvement cycle.

### **Contextualisation of the School Cluster**

The study was conducted in a school cluster located in a town in mainland Portugal. In the Portuguese education system, a school cluster is an organisational unit with its own governance and management bodies, comprising several schools under a single leadership and using common instruments for planning, monitoring and self-evaluation (Article 6 of Decree-Law No. 75/2008 of 22 April) (Portugal, 2008). The organisation under study is a public, vertically integrated cluster whose educational provision ranges from pre-school to the 12th grade of secondary education, encompassing 18 establishments (pre-school settings, basic schools for the 1<sup>st</sup>, 2<sup>nd</sup>, and 3<sup>rd</sup> cycles, and a secondary school).

In the 2024/2025 school year, according to information provided by the headteacher, around 2,500 students attended the school cluster, of whom approximately 600 were of foreign nationality (representing about 30 nationalities). School social support measures (meals, transport, and school supplies) and measures to support learning and inclusion (under Decree-Law No. 54/2018) were in place; however, based on the sources consulted, it was not possible to ascertain the percentage of students covered. The teaching staff comprised about 240 teachers. The cluster also had specialist professionals (notably therapists), linguistic and cultural mentors, and psychologists. Non-teaching staff (administrative and operational assistants) were allocated across the cluster's 18 schools, resulting in a shortfall in human resources relative to identified needs.

The pedagogical structures mentioned in the organisational documents were in operation, namely the Learning Support Centre (CAA), the school libraries, and the resource centres. Organisationally, the school year was structured into two semesters. From an infrastructural standpoint, the headteacher noted the need to refurbish the main school and other buildings in the cluster, as there is insufficient space for the exponentially growing student population.

### **Participants**

Two leaders from the school cluster took part in the study – the headteacher and the EMAEI coordinator – who were selected through purposive, criterion-based sampling (Patton, 2015). The criteria were: (i) the strategic vision held by both leaders regarding inclusive policies and practices; (ii) direct involvement in interpreting, planning and operationalising the areas for improvement identified by IGEC; and (iii) voluntary participation with written informed consent.

Regarding the participants' profiles, the headteacher is a Physical Education teacher (third cycle and secondary education) with 20–25 years' service. In addition to a bachelor's degree, he holds a postgraduate qualification in School Organisation and Administration and has previous experience as deputy chair of the management board. The EMAEI coordinator is a Special Education teacher with approximately 30 years' service; she also serves as an adviser to the leadership and is a member of the Quality Observatory (the cluster's self-evaluation

unit). Both hold permanent appointments in the cluster and invest in continuing professional development aligned with their roles.

To ensure anonymity, the participants will hereafter be referred to as P1 (headteacher) and P2 (EMAEI coordinator).

### **Data Sources and Collection Procedures**

The study drew on the following sources: (i) IGEC's external evaluation report (2019/2020), used as a reference point for identifying the school cluster's strengths and areas for improvement; (ii) interviews with the leaders responsible for leading the implementation of inclusive policies (P1 and P2); and (iii) the school cluster's core documents.

With regard to the school cluster's core documents, the documentary corpus comprised: the Educational Project (defining the mission, vision, values, strategic choices and institutional targets); the Headteacher's Intervention Plan (setting out and operationalising the strategic pillars, action plans and evaluation mechanisms, aligned with the PAEE); the Internal Regulations (establishing the organisational and operational framework for the technical and pedagogical services and student support); the Strategic Action Plan (setting out inclusion measures and curriculum flexibility across educational stages); the Learning Recovery Plan (prioritising areas such as reading and writing, curriculum autonomy, and inclusion/wellbeing); the Self-evaluation Report (systematically collating results and indicators, identifying strengths, areas for improvement, and priority pathways for improvement); and the Inclusive Education Procedures Manual (clarifying the mobilisation and monitoring of universal, selective and additional measures, and EMAEI's internal instruments). The documents were obtained from the school cluster's website, and the headteacher provided those that were not publicly available.

The interviews followed a common thematic interview guide, previously validated by a specialist – a professor of social sciences – and by two teachers from other school clusters who perform roles similar to those of the participants. The interviews were conducted in person between December 2024 and March 2025, scheduled to suit participants' availability. Participation was voluntary, with written informed consent (including permission for audio recording), and both participants and the organisation were anonymised. The interviews were audio-recorded, fully transcribed, and the transcripts were returned to the interviewees for verification.

### **Data Analysis – Procedures**

Thematic data analysis (Braun & Clarke, 2022) was supported by MAXQDA, which combined a deductive–inductive framework. At the deductive level, coding was guided by three analytical dimensions aligned with the specific objectives set out in the Introduction: D1 – Planning and internal policies (O1); D2 – Pedagogical practices and support arrangements (O2); D3 – Monitoring and continuous improvement (O3). In parallel, at the inductive level, an open stance was maintained to identify data-driven codes that were not predefined, such as distributed leadership and role clarification, pedagogical differentiation, support measures and multi-tiered interventions, co-teaching, and improvement plans.

The analytical procedure comprised: i) full, repeated reading of all sources; ii) initial coding of relevant excerpts (interviews, IGEC's external evaluation report and the school cluster's

core documents); iii) review, consolidation and aggregation of codes into themes; iv) triangulation of leadership perceptions (interviews) with documentary evidence (the IGEC report and core documents); and v) development of matrices covering the dimensions (D1–D3) to cross-check the areas for improvement identified by IGEC against the actions reported, implemented and being monitored in 2024/2025.

### **Ethical Considerations**

The ethical principles governing research with human participants were safeguarded: interviewees participated voluntarily and their participation was formalised through written, informed consent (Shamoo & Khin-Maung-Gyi, 2021).

In accordance with the General Data Protection Regulation (GDPR) – Regulation (EU) 2016/679 (European Union, 2016) – confidentiality was ensured, the right to withdraw at any time without consequences was upheld, participants and the institution were anonymised, and the recordings and their transcripts were securely stored, with access restricted to the research team and use exclusively for research purposes. The recordings were permanently deleted after transcription and validation.

The protocol for this study received a favourable opinion from the Ethics Committee of the authors' affiliated institution (Opinion No. 64-CED/2024, 6 November 2024), and authorisation from the Ministry of Education was obtained on 13 November 2024 via the School-based Survey Monitoring (MIME) platform.

### **Results and Discussion**

In this section, the analytical structure described earlier is revisited, organised into three dimensions: D1) Planning and internal policies; D2) Pedagogical practices and support arrangements; and D3) Monitoring and continuous improvement. The analysis is grounded in the triangulation of evidence from IGEC's external evaluation report, interviews with the two leaders (P1 and P2), and the school cluster's core documents (Educational Project, Strategic Action Plan, Headteacher's Intervention Plan, Self-evaluation Report, Inclusive Education Procedures Manual, and Internal Regulations).

The analysis is organised into two stages: i) a synthesis of IGEC's report and its alignment with the PAEE Reference Framework; and ii) a comparison of the findings with leadership perceptions and the documentary evidence, highlighting convergences, tensions and implications for inclusion.

### **Summary of the IGEC Report**

The school cluster's external evaluation took place in 2019/2020, and the IGEC report records ratings of "Very Good" for the domains Leadership and management and Provision of educational services, and "Good" for Self-evaluation and Results. The main strengths highlighted include: i) leadership capable of mobilising resources and partnerships, engaging teachers in innovative projects; ii) a diverse educational offer and participation in initiatives that consolidate curricular autonomy and flexibility, promoting collaborative work; and iii) the effectiveness of measures to promote equity and inclusion, evidenced in the results of students benefiting from measures to support learning and inclusion, and in trends in completion rates in vocational education. The school environment is described as safe,

welcoming and inclusive. However, at the upper secondary level, performance among students of foreign nationality is below the desired level.

IGEC identifies the following areas for improvement: i) to focus the school cluster's self-evaluation and align it with the Strategic Action Plan, identifying key areas of organisational development; ii) to broaden the participation of students, parents/guardians and non-teaching staff, strengthening internal and external communication; iii) to deepen the use of formative assessment and institute shared lesson observation (collaborative supervision); iv) to strengthen collaboration between mainstream and special education teachers; and v) to raise learning outcomes (particularly in the third cycle and upper secondary), reduce disparities in the 1st cycle, and strengthen the prevention of classroom disruption, especially in the third cycle, by optimising preventive measures.

Convergence is observed with the PAEE Reference Framework (IGEC, 2023), particularly in the sections relating to inclusive education and across the three dimensions: i) a focus on self-evaluation and its alignment with the Strategic Action Plan, with impact on inclusion (D1); ii) an emphasis on curricular autonomy and flexibility, collaborative work, assessment for learning (formative assessment) and shared lesson observation, consistent with the descriptors of inclusive curriculum management, pedagogical supervision and differentiation strategies (D2); and iii) evidence of results (improvements in completion rates and progress among students covered by support measures) and targets aimed at raising attainment and reducing disparities, both of which align with the descriptors for outcomes relating to equity, inclusion and excellence (D3).

### **Planning and Internal Policies (D1)**

The Educational Project adopts inclusion as a central organising principle and defines four areas of intervention – inclusion, educational success, citizenship and development, and self-evaluation and improvement – with the Strategic Action Plan aligned to each area. IGEC confirms this framework, noting the existence of concrete measures in the operational plans (the Strategic Action Plan and the Annual Plan of Activities).

The Strategic Action Plan carries forward the priorities of the Educational Project, setting out measures and targets by area and cycle. In addition, the Learning Recovery Plan reinforces core domains (literacies, curricular autonomy, inclusion and wellbeing), serving as an instrument for prioritisation and annual reprogramming.

The Headteacher's Intervention Plan draws on IGEC's external evaluation and the school cluster's self-evaluation reports to guide action, identifying problems to be overcome and lines of intervention to address them. The Internal Regulations set out the organisational architecture and the roles of the structures linked to inclusion (EMAEI, the School Psychology and Guidance Service, and the Special Education Department), the coordination between services, and the possibility of entering into co-operation agreements (protocols) with external entities, thereby formalising responsibilities and relationships within the internal policy framework.

In the self-evaluation domain, IGEC notes that the Quality Observatory produces lengthy self-evaluation reports and that the self-evaluation team consists exclusively of teachers. This weakness is acknowledged in the Headteacher's Intervention Plan, which provides for

expanding the team to include other members of the school community (parents, students and non-teaching staff) and for strengthening internal and external communication.

In the interviews, P1 and P2 describe planning mechanisms such as regular meetings and consultation with departments, subject areas and class councils to adjust the Strategic Action Plan. From a strategic management perspective, P1 emphasises the need to align the Educational Project cycle with the headteacher's term of office; an external consultancy was engaged to support the document review and to strengthen coherence between the Educational Project, the Strategic Action Plan and the self-evaluation reports. In parallel, P1 and P2 point to structural challenges affecting planning (chiefly the growth in the number of immigrant students and poor infrastructural conditions), which require ongoing reprioritisation and resource reallocation.

### **Pedagogical Practices and Support Arrangements (D2)**

According to P2, the EMAEI has produced an Inclusive Education Procedures Manual, which sets out the procedures to be followed across the school cluster for students who require measures to support learning and inclusion, as well as how these measures are to be operationalised and how their effectiveness is to be monitored. The document identifies the educational responses available (supports, resources and projects) and the roles responsible for their implementation.

There is also a diversification of provision and inclusive strategies that combine curricular components with activities offered by the Learning Support Centre (CAA). P1 notes the alignment between school sport and inclusive education (creating strands such as boccia, adapted swimming and adapted water sports), as well as the integration of the arts (music and visual/technological education) into the CAA's work, and the establishment of external co-operation agreements (protocols) for therapies aimed at students in the Multiple Disabilities Support Unit. These options are set out in the Manual mentioned above, which stipulates that, for students with additional measures, combined curriculum matrices are used (class-based subjects together with CAA activities), with the involvement of specialist professionals and Special Education teachers or teachers from other subject areas. Concerning the organisation of teaching and in-class support, P2 reports that, for students with selective measures, Portuguese, Mathematics and English teachers were deployed to provide advisory support and co-teaching; for students with additional measures, the cluster optimised timetabled hours of Physical Education, Visual Arts and English teachers within the Learning Support Centre (CAA). The strategic documents also confirm and frame these options. The Strategic Action Plan includes an Action Plan for Inclusion with operational targets – namely co-teaching in Portuguese and Mathematics in all classes with students identified as receiving selective measures – and monitoring indicators. The Learning Recovery Plan prioritises Inclusion and Wellbeing and provides, among other initiatives, the subject Portuguese as a Non-Native Language and the organisation of Year 6 classes by levels of language proficiency, in response to the growth in the number of students arriving from abroad and the associated demand for language support.

### **Monitoring and Continuous Improvement (D3)**

IGEC's external evaluation recognises the existence of systematic self-evaluation procedures, led by the Quality Observatory, with regular reports on school results, national examinations and the impact of initiatives such as the Domains of Curricular Autonomy. However, it notes

that the selection of domains and variables is excessively broad – covering a large and heterogeneous set of areas and indicators, with no clear hierarchy or prioritisation criteria – which dilutes the analytical focus and makes it challenging to identify and monitor areas for improvement in teaching and learning.

In line with these guidelines, the Headteacher's Intervention Plan sets targets to: i) diversify the domains of analysis, including the longitudinal tracking of outcomes; ii) institute collaborative supervision practices; and iii) monitor the quality assurance system within the European Quality Assurance in Vocational Education and Training (EQAVET) framework. It also provides for a biennial evaluation, with a report submitted to the General Council and made publicly available, as well as an evaluation at the end of the four-year term.

In the interviews, P1 reports that the Strategic Action Plan is reviewed annually after consultation with the pedagogical structures, with the self-evaluation team (the Quality Observatory) responsible for drafting it and presenting it to the Pedagogical Council. P2 indicates that the EMAEI mainly monitors the effectiveness of learning support measures (selective and additional), drawing on assessment records and descriptive summaries. The class councils report the number of students covered and the success (or otherwise) of the measures, and these data are submitted to the Quality Observatory. Both participants mention support from an external consultancy to improve monitoring and self-evaluation processes; at the time of the interviews, surveys aimed at different members of the educational community were being prepared.

In sum, the monitoring system shows a degree of procedural maturity but also analytical dispersion. To strengthen continuous improvement, it is crucial to: i) focus monitoring on inclusion-sensitive indicators (tracking subgroups and undertaking longitudinal analysis); ii) close the data–decision–impact loop, systematically integrating EMAEI reports into self-evaluation with defined timelines, responsible persons and interim reviews; iii) institutionalise collaborative supervision, linking it to evaluation and structured feedback to teams; and iv) synchronise planning and accountability, aligning the Educational Project, the Strategic Action Plan and the headteacher's term of office, broadening the team and its representativeness within the Quality Observatory, and ensuring the regular public dissemination of results.

## Conclusion

This study addressed the research question by demonstrating how the principles of inclusive education are implemented and the extent to which the PAEE contributes to this process in the school cluster under study. It found that inclusion is realised when school leadership translates IGEC's evaluation into planning decisions (D1), into pedagogical practices and support arrangements (D2), and into monitoring routines (D3). In operationalising these dimensions, teachers play a decisive role, and the EMAEI assumes a central role: it clarifies procedures, supports the implementation of inclusive practices, and produces systematic evidence on the effectiveness of learning and inclusion support measures.

The PAEE acted as both a regulatory compass and a critical mirror: it triggered self-reflection and incremental improvements; however, its effects are not automatic. It becomes a transformative lever when school leadership translates it into clear pedagogical priorities with explicit targets, appropriate resource allocation, and consistent, outcome-oriented monitoring and follow-up.

This framing is all the more necessary given the considerable increase in the number of students of foreign nationality, with impacts on class overcrowding, curriculum organisation and the management of support provision, requiring structured responses and adequate resourcing.

Future research should focus on articulating leadership decisions, organisational arrangements (notably the EMAEI), and learning outcomes within a longitudinal design, enabling a more precise and robust assessment of differential impacts, particularly for students covered by learning and inclusion support measures.

Ultimately, inclusion becomes effective when the school is able to turn data into commitment, decisions into coherent action, and monitoring into an intrinsic feature of its organisational culture. To enable such dynamics, external evaluation interventions can play a catalytic role, promoting more efficient strategic planning of available organisational resources.

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### **Declaration of Generative AI and AI-Assisted Technologies in the Writing Process**

The authors used Grammarly for linguistic corrections and ChatGPT to review clarity and textual organisation; no AI tools were used to generate data, results, or analyses. The scientific content is original and the sole responsibility of the authors.

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