



Leadership Practices for Inclusion in the Context of External School Evaluation: Findings from a Portuguese Case Study

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Abstract

In Portugal, the external evaluation of schools, conducted by the Inspectorate-General of Education and Science, constitutes a significant instrument for regulation, accountability and organisational improvement within an education system guided by principles of equity and inclusion. In this context, it is important to understand how school leaders make use of this evaluative mechanism to guide processes of institutional reflection, regulate educational action and sustain practices that are better attuned to student diversity. A qualitative case study was conducted in a cluster of schools in mainland Portugal, based on the analysis of the external evaluation report, key institutional documents and interviews with 12 teachers holding leadership roles. Using MAXQDA software, the data were organised and interpreted around four dimensions – strategic, organisational, pedagogical and community – in order to explore the interplay between school leadership, institutional evaluation and inclusion-oriented practices. Ethical procedures applicable to educational research were followed, including informed consent, the anonymisation of participants and the protection of the data collected. The results show that school leaders mobilise external evaluation to promote more inclusive responses through the strategic use of evaluative data, collaborative decision-making, the organisation of support structures, the monitoring of teaching practices and the alignment between school improvement processes and education policies. However, the data also reveal that this appropriation is not linear, being shaped by challenges related to the articulation between self-evaluation and planning, the consolidation of formative assessment and collaborative supervision, limited resources and family engagement. The analysis further shows that the increasing number of students of foreign nationality, together with the linguistic and cultural plurality of the school population, emerges as a particularly significant challenge, requiring contextualised and appropriately tailored responses. It is concluded that external evaluation can foster critical reflection, organisational learning and educational transformation when appropriated by school leaders as an instrument for continuous improvement, shared responsibility and the consolidation of sustainable inclusive practices. Nevertheless, its effects depend on organisational conditions, available resources and the capacity to translate the evidence base produced by evaluation into effective practices.

Keywords: External School Evaluation; School Leadership; Inclusive Education; Linguistic and Cultural Diversity; Portugal.

1. Introduction

Inclusive education has become firmly established on international and, in particular, European policy agendas as a structuring principle of quality, equity and educational justice [1,2]. In a context marked by increasing social, cultural and linguistic diversity among school populations, education systems are called upon to ensure not only access to schooling, but also the effective participation, learning, well-being and success of all students [2,3]. The OECD emphasises that phenomena such as demographic change, migratory movements, refugee crises and rising inequalities have contributed to the growing diversity of school populations, requiring more equitable and inclusive educational responses [3]. This concern is also reflected at the European level, where the integration of migrant and refugee children and young people into education and training systems has been regarded as a policy priority [4,5,6]. In Portugal, this issue is particularly relevant given the marked increase in the number of students of foreign nationality in compulsory education, which covers children and young people aged between 6 and 18, under Law No. 85/2009 [7]. In 2023/2024, 174,126 children and young people of foreign nationality were enrolled in compulsory education in Portugal, 31,366 more than in the previous year, representing 13.6% of students in basic and secondary education, excluding adult learners [8]. Of these, 84.3% attended state schools, indicating that although cultural and linguistic diversity cuts across the education system as a whole, it is particularly relevant in state schooling [8].



Beyond this quantitative increase, the current diversity of Portuguese schools is also reflected in the multiplicity of national and linguistic backgrounds. Recent data from the National Education Council indicate that, in 2023/2024, school clusters and non-clustered schools had, on average, around 18 nationalities, with some contexts having more than 40 nationalities represented [9]. This reality makes educational action more complex and poses new challenges for school organisation, curriculum management, pedagogical work and liaison with families and communities.

Within the national policy and regulatory framework, Decree-Law No. 54/2018 establishes the principles and rules that guarantee inclusion, understood as a process aimed at responding to the diversity of the needs and potential of each and every student, by increasing participation in learning processes and in the life of the educational community [10]. In turn, Decree-Law No. 55/2018 establishes the curriculum for basic and secondary education and the guiding principles for its design, implementation and assessment, seeking to ensure that all students develop the competences set out in the Students' Profile by the End of Compulsory Schooling [11]. Taken together, these legal instruments support a conception of schooling oriented towards inclusion, curriculum flexibility, pedagogical differentiation and the improvement of learning. However, the existence of regulatory guidelines favourable to inclusion does not, in itself, guarantee their enactment in organisational and pedagogical practices.

Linguistic and cultural diversity makes this framework even more complex, particularly when it involves migrant or refugee students, or students whose schooling trajectories have taken place in languages other than Portuguese. Their inclusion requires welcoming practices, sociolinguistic diagnosis, language support, cultural mediation and curriculum management that is sensitive to context. In this domain, the provision of Portuguese as a Non-Native Language (PLNM) constitutes a relevant response to support students whose mother tongue or language of schooling is not Portuguese. The guidelines recently made available by the Directorate-General for Education aim to support the linguistic and curricular inclusion of migrant students with very limited knowledge of Portuguese [12]. In this context, school leaders play a decisive role in the enactment of inclusive policies, insofar as they are responsible for interpreting and translating regulatory guidelines into contextualised organisational, curricular and pedagogical practices [13]. Responding to diversity, therefore, requires strategic vision, resource management, collaborative work, engagement with families, communities, municipalities, and other local partners, as well as the monitoring and evaluation of the measures implemented.

Recent studies on the external evaluation of schools have highlighted its relationship with processes of autonomy, curriculum management and school improvement [14]. However, in the specific field of inclusive education, and particularly within the scope of the External School Evaluation Programme (PAEE), there remains a need to deepen understanding of the actual impact of evaluation on organisational and pedagogical practices [15]. The external evaluation of schools therefore constitutes a relevant process for understanding how school organisations recognise, organise and sustain responses oriented towards inclusion. The reference framework for the third cycle of the PAEE was updated in 2023 and is structured around four domains — Self-Evaluation, Leadership and Management, Provision of Educational Service and Outcomes — allowing for a multidimensional reading of school action [16]. This framework sets out indicators related to the improvement of inclusive education, the functioning of support structures and the orientation of educational action towards the Students' Profile by the End of Compulsory Schooling [16]. However, the ways in which school leaders appropriate this evaluative process to promote contextualised inclusive practices require further examination.

Thus, this article focuses on the external evaluation of schools as a process that can foster institutional reflection and the improvement of responses to diversity, seeking to answer the following research questions: (1) How do school leaders appropriate external evaluation as an instrument for reflection, regulation and improvement? (2) How is this appropriation translated into the organisation of inclusion-oriented responses, considering the emerging challenges associated with students' linguistic and cultural diversity?

2. Methodology

This study adopts a qualitative approach, with an interpretivist orientation, suited to understanding processes, meanings and practices in specific educational contexts [17]. A case study was chosen, centred on a cluster of state schools in mainland Portugal, as it enables an in-depth analysis of a complex educational phenomenon in its real-life context: the way in which school leaders appropriate the external evaluation of schools to guide processes of reflection, regulation and improvement in organisational and educational responses [18]. The school cluster was selected intentionally, considering its participation in the third cycle of the External School Evaluation Programme and the



relevance of the challenges associated with the social, linguistic, and cultural diversity of its school population. The unit of analysis focused on the action of school leaders and on the ways in which they interpret, mobilise and translate external evaluation into decisions and practices oriented towards inclusion.

The empirical corpus comprised two main sources: i) the external evaluation report produced by the Inspectorate-General of Education and Science and key institutional documents from the school cluster, namely the Educational Project, the Internal Regulations, the Director's Intervention Project, the Self-Evaluation Report and strategic planning documents; and ii) semi-structured interviews with 12 teachers holding leadership roles. The participants included the director of the school cluster and 11 coordinators with pedagogical, organisational and/or strategic responsibilities. Participants were selected intentionally, focusing on key actors who, because of the roles they perform within the school cluster, have direct knowledge of leadership processes, the organisation of support measures, the implementation of inclusive practices and institutional responses to student diversity.

The interviews took place between December 2024 and March 2025, at times agreed with the participants. The interview guide was developed in line with the objectives of the study and organised around dimensions related to school leadership, the appropriation of external evaluation, the organisation of inclusive responses, pedagogical practices, engagement with the community and the challenges arising from linguistic and cultural diversity. The interviews were audio-recorded, fully transcribed and incorporated into the analytical corpus. Documentary analysis made it possible to contextualise participants' accounts and triangulate the evidence collected, thereby strengthening the interpretative consistency of the findings [19].

The data were analysed through thematic analysis, supported by MAXQDA software. The analytical process combined deductive and inductive logics: in a first stage, categories guided by the objectives of the study and the theoretical framework were considered, namely the strategic, organisational, pedagogical and community dimensions of inclusion; in a second stage, repeated reading of the transcripts and documents enabled the identification of emerging subcategories related to collaborative decision-making, the mobilisation of evaluation data, support for teaching practices, responses to students' needs, and linguistic and cultural diversity. Coding was conducted iteratively, with successive revision of the categories, comparison across sources and selection of representative excerpts, to ensure the internal coherence of the analysis and the traceability of interpretations [20,21]. The credibility of the study was ensured through source triangulation, peer review within the research team and validation of the findings with participants [22].

The ethical principles applicable to educational research were observed. Participants were informed about the objectives of the study, the voluntary nature of their participation, the possibility of withdrawal and the conditions of confidentiality. All participants signed an informed consent form. The data were anonymised by assigning alphanumeric codes to participants, and the identity of the school cluster was omitted. The processing, storage and analysis of the information complied with the General Data Protection Regulation, ensuring the protection of personal and institutional data [23].

The limitations of the study stem from the nature of the single case, which does not allow for statistical generalisation. However, the analytical depth of the study and the transferability of the interpretations to contexts with similar characteristics constitute relevant contributions to the field [18,22]. It is also important to acknowledge that this research focuses on the perceptions of teachers holding leadership roles and on documentary analysis, without seeking to measure the effects of inclusive practices on students' learning or experiences. Even so, the study makes it possible to understand how school leaders interpret and mobilise external evaluation in the organisation of educational responses that are more closely attuned to diversity.

3. Results and Discussion

Data analysis made it possible to understand how school leaders appropriate external evaluation, mobilising it to sustain processes of reflection, regulation of educational action and improvement of responses to student diversity. Triangulation between the external evaluation report, key institutional documents and interviews reveals a dynamic relationship between institutional evaluation, school leadership and inclusion. This relationship is neither linear nor uniform; it depends on how leaders interpret the data contained in the report, articulate them with self-evaluation and convert them into strategic decisions, pedagogical practices and monitoring processes.

The most recent IGEC report awarded the school cluster under analysis a rating of Good in the domains of Self-Evaluation and Outcomes, and Very Good in the domains of Leadership and Management and Provision of Educational Service. As strengths, the report highlighted consolidated self-evaluation



procedures, leadership dynamics oriented towards the mobilisation of resources and partnerships, effective resource management, the diversity of educational provision, curricular options aligned with the principles of inclusive schooling and the effectiveness of measures promoting equity and inclusion. Simultaneously, the report identified areas for improvement related to the articulation between self-evaluation and strategic planning, internal reflection on academic outcomes, the involvement of students, families and non-teaching staff, internal and external communication, formative assessment, and collaborative supervision.

The analysis of the school cluster's key institutional documents shows that several of these dimensions were incorporated into planning. The Educational Project presents inclusion as a guiding axis of educational action, linking it to academic success, citizenship, students' holistic development, self-evaluation and continuous improvement. The Strategic Action Plan translates this orientation into measures aimed at promoting inclusion, recognising the heterogeneity of students and the need to further operationalise the measures provided for in Decree-Law No. 54/2018. In the same vein, the Director's Intervention Project revisits dimensions identified in the external evaluation and reorganises them as axes of action, distinguishing areas requiring improvement — such as the academic outcomes of certain groups of students, weaknesses in communication processes and the systematisation of formative assessment — from aspects to be strengthened or consolidated, such as the participation of the educational community in the construction of key institutional documents and the development of collaborative supervision practices.

Subsequently, following the characterisation of the participants, the results are presented and discussed according to four analytical dimensions: strategic, organisational, pedagogical and community. This organisation makes it possible to show how external evaluation is appropriated by school leaders across different levels of school action, from strategic planning to the construction of educational responses oriented towards the challenges arising from students' linguistic, cultural and social diversity.

3.1. Characterisation of Participants

The empirical study was conducted in the 2024/2025 school year in a school cluster that offered education from pre-school to the secondary level, attended by around 2,500 students, approximately 25% of whom were of foreign nationality.

The study involved 12 teachers holding leadership roles: the director and 11 coordinators of pedagogical, organisational and inclusion support structures. Each participant was assigned an alphanumeric code from P01 to P12 to ensure confidentiality. The detailed characterisation of the participants is systematised in Table 1.

Table 1. Characterisation of Participants

Code	Leadership role	Length of service	Age group
P01	Coordinator of class tutors in secondary education	31–35	> 61
P02	Coordinator of class tutors in the third cycle of basic education	21–25	41–50
P03	Special education coordinator	36–40	> 61
P04	Coordinator of class tutors in the second cycle of basic education	26–30	41–50
P05	Project coordinator	36–40	> 61
P06	Coordinator of the Multidisciplinary Team for Support to Inclusive Education	26–30	51–60
P07	School sports coordinator and chair of the General Council	26–30	51–60
P08	Coordinator of the first-cycle basic education department	31–35	51–60
P09	School libraries coordinator	41–45	> 61
P10	School cluster director	21–25	41–50
P11	Citizenship and development coordinator	21–25	41–50
P12	Self-evaluation team coordinator	36–40	> 61

Source: Authors' own elaboration

Taken together, the participants represent different levels of decision-making and coordination, encompassing senior leadership, middle leadership, inclusion support structures, self-evaluation, projects, the school library and engagement with the community. This diversity makes it possible to analyse inclusion as an organisational process involving strategic decision-making, internal coordination, pedagogical monitoring and relationships with the surrounding context.

3.2. Strategic Dimension: From External Evaluation to Planning



The strategic dimension reveals that external evaluation constitutes a reference point for the leadership and institutional management of the school cluster, although its impact depends on leaders' capacity to integrate its results into planning, self-evaluation and improvement processes. The IGEC report recognises the existence of self-evaluation and data collection procedures; however, it identifies the need for stronger articulation with strategic planning and internal reflection on the results.

This tension between data collection, reflection and action is clearly present in the internal documents. The Self-Evaluation Report conceives self-evaluation as a continuous process, aimed at assessing the performance of the school cluster and defining more effective forms of action. In this sense, the document assumes the intention to identify strengths and weaknesses, analyse outcomes and establish strategic action plans that promote a culture of continuous improvement.

In the interviews, school leaders revisit this dimension as a process of progressive appropriation. External evaluation offers an external perspective that enables the confirmation of strengths, the identification of weaknesses, and the legitimisation of change. P07, for example, values the IGEC report precisely because it offers an external, objective view that complements the self-evaluation team's perspective. This perspective is linked to the role assigned to that team in the Internal Regulations, whose existence makes it possible to understand external evaluation not merely as a one-off evaluative event, but as a source of information capable of feeding internal mechanisms of reflection, monitoring and decision-making. Similarly, P01 associates external evaluation with a moment of clarification and guidance, particularly in the context of implementing inclusive education policies after 2018. The participant states that the school cluster needed to understand what should be adjusted and that, following the evaluation, support documents and clearer guidelines for teachers were produced. This interpretation shows that external evaluation was appropriated as an instrument of internal regulation, helping to translate regulatory guidelines into concrete procedures.

However, this strategic appropriation of external evaluation does not remain linear over time. The director (P10) acknowledges that the IGEC reference framework was relevant when the report was received, but that it gradually receded into the background amid emerging challenges, such as the COVID-19 pandemic and the marked increase in foreign students. The recent partnership with an external consultancy body to support the evaluation of the Educational Project, mentioned by P07 and P10, suggests a willingness to strengthen internal capacity for organisational analysis, drawing on initial external support as part of an empowerment strategy.

3.3. Organisational Dimension: Formal Structures and Distributed Responsibilities

The organisational dimension shows that the response to diversity is sustained by a network of structures, responsibilities and coordination mechanisms. The IGEC report had already recognised the school leadership as a cohesive, dynamic team, open to dialogue and capable of mobilising resources and partnerships, while also highlighting the existence of middle leadership structures suited to the educational responses required. It further valued the rational and equitable management of resources and the existence of an overall school environment that is safe, welcoming and inclusive.

The key institutional documents confirm this organisation. The Internal Regulations formalise specific resources to support learning and inclusion, including the Psychology and Guidance Service, Special Education teachers, the Multidisciplinary Team for Support to Inclusive Education (EMAEI), the Learning Support Centre, the Reference School for Early Intervention and other forms of support. This organisational architecture shows that inclusion is institutionalised through formal structures, whose implementation depends on the articulation between these structures and teachers' practices.

The interviews make it possible to understand how this organisation is operationalised. The director (P10) emphasises that the enactment of inclusive practices depends on the involvement of middle leaders and teachers, recognising that initiatives designed by the leadership only become effective when they are appropriated by the actors responsible for implementing them.

This idea is central to interpreting leadership as a distributed process. The action of leaders is not limited to defining guidelines; it involves coordination, listening, the mobilisation of resources, the negotiation of solutions and the monitoring of responses. Inclusion is thus presented as a shared organisational responsibility, requiring a chain of mediation between the leadership team, coordinators, class councils, EMAEI, Special Education, teachers, families and external partners. The EMAEI emerges as a decisive structure in this mediation. P06 describes an ongoing process of document review, monitoring of measures to support learning and inclusion, reorganisation of the Learning Support Centre, and mobilisation of teachers from different subject areas to respond to students' specific needs.

The organisational dimension is also evident in the work of the coordinators of class tutors, who act as mediators among class councils, the leadership team and support structures (P01, P02, P04). These



coordinators follow cases, guide procedures and contribute to the early identification of needs. This articulation is particularly important in a large school cluster, where the circulation of information may constitute both a condition for effectiveness and a source of vulnerability.

Despite the existence of these structures, the data reveal persistent limitations. P12 considers that the EMAEI seeks to address needs, but the lack of human resources prevents an effective response. This finding is consistent with the pressure felt by other participants regarding the shortage of psychologists, operational assistants, specialised teachers and available time for monitoring and support. Thus, the organisation of inclusive responses depends on formal structures, but also on material and human conditions that do not always keep pace with the growth of needs.

In this scenario, external evaluation makes organisational strengths and weaknesses visible. The external evaluation report values leadership, resource management and partnerships, but also identifies communication and the involvement of different actors in the school cluster's strategic definition as areas for improvement. The interviews show that investment was made in meetings, internal coordination, monitoring documents and consultation with the community, while also acknowledging that the increasing complexity of the school population requires more rigorous, agile and sustained coordination.

3.4. Pedagogical Dimension: Inclusive Responses, Assessment and Classroom Practices

The pedagogical dimension makes it possible to analyse how strategic and organisational guidelines are translated into teaching, assessment and student monitoring practices. The IGEC report recognised as strengths the diversity of educational provision, participation in projects that consolidate curricular autonomy and flexibility, the articulation of learning, collaborative practices among teachers and curricular options consistent with the primacy of inclusive schooling. However, it identified two areas for improvement that are particularly relevant to the transformation of pedagogical practice: deepening formative assessment and developing systematic procedures for monitoring and regulating teaching practice, including shared observation within a logic of collaborative supervision.

The Strategic Action Plan confirms that inclusion was translated into concrete pedagogical measures. The Action Plan for Inclusion identifies student heterogeneity and different modes of access to learning as a problem, defining as objectives the improvement of student success, the dissemination of available support resources to the community and the empowerment of students for integration into active life. Among its targets, particular emphasis is placed on ensuring co-teaching in Portuguese and Mathematics in classes with students identified as requiring selective measures.

The interviews show that this orientation is implemented through measures, pedagogical differentiation, in-class support, tutoring, the Study Room, Study Support, projects and coordination among teachers. P01 refers to the use of shared grids in class councils to identify difficulties and measures to be applied, enabling more timely intervention. P07 also describes the existence of diversified responses, such as in-class support, tutoring, mentoring and other forms of support, advocating flexible management centred on students' characteristics. Inclusion is thus understood as a monitoring process that adjusts available resources to each student's specific needs, requiring coordination between diagnosis, intervention and monitoring. However, it is in this dimension that tensions become most evident. Although formative assessment is recognised as a priority, it emerges in the interviews as a practice still undergoing consolidation. P11 states that, following the external evaluation, the school cluster deepened its use, but acknowledges difficulties in implementing collaborative supervision due to resistance from some teachers.

This tension is also visible in the Director's Intervention Project, which identifies the lack of systematic use of formative assessment as a feedback instrument for students and the absence of collaborative supervision oriented towards improving teaching practices as problems. The fact that these problems are included in the director's strategic diagnosis confirms that the areas for improvement identified by IGEC were appropriated within strategic planning, even though they remain challenges in terms of implementation.

Thus, the pedagogical dimension reveals a gap between the existence of guidelines and the effective transformation of classroom practices. External evaluation contributed to legitimising priorities such as formative assessment, differentiation, supervision and the regulation of practices, but their implementation depends on time, training, resources, collaboration and continuous professional development. Pedagogical change therefore appears to be slower and more demanding than documentary or structural reorganisation.

3.5. Community Dimension: Linguistic and Cultural Diversity as an Organisational Challenge



The community dimension is particularly prominent in participants' accounts. The IGEC report had already noted that, despite investment in the teaching and learning processes of students of migrant origin, namely through the provision of PLNM and pedagogical support, outcomes remained below the desirable level. The Director's Intervention Project revisits this weakness, identifying the school outcomes of these students as a challenge to be overcome.

In the interviews, the director states that the school cluster welcomes around 600 foreign students, with particularly marked growth over the last three years, characterising diversity and multiculturalism as "the greatest challenge" (P10). P01 corroborates this interpretation, describing the increase as a sudden and intense change, and listing concrete difficulties: the concentration of several foreign students in the same class, the need to adjust curricula, the management of PLNM and the gap between students' prior knowledge and curricular requirements, particularly in years subject to national examinations. The response to this challenge has involved strategic and organisational readjustments. The director refers to the revision of initiatives such as linguistic and cultural mentoring, aimed at supporting newly arrived students, as well as the allocation of mentors by the Ministry of Education, interpreted as a response to the growth in the number of foreign students and to the demands of their academic and sociocultural integration. The school library also emerges as a relevant structure in this process: P09 describes it as a space "of everyone and for everyone", oriented towards welcoming students and promoting intercultural activities.

This dimension shows that linguistic and cultural diversity is not merely a pedagogical challenge, but also an organisational and community issue, involving welcoming practices, communication with families, cultural mediation, language support, curriculum management and articulation with local partners. However, family involvement remains fragile, being recognised by the director (P10) as one of the main challenges, particularly in the more advanced stages of schooling, in line with the area for improvement identified by IGEC concerning the need to strengthen the participation of parents/guardians, students and non-teaching staff in the school cluster's strategic choices.

4. Conclusions

This study made it possible to understand how, in this case, school leaders appropriated the external evaluation of schools to guide institutional reflection, regulate educational action and improve responses to student diversity. In the case analysed, this appropriation was reflected in the definition of priorities, the reorganisation of support structures, the valuing of middle leadership and the monitoring of educational responses. In this process, school leaders mobilise different dimensions of school action – strategic, organisational, pedagogical and community – to sustain responses that are more closely attuned to student diversity. However, these processes are still undergoing consolidation and require stronger articulation between external evaluation and self-evaluation, strategic planning and the monitoring of pedagogical practices.

Inclusion emerges as a collective process, constructed through the articulation between senior leadership, middle leadership, teachers, specialised structures, families and external partners. Linguistic and cultural diversity emerges as a particularly significant and growing challenge, showing that inclusion requires institutional, pedagogical and community conditions capable of sustaining the participation, learning and development of all students.

It is concluded that external evaluation acquires its true meaning when appropriated by school leaders as an instrument of reflection, shared responsibility and situated organisational transformation. Its relevance lies not only in the diagnosis it produces but also in how it is transformed into empowered action. It is through this movement that school leaders can strengthen the school's capacity to respond to diversity with greater proximity, justice and commitment to the educational success of all.

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