External Evaluation of Schools in Portugal and the Global Agenda[1]

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Summary

New modes of global educational governance are affecting contemporary education (Gulson, Lewis, Lingard, Lubienski, Takayama, & Webb, 2017). Educational evaluation is one example of how the global agenda discourses are significant to national contexts, making the global commitments the basis of the *glocal* actors' agency (Ball, 2016).

Theoretical research has extensively and presently debated the transnational impact of policies (Nye & Keohane, 1971). Transnational influences are understood in local, national, and global contexts (Olesen, 2005), through the agenda of organizations and networks that exert influence in the national policies (Ball, 2012). Global relations intensify the dependence on others, exchanging relationships between governments, in a logic of influence (Nye & Keohane, 1971), which in the field of education and the European context has been reflected as an "Education Space" (Nóvoa & Lawn, 2002).

Steiner-Khamsi (2012) identifies the existence of travelling educational reforms as an increasing result of globalization. Sahlberg, Hasak and Rodriguez (2017, p. 2) emphasize that "globalization has. . . led to synchronization of education systems from an international perspective. Similar, if not the same educational issues, are debated and argued from one country to another" as one of the key mechanisms to transform education in times of globalization.

Grounded by this framework we aim to analyse how transnational discourses can be significant to the *glocal* actors (Ball, 2016), creating yardsticks to cater to its global agenda, namely in the case of the school evaluations in Portugal.

External Evaluation of Schools (EES) system in Portugal reflects the globalised education policy, expressing the significance of mobile transnational discourses. The Portuguese system

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endorses schools' evaluation as a formative instrument aiming for the quality of the schools. The results of this evaluation have been published by national and transnational reports from different organizations. In Portugal, the Inspectorate-General of Education and Science (IGEC) published four reports (IGEC, 2013; 2015; 2016; 2018) concerning the EES second cycle (2011-2017). At the transnational level, the OECD has produced reports about evaluation (OECD, 2013; Santiago, Donaldson, Looney, & Nusche, 2012), the Eurydice did an overview of schools' evaluations in Europe (European Commission/EACEA/Eurydice, 2015) and the United Nations Educational, Scientific and Cultural Organization (UNESCO, 2017) also approached quality education issues globally.

Transnational organizations contribute to a global neoliberal policy that emphasises the same imaginaries and reform movements around the world (Sahlberg, Hasak, & Rodriguez, 2017). Consequently, the effects of the education policy of borrowing and lending (Steiner-Khamsi, 2012) create a refraction process (Goodson & Rudd, 2012) of the global discourses to the national context. Likewise, the Portuguese EES system reflects the globalised education policy, expressing how significant mobile transnational discourses are.

This ubiquity of transnational educational perspectives reinforces the importance of the debate, regarding the conditions and consequences of the soft regulation (Jacobsson & Sahlin-Andersson, 2006) in the refraction processes (Goodson & Rudd, 2012).

Keywords

Schools' Evaluation, Schools' Inspection, External Evaluation of Schools, Document Analysis.

Methods

To answer the research question, a mixed-methods approach (Creswell & Clark, 2007) was chosen, using document analysis (Atkinson & Coffey, 2004; Bowen, 2009), combining content analysis and thematic analysis (Bardin, 2004) assisted by the NVivo™ software.

To serve the research purposes, the documental corpus was based on the selection of documents that were available to the public, have relevant data for the research problem analysis, and that were published during the second cycle of EES in Portugal (2011-2017) or that focused on the second cycle, in the case of the national reports.

The documentary material used from transnational reports and national, corresponded to the analysis of four transnational reports published from OECD, Eurydice and UNESCO (European

Commission/EACEA/Eurydice, 2015; OECD, 2013; Santiago, Donaldson, Looney, & Nusche, 2012; UNESCO, 2017) and four EES reports published by IGEC (IGEC, 2013, 2015, 2016, 2018). The content of the documents was codified (Saldaña, 2013) to define the coding units (Bardin, 2004). Coding units were associated by categories (Bardin, 2004) regarding relevance as criteria (Coffey & Atkinson, 1996) resulting in the elimination or renaming of some codes, in a process that Saldaña (2013) calls eclectic coding. This iterative process created a map of critical concepts and themes based on the principles of categorization by Bardin (2004). After categorizing the coding units (Bardin, 2004), quantitative and qualitative data analysis was carried out, to increase the reliability of the results (Creswell & Clark, 2007).

Conclusions

The analysis of the national reports (IGEC, 2012; 2013; 2015; 2018) demonstrates that there is a uniformization of the content of the reports with an emphasis on the EES process methodology. Based on the analysis, reveals the importance of international benchmarking for the schools' inspection, on the IGEC perspective, since there is a particular interest in the comparative analysis with other national contexts. There is a conceptual framework markedly inscribed in the trends of an accountability policy, and evidence of the need to adapt the evaluation to the schools' specificities as a mechanism for the EES improvement. In the national reports, school self-evaluation is highly valorised concerning the impact on school evaluation.

At the level of the transnational agenda, the data collected by the analysis of the reports (European Commission/EACEA/Eurydice, 2015; OECD, 2013; Santiago, Donaldson, Looney, & Nusche, 2012; UNESCO, 2017) show that there is an emphasis on display education quality as being related to the context. As the analysis of the national reports suggests, the discourse also emphasizes the school self-evaluation as the schools' internal mechanism that drives change and suggests that the articulation between EES and self-evaluation, is the most promising combination of a school evaluation system.

According to the data, the transnational backdrop causes a soft regulation (Jacobsson & Sahlin-Andersson, 2006), which does not oblige but foresees the necessary conditions to expand the agenda to several countries, through the transnational commitments. Thus, the Portuguese EES system has experienced vertical refraction (Goodson & Rudd, 2012) which is significant to the creation of *glocal* actors (Ball, 2016). Schools' Evaluation global trends are identified and transposed into the Portuguese schools' evaluation process but are rarely replicated as desired at

the Portuguese school practices (Sousa, 2019), creating side effects (Ehren & Visscher, 2006; Penninckx, 2017).

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