The role of the European inspections in the European educational space – echoes from Portugal regarding the assessment of schools

Estela Costa
University of Lisbon

Ana Márcia Pires
Portuguese Inspectorate of Education

ABSTRACT

This paper is an approach to the construction of a European educational space (Nóvoa & Lawn, 2002), which is due to new modes of regulation in education. The policy under consideration is the institutional evaluation of schools carried out by the Portuguese General Inspectorate of Education. The aim is to explore how concepts and policies get "contaminated" by the European models (Barroso, 2003, 2006) and understanding how the regulation is outlined by the Inspectorates in some European countries, including Ireland, England, Wales, Scotland, France, the Netherlands and Belgium. This paper owes to the phenomena associated to "travelling policies" (Alexiadou & Jones, 2001), to "policy transfer" (Dolowitz et al, 2000; Stone, 2001), and to "policy borrowing" (Halpin & Troyna, 1995; Steiner-Khamsi, 2004).

The authors' perspective on the influences of the international movement of policies is free from simplistic and deterministic logics (Lingard & Rizvi, 2000), advocating that the internationalization of ideas come along with national reflections on how these ideas are materialized (Popkewitz, 1996). At the local/regional levels, the regulation of educational systems can be characterized as a growing 'multi-regulation' - that comes from a growing number of sources and a variety of tools (assessment, monitoring and sharing best practices) - which mingle with modes that exist in a more traditional, bureaucratic regulation (Afonso & Costa, 2010). Thus, each country has its own overview about the structures, and effects of globalization, which do not occur simultaneously, nor in the same way in the different 'nation states' (Lingard & Rizvi, 2000).

Keywords: inspection, evaluation, regulation, Europeanization, education policy

1. THE IMPORTANCE OF EVALUATION IN THE CONTEXT OF THE EUROPEAN UNION

Since the last decades of the twentieth century assessment has become, globally, an institutional obligation in most developed countries. The Anglo-Saxon countries were the first to apply instruments for measuring the efficiency and quality, and were rapidly followed by large international organizations. Nowadays, the State is questioned about its traditional role, since the emergence of the Anglo-Saxon accountability, whose benchmarking and best practices permanently transform the concepts related to educational administration and increasingly influence management and governance.

On the 1st Conference on the Quality of Public Administrations in the EU, held during the Portuguese Presidency, in Lisbon, in 2000, a set of proposals were presented for the action program known as the "Lisbon Strategy". At that time, the European Council had the objective that the education and training system of the EU would become a global reference by 2010. The Lisbon Summit (2000) has characterized the Open Method of Coordination (OMC) as a means of disseminating best practices and of acquiring a greater convergence. Opposite to the classic process of European decision, the OMC consists in the establishment of guidelines for the EU Member States. It is based on a decentralized process of political construction among national governments, municipalities and civil society. It undertakes to set short-term objectives. The established policy is evaluated based on indicators and compared among the Member States. The process leads, in theory, to an emulation among Member States and it aims to develop good governance practices.

The modernization and improvement in public services has been an issue expressed at different institutional levels and the object of recommendations emanated from the Parliament and the European Council. The objective is to modify and streamline public management systems, so that the quality of services is reflected socially in the form of a society oriented to a knowledge-based economy and, accordingly, demanding a larger commitment from educational systems and subsystems. At the summit in 2001 were issued recommendations that strengthen the fact that the "quality of school education must be assured at all levels an in all areas of education, regardless of any differences in educational objectives, methods and needs, and regardless of school excellence and rankings where they exist" (ner 2 e 3). It's emphasized the need: "to develop external evaluation in order to provide methodological support for school self-evaluation and to provide an outside view of the school encouraging a process of continuous improvement and taking care that this is not restricted to purely administrative checks" (1.f.) and "encouraging and supporting, where appropriate, the involvement of school stakeholders, including teachers, pupils, management, parents and experts, in the process of external and self-evaluation in schools in order to promote shared responsibility for the improvement of schools" (European Parliament and Council, 2001).

These supranational procedures require forms of integration, incorporation and adaptation, focused "on the mediating actors who move between centre and locality" (Nóvoa & Lawn, 2002: 4), stressing the existence of several levels of regulation in what educational politics are concerned. Those levels are supranational, national and local and involve different institutions, actors and sources of regulation (Barroso, 2003, 2005, 2006, 2009).

The governance of Europe can be "conceptualized as a multilevel system of governance" (Nóvoa & Lawn, 2002: 5), stimulating European cooperation and the exchange of transnational experiences to identify and disseminate effective methods of quality assessment (n.er 10). In most European countries, educational policies have focused on the problem of change in education, either global, institutional reforms, or according to a logic of promotion of innovation by identifying and disseminating best practices. With the phenomenon of globalization (and Europeanization), the production of global frameworks for

interpreting the world tends to escape the national State, the borders and constraints of governments. As Barroso states (2003) it is 'transnational regulation', and the national regulation is a 'low intensity globalization' . The author (2003, 2005) refers to hybrid modes of institutional regulation and the crisis of the "State - educator", passed over by the State - market. This is clear in the proliferation of devices for evaluation and in the transfer of a control based on standards/rules for monitoring based on the results. The crisis of the State - Welfare is revealed and it is replaced by a State - evaluator, which expresses itself in promoting a competitive ethos through external evaluation (Afonso, 2001).

2. REPERCUSSIONS IN THE PORTUGUESE CONTEXT

The influence of the EU on the orientation and the legitimization of specific policy measures in the Member States allows to capture a set of modifications, transnational influences and interdependencies and, ultimately, contributes to the progressive structuring of a common European area of education.

In Portugal, the pressure of the external evaluation is propagated indirectly and subtly, through this new soft way of governance of the EU. This is visible in the restoration of national exams for secondary school conclusion and the creation of national benchmarking tests in the last year of each cycle of basic education (4th, 6th and 9th grades). However, since the academic year of 2004/2005, for the 9th grade, aferition tests were replaced by national tests for Portuguese Language and Mathematics. This focus on the evaluation of school performance led to the creation of the Educational Evaluation Office (GAVE), a central bureau of the Ministry of Education with functions of planning, coordination, preparation and control instruments for external assessment of learning as well as supervision of the accurateness of the tests. Moreover, the pressure of the external evaluation is also expressed through ordered lists of schools, based on the results obtained by their students in national exams - the rankings; as well as international programs of assessment of student performance, such as the Program for International Student Achievement (PISA), conducted by the Organization for Economic Co-operation and Development (OCDE). The disclosure of the results into a logic of hierarchy of the participating countries feeds a media debate about "quality education", usually developed in a logic of "common sense" and not related to the education professionals' "know how", or even with expressed disdain for such "know how" (Afonso & Costa, 2007; Costa & Afonso, 2009, Afonso & Costa, 2009, and Carvalho, Afonso & Costa, 2009).

3. THE POLICY OF EXTERNAL EVALUATION OF SCHOOLS IN PORTUGAL: THE NORMATIVE FRAMEWORK

From the normative point of view, this new paradigm is reflected in the Law 31/2002, article 3rd, which aims: "the improvement of the quality of the educational system, its organization and its levels of efficiency and effectiveness, to support the formulation and development of policies for education and training and ensure the availability of that management information system (paragraph a), article 3rd, Decree-Law 31/2002).

Through self-evaluation processes and external evaluation procedures, the external evaluation is seen as "a central instrument of policy education" (art. 3rd), and the relation among the micro, meso and macro levels of the educational systems is underlined. Article 9th presents the first indicators for the evaluation of the parameters of schools to take into account. In Articles 14th and 15th general and specific objectives of the evaluation are set, as well as the dissemination of its results (Article 16th).

The logic that rules is that of for monitoring and steering. Its focus is on the production of relevant information about the quality of performances (Afonso, 1999). According to Ball (2004: 1116), this makes "the monitoring role of the state" easier, because it governs in a distant way – "governing without government [...] and the work with the educational institutions' knowledge (knowledge-work) becomes 'results',' performance levels', 'quality forms'".

4. THE EXTERNAL ASSESSMENT OF SCHOOLS IN PORTUGAL: EUROPEAN INFLUENCES

"Post-bureaucratic" instruments, such as the assessment of schools, increasingly focus on self-evaluation and autonomy for best practices to be adopted, while rule compliance instruments tend to lose their traditional prominence as key elements in policy making. This is built up through scientific knowledge, selected mainly from school effectiveness and school improvement literature, as well as from the inspectors', principals' and teachers' professional know-how. There is the option for exterior knowledge, of an international nature (OECD, European Education Inspections, the Permanent International Conference of General and National Inspections of Education, etc). It is clear, in this process, the selection of certain kinds of products that insist on 'quality', 'accountability', 'benchmarking' and 'best practices' and its common reference to the new conceptions of the public administration (new public management), "educational modernization". The references and sources of inspiration are clearly outlined with reference to models used in the Education Inspections of European countries.

IGE's participation in SICI, and the models used in European countries (e.g. Scotland and Northern Ireland), as well as the investigation coming from different countries, are quite relevant, as it will be examined in next section.

4.1 CONTRIBUTIONS FROM EUROPEAN INSPECTIONS

It is not strange in Europe the change of the modes of regulation of public policies regarding education. Due to social, political and economic modernization, in the last two decades, the States felt the need to create and/or strengthen inspection systems that would enable them to monitor the practices of the units that comprise them. Mainly from the nineties onward, there was an increase of the inspecting action in several European countries in what the public sector is concerned.

The investigation that has been developed within the public policies at the level of the Inspectorate of Education stresses that the international debate on evaluation of schools has become central. Moreover, either due to managing reasons, or to increase autonomy and decentralization, many EU countries seek to implement a system of self-evaluation of schools. This has to do with the accountability, with the consequent restructuring of the external inspection (Meuret & Morlaix, 2003; Devos & Verhoeven, 2003; McNamara & O'Hara, 2006; Perryman, 2006; Plowright, 2007; Wolf & Janssens, 2007).

There seems to be a growing consensus: some forms of assessment can play a significant role in the efforts made to improve schools, as well as providing a reasonable level of public accountability, that prevails in democratic societies. Questions remain about how the balance can be achieved between these objectives. The framework provided by several authors illustrates convergent ideas, doubts and questions more or less common, based on the experience that the implementation of new policies has been offering. McNamara e O'Hara (2006) state that Ireland has been trying to develop an assessment of schools; this has been

done by balancing internal autonomy and accountability with external monitoring and inspection. The investigators refer to the progress that two evaluation projects provided, as well as their outcomes and consequences. The first, entitled Whole School Evaluation (WSE) was put into practice in the late nineties in 35 schools and it was completed in 1999. In 2003, comes the publication of a new framework for assessing schools, based on the WSE, and a second project called Looking at Our School (LAOS). The first evaluation of schools within this framework took place in 2004 and it highlights the emergence of an evaluative framework in a complex educational environment, in which teachers are highly resistant to what they consider to be interference to their professional autonomy.

The evolution from the WSE to LAOS shows, however, a clear progression from an external monitoring to a self-evaluation (McNamara & O'Hara, 2006: 569). The school managers who participated in the projects stated that any form of external assessment was, by its nature, superficial and that it underestimated the achievements of schools in non-academic aspects. This raised many concerns among teachers who, by contrast, considered self-evaluation without external monitoring a great success (McNamara & O'Hara, 2006: 570). However, the authors point out drawbacks of this process: many aspects are not taken into account by the school, because the project does not provide guidelines regarding the criteria and research methods, and schools aren't used to collecting and analyzing data in order to gather evidence on which to base their opinions; the concept of self-evaluation wasn't assimilated yet and there is no development plan for the school based on the results. Among the schools surveyed, there is also a profound skepticism regarding the intervention by the Department of Education and Science (DES) in cases where the assessment has indicated problems.

Thus, on the one hand, it would be useful that self-evaluation would be accompanied by more guidelines; on the other hand, it will take some time for a new structure to be assimilated. Finally, there are tools to be developed to improve the practices of schools whose self-assessment is not good. Plowright (2007) also wonders about the process of self-assessment of schools. The self-management of schools led to a greater pressure to take more responsibility for their development, progress, monitoring and review of educational provision. Aware of this fact in England, he questions the development of a school culture. One of his central questions is whether the school is developing an organizational culture of learning when it gets prepared for an external inspection through self-evaluation. Other questions that concern the author have to do with the inspection process, i.e., whether it contributes positively to school improvement, something also shared by Wolf and Janssens (2007). He also reflects on whether inspections can actually help schools to improve their ability to carry out self-evaluation; whether schools have the capacity to get involved in identifying their own problems honestly and rigorously. This last question meets Perryman (2006). Using the metaphor of the "panoptic gaze" to characterize the role of the Inspectorate in England and Wales, he launches a new question: the assessment the inspection makes is based on the self-assessment of schools, so, are the changes really assimilated by the school? (Perryman, 2007: 159).

Ehren and Visscher (2006) focus on a theory of school improvement, through the Inspectorate, in the Netherlands. They describe two types of inspections according to two different scenarios. Schools with a weak innovation capacity and few external impulses should be helped by a more directive approach in which the inspector clearly points out the strengths and weaknesses of the school, the causes of this underperformance and potential ways of improvement, pressuring it in order to commit formally to develop an improvement plan. Instead, a school with high innovation capacity and strong external impulses should have a more reserved approach and inspectors would only stress their strengths and weaknesses.

Wolf and Janssens (2007: 379) state that, in the Netherlands, new forms of accountability to improve school performance were introduced. These reforms were accompanied with discussions on the advantages and disadvantages of different mechanisms of external control in education, as well as an attempt to balance the different systems.

According to Meuret and Morlaix (2003: 54), French schools are encouraged to develop an "evaluation culture". Although schools are given indicators that assist them in this process, these tools are used by only about 5% of schools. Teachers say this happens because they lack the time and expertise to develop any kind of evaluation. Self-assessment is not popular, although there is a greater receptivity to this process than the external assessment itself. Although the investigators consider that there isn't evidence enough that self-evaluation can increase efficiency and improve the school, it seems to be useful. However, it is more praised by politicians than effectively used.

Devos and Verhoeven (2003: 403) report that, in Belgium, policy makers feared that a greater autonomy would lead to a deterioration of the quality of schools, hence the need for the verification of compliance with the objectives outlined. Inspectors seek to convince the school that the quality is not only reached by an external monitoring, but also through self-evaluation, and try to promote a culture of self-evaluation that the authors compare to that of the OFSTED.

The need to follow European trends is common to the Member States in general and to Portugal in particular. Indeed, the schools' self-assessment has come to occupy the political agenda in different countries. There's the belief that it may contribute to a significant improvement in schools' provision, assuming more responsibility in the identification and resolution of their issues. Investigation indicates that this is an ongoing process and there are positive and negative indicators. Equally striking is some resistance of the schools, in implementing self-assessment, in spite of, in the cases of Ireland and France, useful tools for the schools to monitor in this process having been provided. This resistance appears to be associated with the reluctance to change itself, although self-assessment has been better received than the external assessment alone. For some investigators, it is clearer that self-evaluation can help to improve the performance of schools, but doubts remain about the role of the Inspectorate in this process.

4.2. REGARDING THE MAIN SOURCES AND REFERENCES: THE SCOTTISH AND IRISH INFLUENCES

In 2006, in Portugal, the 17th Government launched a new experimental external assessment of schools Programme, coordinated by a School Evaluation Working Group, created under the Bureau of the Ministry of Education. The "School evaluation working group" (GTAE) was created within the Ministries of Finances and Public Administration and the Ministry of Education, for a year work. The main objective was to launch a national evaluation programme of non-higher education teaching establishments, with the aim to improve the quality of education and to create conditions to intensify schools autonomy. The work of this group, which was concluded in December 2006, conducted to the ministerial decision to proceed with the External Evaluation of Schools and to hand over the responsibility for its accomplishment to the IGE (Barroso et al., 2007).

Several different sources of information inspired the Portuguese policy of external evaluation. There are two models worth mentioning that are used in the UK. The Scottish model is a special case of transfer of explicit knowledge among the various member states, including Portugal: "because of the enormous popularity it enjoys in Europe and the educative dynamic that has promoted by giving schools the responsibility and the tools to question their own quality" (idem: 9).

According to GTAE, the handbook of self-assessment of the Scottish Inspection - "How good is our school" (2002, 2005) – is essential due to the clarity of the concepts and the formative nature of the model and the description of the evaluation criteria. "Exploring Excellence" is a more elaborate document and it introduces elements that were adapted to the Portuguese context, by making easier the internal benchmarking and by bringing a larger demand in the processes of comparability.

Also stressed is the Northern Ireland evaluation model, whose self-evaluation model is noteworthy because it is part: "of a national strategy to improve education, which includes the evaluation of schools, assessment and improvement of the curriculum and educational services at the different educational levels, improvement of the quality of initial and continuous teacher training and an overhaul of the inspection methods so as to help guarantee quality." Finally, there is the project ESSE (Effective School Self-Evaluation) created by SICI, which aimed to evaluate the consistency of self-assessment of schools and was also adopted in Portugal.

4.2.1 THE IGE'S PARTICIPATION IN THE STANDING INTERNATIONAL CONFERENCE OF INSPECTORATES OF EDUCATION

IGE's participation in the activities of the Standing International Conference of Inspectorates of Education (SICI) is an example of institutional and international cooperation. This organisation was established in 1995 and brings together inspection services from a large number of European countries, and its activities are focused on the exchange of experiences, development of partnership projects and the organisation of scientific and professional events for the discussion of inspection methodologies and the continuous training of inspectors. The importance of this institutional relationship is reinforced by the General-Inspector in the introduction to the Activities Plan for 2007, emphasising the International Conference of Lisbon to be held in November, in the context of the Portuguese Presidency of the European Union, as well as the organisation of the workshop "Inspecting for Equality in Early Childhood Services" promoted by OFSTED. The aims of this activity were based on their importance in terms of knowledge circulation: to participate in the activities of SICI as a way of exchanging information, models and perspectives that may benefit the configuration and performance of IGE; to gather information that will contribute towards the improvement of the profile of the inspectors, in relation to the new challenges they face (Barroso et al., 2007). As a corollary of perspectives provided by SICI members, it must be stressed the following items that influenced the Portuguese context: the revision of the inspecting mission; the redefinition of the role of inspectors; the monitoring and methodological support for self-assessment of schools and the increasing of schools autonomy.

SICI has contributed to the debate of education in Europe and the awareness that education is evolving rapidly, leading to new demands and expectations regarding the evaluation of its quality. There have been developments in educational systems, namely the trend to emphasize self-assessment of schools crossed with external evaluation, arising out of the propensity, at the European level, to increase school autonomy, leaving up to them the decision of their own modus operandi. There is also the need to take into account the individual characteristics and ambitions of the school organization and the learning that takes place outside the formal curriculum. Students, politicians and the public need assurance regarding the quality and the performance of schools. Technology is also changing the world

quite rapidly, including the ways people learn, communicate and share information. Therefore there should be an effort to modernize the tools of inspection, because the traditional fail to achieve the new goals. In its technical and scientific discourse, SICI also stresses that, in the European context, members of the EU set ambitious goals for their economies, societies and education systems to improve the quality and efficiency of education and facilitate access for all to lifelong learning, opening up education systems worldwide.

In short, despite the differences that separate education systems in Europe, it seems there is a trend towards convergence in European education policies emerging in the last twenty years, resulting in a growing autonomy of schools, even if controlled by several methods such as assessment and monitoring practices; a trend towards decentralization of educational systems; the growth of the external evaluation at the level of education authorities and intermediate level schools through external evaluation and self-evaluation; and legitimization and promotion at different stages of a larger school choice by parents. These changes in modes of regulation seem to be due to political and economic factors, such as changing economic contexts that conduct the school system to a raise of the level of skills, to be more efficient and to adapt education to the needs of the labor market; the policy demands for spending on education are more effective and efficient, with a reduction of financial resources in some countries, cultural change in favor of a greater individualization of education; and finally, globalization and international comparison of school systems have a greater influence on national and local policies through the dissemination of 'governance models', as well as management or educational models.

CONCLUSION

The transnational policies emanated from European institutions are 'itinerant policies', or 'vernacular for globalisation' (van Zanten, 2000). Local understanding of possible educational futures (Vongalis & Seddon, 2001: 1), influence policy and national and local educational practices, creating an environment of 'performativity' in school assessment (Lyotard, 1984, p.xxiv and Ball, 2004). Along with accountability, that assumes a central role rooted in the culture and practices of the public sector. Thus, there is a 'performance culture' related to the economic power, which is associated with the development of the comparisons of results, construction of standards and quality indicators.

In terms of schools assessment, the change in the new modes of regulation of education is caused by progressive focusing on audit programs and external evaluation rather than on devices of a compulsory nature. Here, it must be stressed the importance of the integration of IGE in SICI, and the redefinition of its mission in the late '90s, both in the organization's structure and its programs and projects. The institution that conducts external assessment in Portugal - IGE - has followed the evolution of new modes of regulation. Policies of external assessment also come from a recycling process of the inspection itself. Moreover, there was a key role played by a former General-Inspector, who had the knowledge about school assessment and came to influence indirectly the model of external assessment in Portugal.

As stated, in the European education area there is a clear trend of an evolution of 'hard' modes of regulation for a 'soft', more persuasive regulation. In Portugal, the political-educational setting, in what the evaluation of non-higher education institutions is concerned, is based on the weakening of logical rules of inquisition and bets on the voluntary membership of actors, their involvement and collaborative work. Legal traditional penalties of the classical instruments (hard regulation) give rise to indirect modes of regulation, based on social sanctions and the socialization processes that are used as powerful mechanisms of

compliance. It is a transnational nature of regulation that contributes to the gradual framing of a European educational space, which is under construction and that is based on instruments that seek ideational power (Marcussen, 2004).

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