Local Governance of Education Policy in Portugal: Multilevel Frameworks and Instruments

Governação Local de Políticas Educativas em Portugal: Quadros Multinível e Instrumentos

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Abstract

Portuguese Education Policy has witnessed several changes towards an increasing decentralization of power to the Local Government. Local education policy and planning instruments, such as the Educational Charter and the Strategic Educational Plan, have steadily improved, representing important steps in decentralization. While exploring the various dimensions that characterize contemporary educational policy in Portugal, particularly those highlighted during developing instruments, central priorities related to i) the supranational dimension, ii) decentralization of competencies, and iii) regulation of educational policy were identified. These priorities, in turn, result in a set of more operational challenges at the level of i) participation and legitimization of planning processes developed at the local level, ii) analysis of needs and opportunities, iii) monitoring and evaluation, and iv) integration with other sectoral policies. This paper stems from empirical expertise and knowledge transfer projects that aim to formulate the aforementioned local instruments framed within supralocal dynamics. Inevitably, these processes and instruments face several challenges.

Keywords: Education policy; Challenges; Instruments; Multilevel governance.

JEL Classification: I280; H520; H750

RESUMO

A política educativa em Portugal tem sido objeto de sucessivas dinâmicas que tendem a visar uma progressiva descentralização de competências para o Poder Local. Os instrumentos locais de planeamento e política educativa, como a Carta Educativa e o Plano Estratégico Educativo, têm sido consolidados, representando passos importantes no processo de descentralização. Da digressão pelas várias dimensões que caracterizam a política educativa contemporânea em Portugal, designadamente aquelas que foram destacadas aquando dos processos de elaboração dos instrumentos,

identificaram-se prioridades centrais relacionadas com: i) a dimensão supranacional, ii) a descentralização de competências e iii) a regulação da política educativa. Estas prioridades redundam, por sua vez, num conjunto de desafios mais operativos ao nível da: i) participação e legitimação dos processos de planeamento desenvolvidos à escala local, ii) análise de necessidades e oportunidades, iii) monitorização e avaliação e v) integração com outras políticas setoriais. Este artigo resulta de experiências empíricas, nas quais o fim é, justamente, a elaboração de tais instrumentos, em processos que se confrontaram com diversos desafios e que não podem ignorar as dinâmicas supralocais.

Palavras-chave: Política educativa; Desafios; Instrumentos; Governação multinível.

Classificação JEL: I280; H520; H750

1. INTRODUCTION

The increasing complexity of governance networks — spanning from supranational guidelines to local concerns — further complicates the multilevel governance of education, where a multitude of actors operate according to their specific contextual realities. Although decentralization to subnational authorities is occurring, it coexists with a growing supranational influence in shaping the overall strategic framework. In fact, these developments are interconnected, as international organizations often encourage countries to decentralize by highlighting its economic and political advantages (Vieira, 2021). This dual movement might have been expected to reduce the prerogatives of the national state. However, Portugal remains a highly centralized system (Barroso, 2006), where decentralization tends to occur through technical instruments—a defining feature of "policy instrumentation", a notion defined by Lascoumes and Le Galès (2007) to portray systemic mechanisms of policy operationalization—rather than through the transfer of strategic decision-making authority. As both the number of actors and instruments expand, the space for alternative policy paths contracts, contributing to the depoliticization of educational governance (Haughton et al., 2013).

At the national governance model level, administrative challenges primarily revolve around decentralizing competencies from central administration to local authorities. Most recently, the decree Decree-Law No. 21/2019, dated January 30, transfers responsibilities to the local dimension and poses challenges in formulating, implementing, and monitoring educational policies. Policy instruments, as described by Lascoumes and Le Galès (2007), often emerge as the most immediate means of operationalizing decentralization—though this process is rarely free from obstacles.

This reflection starts with the supranational dimension and subsequently addresses the current model of educational governance at the national level, intrinsically linked to educational planning instruments. We contend that governing through policy instruments may result in a form of apparent depoliticization, although those do not necessarily imply neutrality. This tendency can be counterbalanced by implementing participatory processes designed to include the community in the formulation of such instruments. In fact, the ongoing delegation of competencies aligns with arguments emphasizing greater proximity to local specificities (Santos et al., 2022) and citizen preferences (Borges et al., 2020), closely tied to instruments like the Educational Charter (EC) and the Strategic Educational Plan (SEP). This analysis will examine the (mis)alignments affecting effective policy implementation and highlight both the stable and fragmented ties among governance levels, with particular emphasis on instances of policy instruments.

Despite the uncertainties caused, the COVID-19 pandemic underscored the need for interaction across governance levels, highlighting key benefits (Grifo et al., 2021). It is expected and desirable to deepen multilevel governance to facilitate the diffusion and implementation of effective policies, increasing opportunities for partnerships, funding, and support. Furthermore, it is increasingly important to assess the effectiveness of policy instruments operating within intrinsically diverse contexts. Although this paper does not undertake such an assessment, it aims to identify the challenges — particularly at the local level — that may hinder the alignment of educational policies across different governance levels. The literature remains scarce in identifying these challenges, despite offering thorough analyses of supranational governance in education (e.g., Alexiadou et al., 2010; Barroso, 2006; Bulmer, 2007; Ringarp, 2016; Sahlberg, 2011), the delegation of power (e.g., Channa

& Faguet, 2016; Ruano & Profiroiu, 2019), and local policy instruments (e.g., Alves, 2015; Capucha & Alves, 2015; Castro & Rothes, 2014). These challenges are greatly acknowledged and categorized through instances of close collaboration between Public Administration and Academia. Accordingly, this paper emerges from such instances and seeks to shed light on the emerging shortcomings of the policy instruments ostensibly required by the multilevel governance of education.

2. METHODOLOGICAL APPROACH AND OBJECTIVES

This reflection stems from participation in developing local planning instruments and monitoring and evaluating local educational policies within subnational contexts characterized by distinct demographic, socioeconomic, and educational challenges. These projects aimed to promote participatory processes and involve community agents and were carried out between 2016 and 2023 in partnership with different entities and Portuguese municipalities, namely, six distinct municipalities from five national sub-regions. During this period, the authors co-authored six ECs, six SEPs and one monitoring project. For reasons of privacy and data protection compliance, no specific insight will be attributed to any individual project. This article does not intend to analyse the results of these processes but rather to address the governmental context in which their execution must be considered and the issues arising from the operationalization of public policy through its instruments.

Although these instruments are intended for municipalities and communities, they cannot ignore regional, national, or international policies, guidelines, or trends. Broadly, this article seeks to achieve three objectives:

• Present and systematize the main trends, instruments, and institutions of multilevel governance in educational policies, highlighting both its broken and sustained links;

• Examine current local educational planning instruments in Portugal amid growing decentralization and uncertainty, under the assumption that operationalization, depoliticization, and *supranationalization* are closely interconnected;

• Identify the main challenges underlying educational policy in Portugal.

A cross-cutting goal relates to the need to analyse the state of educational policy in Portugal, particularly planning at the local level, in articulation with supralocal governance (Grifo & Marques, 2023). This organization of ideas combines a reflection on existing literature (Castro & Rothes, 2014; Cordeiro, 2014; Santos et al., 2016) with considerations derived from empirical experiences. This reflection arises at a pivotal moment in Portugal, where the aftermath of the pandemic context, the decentralization process, and a new generation of Educational Charters coincide. At the same time, the structural problems of education and training in the country (Duarte et al., 2024; Louro et al., 2022), which were dormant during the pandemic, have resulted in heightened discontent and were key issues in the electoral campaign that led to the political cycle change in 2024.

This paper opens with a theoretical and regulatory framework informed by a broad body of scientific literature and selected key legislative texts. It then proceeds to examine the main challenges, drawing primarily on empirical insights obtained through various knowledge-transfer projects. Accordingly, the paper should be read as an essay that combines theoretical grounding with applied analysis. As noted, the existing literature on many of these issues has been invaluable, offering comprehensive and nuanced perspectives. Our intention is to anchor this work in that scholarly foundation, while applying an analytical lens enriched by empirically derived insights from the projects.

3. THEORETICAL AND REGULATORY FRAMEWORK

3.1. The supranational dimension in educational policy

Contemporary governance is characterized by articulation and coordination across various scales and for different purposes (Marks et al., 1996). The simultaneous strengthening of supranational and subnational jurisdictions lies at the heart of Marks' (1996) conceptualization of multilevel governance. Schmitter (2004) emphasizes the interdependence of a multitude of public and private actors engaged in ongoing or functional processes that are typically non-hierarchical in nature.

Rather than providing a detailed account of the various coordination links, this section seeks to emphasize their primary challenges, which are well documented in scholarly literature. In educational policy, while proximity is sought, the supranational dimension also gains prominence, proving Marks' (1996) definition and giving rise to what Sahlberg (2012) describes as the Global Education Reform Movement (GERM). At this crossroads, various mechanisms are employed to shape different national-supranational relationships (Dale, 1999) and to enable processes of recontextualization within local settings (Ball, 1998). These developments are often framed within the broader trend of new managerialism, which has permeated educational systems across the globe (Gewirtz & Ball, 2000). A consensus among international institutions regarding strategic priorities, goals, and indicators for measuring the success and positioning of states relative to agreed targets has become evident (European Commission, 2023; Matthews et al., 2008). However, this emphasis on quantification has also been criticised and, at times, referred to as a "tyranny of numbers" (Ball, 2015).

There is alignment between the United Nations (UN), the Organisation for Economic Co-operation and Development (OECD), and the European Union (EU), particularly concerning strategic priorities such as skills and lifelong learning, thereby setting the agenda and reference discourse. There is also alignment in objectives, where education is market-driven and articulated as essential for individual success and as a determinant of economic growth. The years 2020 and 2021 reinforced the consensus on prioritizing digital and technological resources in learning, with evident alignment between the Digital Education Action Plan (European Commission, 2020) at the European level and the National Digital School Program (Directorate-General of School Establishments, 2020) at the national level. Such convergences do not necessarily result in identical reports or instruments, as differences persist in the emphasis placed on efficiency, equity, or cohesion (Duarte et al., 2024). Although clear dissensus is rare, this leaves little room for alternative epistemologies (Nóvoa, 2013).

Additionally, the OECD and the EU agree on a set of comparative indicators that deepen knowledge about the educational systems of their member states. Reports such as the **Education at a Glance** (OECD, 2019) and the **Education and Training Monitor** (European Commission, 2023a) assess states' success using performance indicators, enabling comparisons and positioning against targets over a ten-year horizon.

Although the comparative endeavour is valuable (particularly to illustrate diversity across national realities), these reports and their policy-as-numbers approach (Lingard, 2011) can lead to perverse effects, such as pressure to meet targets regardless of the context (Sellar, 2015) and of individuality.

Still within the European framework, despite educational policy being subject to the Open Method of Coordination (Wilkoszewski & Sundby, 2014) and not obliging states to adopt mandatory norms and directives, it remains advisable to follow European guidelines (Alexiadou et al., 2010), namely those advanced by the Strategic Framework for Education and Training. This recommendation aligns with cohesion policy funding frameworks, which aim to stimulate investment in priority growth areas. The European Social Fund is a critical pillar, ensuring investment in projects and programs tailored to the educational needs of each territory (European Commission, 2018). The European Regional Development Fund (ERDF) has also played a role in educational interventions, particularly those focused on physical infrastructure, which were framed within the scope of the Educational Charter (Cordeiro & Martins, 2011; Santos et al., 2016).

International reports like PISA have often emerged as alerts and catalysts for broad educational reforms (Ringarp, 2016; Sahlberg, 2011). However, socioeconomic contexts dictate the applicability of international guidelines, while leadership and governmental programs influence policy direction (Risse et al., 2019). Each state's reality points to distinct priorities, objectives, and practices, further shaped by historical trajectories and legacies (Bulmer, 2007).

Nevertheless, education continues to be shaped predominantly by a market-driven and individual-centred logic, promoted through instruments such as comparative reports and statistics—seemingly neutral, yet reflective of dominant paradigms. The international education discourse has already influenced the national education policy agenda, with pressure felt to improve results in comparative indicators (Nóvoa & Yariv-Mashal, 2003). Thus, we are confronted with forms of soft power and narrative diffusion that manifest themselves in education investment and growth strategies—at times resembling "harder" forms of soft governance (Schoenefeld & Jordan, 2020) rather than mere soft coordination mechanisms. One frequently suggested path by international organizations, based on the principle of subsidiarity and the assumption that proximity promotes better

education (Channa & Faguet, 2016), involves decentralization by transferring competencies to municipalities. Decentralization in educational policy is a well-established trend in various states whose administrative organizations facilitate it differently (Ruano & Profiroiu, 2017). Despite its challenges, decentralization has been highlighted to bring educational policy closer to citizens, navigating the complexity of multilevel governance. Lower tiers of government are increasingly likely to find themselves at a crossroads, as their deep understanding of local challenges frequently remains unmet by prevailing market-oriented, individualistic strategies and is further constrained by the scarce resources and limited autonomy provided by the national state.

3.2 RECENT NATIONAL GUIDELINES

National-level orientations often echo transnational policies and the Structural Funds framework, which encourages decentralization by assigning implementation power to subnational authorities. The pandemic context readjusted national strategies until 2030, reinforcing learning recovery while simultaneously focusing on the digitalization of education as part of a national strategy and competitiveness-oriented agendas.

Educational programs backed by European funds, as outlined in the **Operational Program for Human Capital (POCH)**, reinforced the need for an integrated vision of the education sector policy oriented towards employment and other areas, such as social policies. Subsequent instruments, whether the **Portugal 2030 Strategy** or the **Recovery and Resilience Plan**, keep pursuing the principles of previous programs. Strategies for recovery, resilience, and capacity-building of individuals and communities become priorities.

The main responses tend to focus on intangible measures aimed at improving education in Portugal, arising from the very nature of the **Europe 2020 Strategy**. However, the current decentralization wave compels an adjustment of territorial models to ensure equitable access to educational infrastructure (Marques et al., 2021) and services of general interest (Gonçalves, 2018), thereby moving beyond the confines of immaterial policy measures.

While potential discontinuities persist—such as those concerning the teaching workforce, large-scale assessments, or privatization trends—the combined use of immaterial and material policy interventions may contribute to a stable educational policy framework that endures beyond electoral cycles and is responsive to local socio-educational needs (Santos et al., 2022). Although the principle of decentralization appears to enjoy consensus among the mainstream political parties, the prevalence of claims requiring central decision-making can subordinate long-term vision and the extended temporal process of policy development.

The definition and operationalization of priorities, policies, and investments—established based on agreements between Portugal and the European Commission in education and other domains—should prioritize coordinated action among decision-makers, staff officials, and civil society representatives across various territorial scales, if Schmitter's (2004) conception of multilevel governance is to be upheld. At the same time, efforts must be made to evaluate the measures taken, contributing to the adequacy of strategic instruments in the medium and long term (e.g., progress reports and evaluations of the Portuguese educational landscape) (Cefai et al., 2018).

This analysis centres on national policy guidelines concerning local school success and infrastructure improvement, rather than on more contentious policy areas that reflect supranational dynamics. One such area is the increasing involvement of private actors in education, visible not only in the growing prevalence of private tutoring (Moreira & Neto-Mendes, 2025) but also in the outsourcing of services that are either educational in nature (Verger & Moschetti, 2017) or closely related to education (Gerrard & Barron, 2020). Nevertheless, the administrative emphasis on policy instruments continues to echo broader supranational trends.

3.3 Current governance model

The current governance model influences how broader guidelines are translated from the Ministry of Education to local contexts. At the central state administration level, there is a well-established structure of bodies and services: the Directorate-General for Education (DGE) provides pedagogical guidance, the Directorate-General for School Administration (DGAE) manages the teaching

worfkorce, the Directorate-General for Education and Science Statistics (DGEEC) gathers and manages statistical data, and the General Inspectorate for Education and Science (IGEC) inspects education provision. The Directorate-General for School Establishments (DGEstE) is the only entity with devolved units, thus directly liaising with local authorities and schools.

The regionalization process on the mainland remains on hold, despite some recent efforts to empower intermunicipal communities. These have been emerging as stronger players, either through their responsibilities within the management of European funds or through the delegation of power by the central government (Gonçalves et al., 2024).

It is acknowledged that, in the absence of an intermediary governance structure (OECD, 2020), the consolidation of national education policy and its translation to regional and local scales may be constrained. Even so, regionalization, should it occur, does not guarantee success (Bilhim, 2019; Vieira, 2021). Local action in education policy development (enacted in instruments such as the Intermunicipal Strategic Development Plans for Education, School Transport Plans, Municipal Educational Charters, and Municipal Strategic Educational Plans) requires final approval by those organs. Besides including a strategic dimension, these instruments involve close collaboration between national, regional, and local educational institutions and agents. The departments of the Ministry of Education are responsible for approving the educational charter, the school transport plan, and the multi-annual plan for the educational offer network, in accordance with Articles 14, 16, 22, and 28 of Decree-Law No. 21/2019, dated January 30.

Municipalities, schools, and other local community agents have assumed an increased role in education governance, ideally working in tandem to avoid the pitfalls of municipalism, which are a source of concern for school-based actors. Their functions include regulating education policy and mediating various stakeholders to achieve consensus during decision-making processes (e.g., opinions issued by the Municipal Education Council as an advisory body, Articles 55 and 56 of Decree-Law No. 21/2019, dated January 30). While municipalities have acquired new competencies, schools have also undergone structural adjustments over the past three decades. The reorganization of schools into clusters (*agrupamentos escolares*) has reshaped governance and management practices—though, as noted by Lima and Torres (2020), its impact has been limited.

This model, in which various entities position themselves along vertical and horizontal logics, combines state directives with the close intervention of local agents. However, it also reveals a gap at the intermediary governance level, which may impede communication between central and local administrations and complicate decision-making processes. These challenges are compounded by the proliferation of communication channels, as schools must now navigate interactions with both proximate interlocutors and central authorities.

3.4 Transfer of competencies in education

Sharing responsibilities between central state entities and local power bodies is increasingly challenging (Santos et al., 2019). Delegation of competencies to municipalities emerged to simplify the state's administrative functions in managing educational policy. However, fulfilling these functions by decentralized bodies requires legitimizing decisions and mobilizing human and financial resources to materialize actions.

Since the 1976 Constitution of the Portuguese Republic, several steps have been taken towards administrative decentralization, namely in education (e.g., Decree-Law No. 77/84, dated March 8, and Decree-Law No. 399-A/84, dated December 28). Additionally, the Basic Law of the Educational System of 1986, which establishes the general framework of principles for education in Portugal, originally included a set of guidelines reinforcing the role of local governments and other institutions in administering and developing the Portuguese educational system. However, these provisions remained largely unimplemented for an extended period.

Concurrently, the successive updating of legislative decrees regarding local-scale educational planning instruments also reflects progress in decentralization (Santos, 2017). The evolution of these decrees has been accompanied by conceptual changes that reveal shifts in how the geographical-administrative territory is viewed and politically organized. More recently, examples include adopting a municipal education council and municipal educational charter (e.g., Decree-Law No. 7/2003, dated January 15) instead of a local council and school charter (e.g., Law No. 159/99, dated September 14). More than a mere semantic shift, this adjustment sought to encourage compliance, after

a first half-hearted attempt. Similarly, the change from a local educational project to a municipal strategic educational plan illustrates a paradigm shift (e.g., Decree-Law No. 30/2015, dated February 12, and Decree-Law No. 72/2015, dated May 11) that intends to stress long-term planning. Despite these terminological differences, the concepts share common aspects, such as guiding local action and bringing decision-makers closer to educational communities, tying school administrators, politicians, and officials.

The most recent regulatory changes aim to frame and define new municipal and inter-municipal competencies in various areas, including education (e.g., Law No. 50/2018, dated August 16). Among these, the introduction of Decree-Law No. 21/2019, dated January 30, and its updates (7th version, Decree-Law No. 125/2023, dated December 26), is noteworthy. This law concretizes the transfer of competencies to municipal bodies in planning, managing, and executing educational investments and to inter-municipal entities in planning the inter-municipal network for school transport and educational offerings (Articles 1 and 2 of Article 3). Before the advent and impact of the COVID-19 pandemic, the transfer of competencies was expected to be completed by early 2021 (Article 2 of Article 3 of Law No. 50/2018, dated August 16). However, the pandemic context required an extension of the deadline for transferring competencies in education and health, as stipulated by Decree-Law No. 56/2020, dated August 12, with contracts signed by March 31, 2022. Some municipalities were even opposed to receiving the new competencies (Lira et al., 2022), and recent reports have identified deficiencies in their implementation—primarily due to insufficient financial resources and misalignments between central mandates and local realities (Tribunal de Contas, 2024). Gonçalves et al. (2024) have recently shown that existing governance capacity may influence a municipality's willingness to assume new competencies. In their analysis, the authors identify a set of typical roles that municipalities tend to adopt within the realm of educational policy: promoters, partners, providers, managers, and recruiters.

Decentralization may encounter additional challenges rooted in the historically embedded local governance models. According to Moreira and Alves (2024), varying contexts, capacities, and governance paradigms give rise to three distinct local governance models—socio-communitarian regulation, municipal governance, and ambiguous centralism— once again emphasizing diversity rather than convergence.

3.5 Local-scale instruments – EC and SEP

The new legal framework seeks to incorporate a strategic dimension into municipal educational charters, grounded in an integrated and action-oriented approach, thus combining the material and immaterial sides (Santos et al., 2019). Whereas earlier waves of Educational Charters (EC) and Strategic Educational Plans (SEP) resulted in two separate instruments, a new generation of educational charters appears to be merging them, even if the Decree-Law No. 21/2019 does not explicitly mention SEPs. Concurrently, the strengthened role of inter-municipal entities, reflected in the mandatory reassessment of multi-annual planning of educational offerings every five years (Article 28, Paragraph 2 of Decree-Law No. 21/2019), may indicate an intention to formalize a new type of inter-municipal SEP.

In the initial phase of developing educational charters, often referred to as the first generation of ECs, the focus was on the tangible dimension of education, tied to planning and organizing the municipal school network and educational offerings (Article 10 of Decree-Law No. 7/2003, dated January 15). This first wave of ECs, developed by Portuguese municipalities starting in 2003, often incentivized by funding for physical interventions (Cordeiro, 2014; Santos, Cordeiro, and Alcoforado, 2013; Santos and Cordeiro, 2014), included prospective evaluations of school buildings and educational facilities (Santos, 2017). It also followed a supply-driven approach (Santos et al., 2014).

The drafting of these initial Charters coincided with a wave of school closures, primarily driven by Central State reforms (Ferreira, 2011), which not only ran counter to the local empowerment these instruments aimed to promote but were also perceived as disconnected from popular participation and support, triggering resistance from local communities (Matos and Solovova, 2016). Although there was some interaction between local and regional authorities at both political and administrative levels, negotiations frequently reached a stalemate (Matthews et al., 2008).

In early 2015, following prior political decisions by the central administration (such as the Education Proximity Program), a second generation of ECs emerged due to the need to revise the initial

charters alongside SEPs and to address its many shortcomings. SEPs were conceived as participatory instruments intended to articulate a shared vision for education, encompassing the organization of the school network as well as the educational and training offerings (Costa et al., 2017; Article 8 of Decree-Law No. 30/2015, dated February 12, and items d) and i) of Paragraph 1 of Article 4 of Decree-Law No. 72/2015, dated May 11). This second generation of Educational Charters (ECs) sought to align a technical perspective on the projected supply of educational facilities with the priorities and expectations of those most attuned to socio-educational contexts—namely, local education communities and decision-makers. The integration of the two instruments was considered desirable in their development, with the SEP providing the overarching vision and guidelines to inform the EC's proposals, and the EC's decisions emerging from consensus built through participatory processes.

Actions aimed at promoting academic success and other intangible dimensions are also included in the educational charter, according to the 2019 decree law (DGEEC, DGESTE & IGEFE, 2021; Article 7 of Decree-Law No. 21/2019, dated January 30). This integration appears to be designed to strengthen shared accountability, thereby fostering improved coordination between supra-municipal guidelines and local-level initiatives involving technical experts, stakeholders, and decision-makers.

This potential third generation of ECs should assist municipalities in identifying and addressing demographic and socioeconomic challenges that significantly impact the management of the school network and local educational policy in the medium and long term, creating, whenever possible, perspectives for other development scenarios. In light of increasingly complex social and territorial patterns, responding to current and future demands for educational facilities (Marques, Tufail, et al., 2021) requires a conscious awareness of the pace of change and the anticipation of strategies to accompany this evolution.

While the COVID-19 pandemic highlighted the social role of schools and demonstrated the added value of municipal action—capable of delivering swift responses under adverse conditions—it also reinforced the need for incremental improvements and a deeper commitment to the decentralization process. The pandemic emphasized that the "school of the future" must be both technologically advanced and community-oriented.

Despite common guidelines, evidence suggests a tendency among some municipalities to bypass national guidelines (Santos et al., 2016; Santos et al., 2022), leading to heterogeneous policy instruments and the omission of critical components, such as monitoring mechanisms (Grifo et al., 2025). Recent policy developments appear to have been, at least in part, designed to address this unintended variability.

The projects where the authors were engaged, developed in partnership with Portuguese municipalities, revealed evolving methodologies underpinning educational instruments. From an operational standpoint, these methodologies can be enhanced by articulating four core components in a coherent and integrated manner (Santos et al., 2019):

1. **Strategic Educational Diagnosis** – Resulting in a model that combines demographics, socioeconomics, and education with a forward-looking perspective;
2. **Consultation with the Local Educational Community** – Allowing moments of knowledge sharing and construction, affirming local educational identity, co-responsibility, and enrichment of the strategic diagnosis;
3. **Local Educational Strategy** – Grounded in the collective vision and aligned with the diagnosis and supralocal guidelines, materialized through axes, objectives, and strategic actions promoted by various entities;
4. **Monitoring** – Based on indicators and targets that enable tracking and adjusting educational policy against initial objectives.

4. CHALLENGES OF THE LOCAL EDUCATIONAL GOVERNANCE

4.1 Participation and legitimation of processes

Decentralization is believed to legitimize educational policy decisions if it promotes local educational communities' proximity to governance. Despite weaknesses that may arise from an intermediary governance level that is still underdeveloped, consultation processes within the scope of

ECs and SEPs provide opportunities for involvement (Costa et al., 2017) in the design, implementation, and monitoring of policies (Paragraph 1 of Article 14 and item b) of Paragraph 1 of Articles 56 and 57 of Decree-Law No. 21/2019, dated January 30). After the first State-led interventions (Ferreira, 2011), largely detached from popular support (Matos and Solovova, 2016), participation has been encouraged (Almeida, 2014; Alves, 2015; Capucha & Alves, 2015; Neves et al., 2017).

To ensure greater effectiveness in communication and decision-making between different governance levels, from transnational regulation to local and national regulation (Barroso, 2006), the involvement of stakeholders in various stages of the educational policy cycle raises challenges. These include mobilization and representativeness, adapting discourse to accommodate concerns and expectations, and valuing the pedagogical nature of participation (Borges, 2022; Borges et al., 2024). Another set of challenges relates to the participation of private actors. As these actors are increasingly involved through outsourcing and, at times, through forms of "hidden privatisation" (Ball & Youdell, 2007) of educational services (Gerrard & Barron, 2020; Verger & Moschetti, 2017), their exclusion may risk delegitimizing the policymaking process, while their inclusion can, in some cases, lead to the capture of decision-making by private interests.

As with other participatory processes, surveys are often the preferred method, but consultation exercises frequently serve as token gestures intended to appease citizens (Valente et al., 2021). Conversely, surveys may offer a means of mitigating the risk of policy processes being captured by particular interests.

Other research projects involving the authors have further revealed two key findings regarding the legitimation of processes within the multilevel governance framework. First, intermunicipal entities are still in the process of establishing a clear and authoritative role in educational governance. Diversity remains a defining feature: previous projects demonstrated that while some intermunicipal entities engage exclusively with municipal councils, others actively involve schools in their governance networks. The second finding points to a noticeable reluctance among intermunicipal entities to fully assume—and even more so to expand beyond—the competencies legally conferred upon them.

4.2 Analysis of needs and opportunities

The strategic dimension of ECs and SEPs should anticipate needs and opportunities, not just in the short term but particularly in the medium and long term. In other words, it is essential that these instruments, which guide decisions and actions on the ground, are based on prospective analyses that combine technical knowledge with the empirical knowledge of local agents (Article 5 and Paragraph 4 of Article 6 of Decree-Law No. 21/2019, dated January 30).

Strategic planning for an educational territory requires analysing, extrapolating, and debating the dynamics that characterize and may influence this context—educational, demographic, or socioeconomic. The timely collection and processing of information tailored to these needs not only represents two significant challenges but also involves issues related to reconciling different sources of information, coordinating various technical teams, and interacting with educational agents.

Decree-Law No. 21/2019 envisions consolidating local and inter-municipal competencies in organizing the network of educational establishments and training offerings, reflecting the municipality's strategy for promoting educational success (Article 7 of Decree-Law No. 21/2019, dated January 30). Recent policy junctures have added intricacy to this challenge. The digital transformation, whose urgency was heightened by the COVID-19 pandemic, has solidified digital equipment as an essential educational infrastructure. More aware of the strategic importance of digitalization, municipalities have been working towards digital capacity-building and responding to equipment shortages among students during the pandemic. They are essential in implementing co-financed projects such as the Digital Transition Plan for Education and the National Initiative on Digital Competencies, e.2030.

More recently, strategic forecasting efforts have suffered a setback due to the intensification of the influx of migrants, leading to the need to adjust some planning instruments. Recent statistics, particularly for OECD countries, show that in 2023 migration reached record levels among permanent migrants and asylum seekers. The growing flows have thus contributed to the debate and reflection on the impact of migrants on the economies and societies of host countries, where the regulation of migration has come to the forefront of political agendas and voter concerns. Portugal's

recent past shows different behaviours when it comes to migration. As a result of the economic and financial crisis, between 2010 and 2016, it is possible to identify a period in which migratory balances began to register negative values, which does not mean that there was no inflow of foreign population (Malheiros, 2024). After 2016, despite the fluctuations, the migratory balance turned positive, maintaining an upward trend from 2020 onwards, with a very significant increase between 2021 and 2022 (over 60,000 new foreign residents) (PORDATA, 2025). Rather than temporary movements, the upward trend appears to be gaining structure, highlighting legitimate challenges that can, and should, be transformed into opportunities if well internalised in the design of appropriate policies (OECD, 2024, pp. 4-5).

4.3 Monitoring and evaluation

Building and affirming a continuous educational policy remains one of the most significant challenges. However, if, throughout its lifecycle, the policy encounters more barriers than incentives for its evaluation, it will not be possible to implement monitoring routines as a processual approach (Vedung, 1997). One of the main objectives associated with evaluating and monitoring local educational policies, as with other policies, is to collect and analyse information that allows the assessment of results against initially defined targets. The information used may vary significantly, encompassing indicators, educational programs, and the community's perceptions of the implemented measures (Grifo et al., 2024).

This may be the stage at which supranational governance in education has most visibly asserted its influence, particularly by emphasizing the importance of monitoring educational and performance outcomes. Whereas supranational actors are often criticized for presenting oversimplified realities through limited or inadequate indicators (Ball, 2015; Lingard, 2011), local governance—through a place-based approach—can offer a more contextualized perspective, directly aligned with the operational realities of educational institutions.

Assessing the efficiency and effectiveness of a municipal educational policy raises numerous questions related to the type of information to be selected and the results to be measured. The complexity of the different governance levels where decisions are made, the diverse educational contexts where measures are implemented, and the emergence of contextual constraints make this task even more challenging (DGEEC, 2022; DGEEC, 2024). Among the main challenges are the selection and structuring of the information to be monitored, the definition and measurement of results, the calibration of targets within a timeline aligned with political cycles in multilevel governance, and the co-responsibility and coordination between decision-makers, the community, and technical teams (Borges et al., 2024).

The inherent proximity at the local level enables the execution of monitoring practices that combine learnings from supranational monitoring systems with in-depth and contextual analyses that go beyond the policy-as-numbers approach (Lingard, 2011). Program outcomes do not always translate neatly into standardized quantitative indicators, which often overlook the diverse starting points and contextual specificities of each locality. However, it is important to recognize that municipal and school actors are already burdened with significant bureaucratic responsibilities, as the central government continuously demands detailed statistical reporting at the local level. Consequently, the monitoring and evaluation mechanisms embedded in local instruments should be carefully designed to avoid creating an additional layer of administrative work—one that risks diverting local and school actors from their core strategic and pedagogical functions.

4.4 Integration with other sectoral policies

The ambition to advance educational policies is accompanied by the challenges associated with adopting an integrated vision that projects a more concise portrait of the context and more sustainable options for the future. Recent advancements in educational instruments and how the debate has been fostered at the local level reveal a stable importance of education in the political agenda, serving as a structuring axis for the development and cohesion of territories. Therefore, these instruments must align with other orientations within broader policies and territorial management (Paragraph 5 of Article 6 and Paragraph 7 of Article 14 of Decree-Law No. 21/2019, dated January 30).

Educational territories—understood in both their material and immaterial dimensions—are shaped by decisions made across multiple scales and policy domains, as well as by broader social and economic dynamics that span sectors. For example, recent data from the **2023 Monitor** highlights that the early school dropout rate in rural areas of Portugal is significantly higher than in cities (7.9% compared to 4.9%), a difference exceeding the EU average (3.0 percentage points compared to 1.4 percentage points) (European Commission, 2023b, p.9).

The pandemic highlighted certain priorities and issues that were previously overshadowed, allowing a more detailed understanding of the purposes of education beyond performance metrics. This interpretation underscores the need for articulation with other policies, particularly those of a social nature, in order to counterbalance the predominantly market-driven framework surrounding education. The pandemic shed light on the social responses of schools, promoting equity and equal opportunities, notably concerning meal provision and support for students with special health needs. Moreover, it emphasized the need to address more severe consequences related to the worsening of child poverty (Van Lancker & Parolin, 2020).

Such complexities will amplify the challenge posed by the latest generation of Educational Charters, given their experimental nature and the inclusion of immaterial dimensions in the legal sphere of educational territorial planning. However, integrating the components of ECs and SEPs also represents an opportunity to consolidate a more inclusive and consequential educational planning instrument. Such an instrument would legitimize and hold accountable decisions from the local scale to broader levels.

At the supranational level, the cross-sectoral nature of education policies frequently aligns them with market-driven and employment-oriented priorities. Although social concerns and inclusion are prominently featured in policy discourse, educational strategies often display a disproportionate focus on their intersection with labour market and economic objectives. Striking a balance between these supranational, market-oriented frameworks and locally grounded, inclusion-focused approaches remains a significant challenge. Nevertheless, it is essential to adopt a nuanced perspective—one that recognizes both the supranational commitment to social and inclusive policy goals and the legitimacy of local economic imperatives. Ultimately, the cross-sectoral nature of educational policymaking appears to be an inescapable feature of contemporary governance.

5. CONCLUSION

Understanding how the current governance model in education contributes to implementing and aligning educational policies inevitably involves comprehending the challenges that take on significance locally, where decisions translate into tangible impacts. Likewise, understanding the model's capacity for adjustment requires reflecting on the evolution perspectives associated with the described challenges, particularly those stemming from the supranational dimension, decentralization, and the regulation of educational policy from a more operational perspective.

The development and application of methodologies enabling educational policies raise diverse questions related to how processes are conducted and of a technical nature. Simultaneously, challenges resulting from the need for articulation, monitoring, and evaluation are compounded.

Throughout this paper, we have argued that policy operationalization led by its instruments is a pervasive phenomenon across the three principal levels of educational policy. Although the transnational (particularly European) level lacks formal lawmaking competencies, it advances its paradigm through a largely uncontested discourse—one that is embedded in instruments centred on numbers and statistics, thereby exerting pressure on nation-states to meet specific performance targets. We have also argued that policy instruments are at the core of the ongoing decentralization process that has led to Portuguese municipalities embracing new competencies in educational policy. Accordingly, we have chosen to highlight the evolution, achievements, and current limitations of these policy instruments. Strengthening them through more effective participatory mechanisms, timely needs assessments, comprehensive monitoring processes, and genuine cross-sectoral integration could enhance their legitimacy.

However, such improvements may still be perceived as insufficient by local actors, who remain burdened by bureaucratic demands and constrained by limited resources. While these local instruments occupy a central position in the multilevel governance of education—linking European, national, and local levels—their highly technical nature risks contributing to an aura of

depoliticization. Although participatory processes may help counter this tendency, the ongoing decentralization effort will likely require further structural reinforcements to achieve its intended success.

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