

Logics of the institutionalization of school assessment: a meta-analysis

Lógicas da institucionalização da avaliação das escolas: uma meta-análise

Lógicas de la institucionalización de la evaluación escolar: un metaanálisis

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Highlights

School evaluation as a cornerstone educational policy.

School assessment between performative effect and the logic of democratization.

Contributions to the (re)theorization of school evaluation in Portugal.

Abstract

This study is framed within the scope of meta-analytic research and focuses on school evaluation as a cornerstone educational policy. Methodologically based on Grounded Theory and following a qualitative systematic review approach, this study seeks to holistically organize the conceptual frameworks of school evaluation in Portugal as examined in national academic research. The general outcome of our findings points to a normalization of school functioning and of the meanings attached to the delivery of public educational services, within a hegemonic culture of performativity. This culture has been firmly established through both internal and external evaluation mechanisms in Portuguese public schools, resulting in a substantial reduction in the democratizing effects on decision-making in educational action.

[Resumo](#) | [Resumen](#)

Keywords

Public school. School evaluation. Meta-analysis.

Received: 03.19.2024

Accepted: 12.06.2024

Published: 12.16.2024

DOI: <https://doi.org/10.26512/lc30202453172>

| Introduction

Internal and external school evaluation has been emerging in Portugal as one of the cornerstone educational policies. Although its structure (Law no. 31/2002, of December 20 [Portugal, 2002], as amended by Article 182 of Law no. 66-B/2012, of December 31 [Portugal, 2012]) is now definitively normalized, accepted, and widely consensual across society, our central objective is to analyze and systematize the orientations of this evaluation as they appear in leading academic research, based on methodological procedures specific to systematic content meta-analysis.

Underlying this methodological choice is the assumption of pursuing an innovative path in educational meta-analysis, moving beyond description toward understanding and (re)theorizing the educational phenomenon here defined as *school evaluation*. We draw from the epistemological questions posed by Strauss and Corbin (1998, p. 127), and advance the following research questions: *i)* What is school evaluation? *ii)* When does it happen? *iii)* Where does it happen? *iv)* Why does it happen? *v)* How does it occur? *vi)* With what consequences does it manifest? As a starting point, we articulate our research problem by positioning ourselves between two opposing conceptions: one that aligns school evaluation with the organizational performativity of schools and their actors, and another that, through its recent institutionalization, aims to enhance the quality of public education services, even at the cost of a progressive democratization of school functioning. Therefore, we more explicitly formulate the following guiding question: How is school evaluation in Portugal characterized—in terms of conception, periodicity, contexts, actors, and purposes—and with what logics and effects has it been institutionalized: in line with performativity or, conversely, with the democratization of the public education service? Aligned with this line of inquiry, we place special emphasis on understanding the relationship between school evaluation and competing agendas, particularly the contrast between evaluation as embedded in a market-driven, economic performativity framework and its potential vocation to foster greater democratic functioning within schools.

| A Brief Revisit of Contemporary Meanings in School Evaluation

In a broader approach, it is relevant to inquire into school evaluation policy within the framework of the globally structured agenda for education (Dale, 2000; Antunes, 2005), aiming to reveal the accountability purposes (Afonso, 2017; Ólafsdóttir et al., 2022a) underlying its emergence in the national context—while also acknowledging its entanglement with influential supranational agendas, such as those promoted by the Organisation for Economic Co-operation and Development (OECD) and the European Commission (EC) (European Commission, 2018; Reis & Araújo, 2023). In this regard, particular emphasis is placed on the idea that external school evaluation is expressed as “[...] contact with schools, in the form of external auditing, operating under a logic of ensuring accountability” (Sousa & Pacheco, 2018, p. 835).

This favors standardization, externality, and quantification of results, inspired and legitimized by new public management theories (Sousa, 2020; Watts & Quigley and Watts, 2023). Consequently, it becomes embedded within the classical innovation model, aligned with a top-down logic (Santos Guerra, 2013), reinforcing a normalized prescription of performance production (Gouveia, 2017; Ólafsdóttir et al., 2022a), expressed through account extraction procedures (Lima, 2015), under the authority of central administration—which thereby assumes the role of evaluator and regulator based on results (Watts & Quigley and Watts, 2023). This process results in what Afonso (2017) has described as the contemporary *evaluocracy* agenda.

Acknowledging the ambivalence of the effects of external school evaluation, we return to an alternative possibility raised in our research question: the democratization of public education. This emerges as a critical analytical lens through which school evaluation should be understood. From this perspective, concepts such as autonomy (organizational and professional), emancipation, horizontal/local regulation, and participation gain special relevance (Lo, 2020). This calls for the emergence of peer-led professional regulation, fostering:

[...] a transformative positioning, through the articulation of ideas, exchange of opinions among peers, personal rethinking by the teacher and the school: a pedagogical regulation in an educational perspective of learning—constructivist, participatory, collaborative—in a process of reflection and improvement from within the school community. (Miranda et al., 2023, p. 4)

The drive for democratic school action, combined with the idea of full professional collaboration, should manifest in the sharing of responsibilities, resources, and joint decision-making, guided by common action strategies (Semião et al., 2022), and grounded in self-evaluation processes that promote teachers' professional development (Ólafsdóttir et al., 2022b). In this way, peer supervision becomes associated with the idea of: “[...] collaborative supervision, which (in direct contrast to vertical pedagogical supervision) emphasizes the role of teachers in improving their practices, through a mutual, horizontal support attitude” (Miranda et al., 2023, p. 4).

Thus, the democratizing effect of school evaluation is tied to the domain of organizational and pedagogical relationships, within which the notion of the participatory actor is enacted—an actor who is present, critical, and emancipated in contrast to technocratic rationalities, where the school is reimagined as a space conducive to the realization of democratic educational action:

[...] a place for the exchange of words and actions among all those present, in a fully egalitarian relationship. Thus, in this space of encounter among all ordinary subjects, the school environment becomes a meaningful site for the exercise of democracy as a lived experience, where it is possible to go beyond the impossibility of educating, healing, and governing. (Rodrigues, 2023, p. 202)

Within the interface between school, evaluation, and democracy, the democratizing effect challenges the notion of institutional evaluation as a mechanism of domination—of leaderships mandated to command and ensure compliance with a

specific prescription or heteronomous evaluation framework. It calls into question the growing trend whereby technobureaucratic leaderships replace democratic and participatory leaderships (Tavares, 2021), thereby imposing implementative logics and top-down responsiveness (Lima, 2015), in clear contrast to: “[...] the praise of the school as a space for the exercise and realization of democracy [...]” (Rodrigues, 2023, p. 196).

| Methodology

This is a meta-analysis, defined as a technique for integrating results from empirical research studies (Lo & Lo, 2014), framed as a comparative and systematic analysis of a specific object of study, based on the assumption that:

Meta-study consists of several analytical stages: meta-data-analysis, meta-method, and meta-theory, which lead to a meta-synthesis—a new body of knowledge constructed through these analytical steps. [...] A systematic study can be applied not only to quantitative data, such as those measuring outcome efficiency, but also to explore the underlying reasons for problems and personal experiences, through qualitative data analysis. (Cooper et al., 2012, p. 3)

Additionally, we adopted procedures from systematic non-frequency-based inference analysis (Bardin, 2016), specifically of the thematic-categorical type (Poirier et al., 1983).

Regarding the constitution of the documentary *corpus* (see Chart 1), and based on an initial sampling procedure (Charmaz, 2009), we examined qualitative data derived from academic research. The main selection criterion for the documents was the breadth and relevance of the investigations, specifically those whose objects of study involved multiple variables, conceptual assumptions, conditions, and actors. As a second fundamental criterion, we considered doctoral studies focused on the Portuguese educational context.

Chart 1

Composition of the Documentary *Corpus*

Code	HEI	Reference
D1	University of Lisbon	Simões (2010)
D2	Catholic University of Portugal	Castro (2012)
D3	University of Minho	Correia (2011)
D4	University of Évora	Silvestre (2013)
D5	University of Lisbon	Gonçalves (2013)
D6	University of Lisbon	Tristão (2016)
D7	University of Évora	Correia (2016)
D8	University of Aveiro	Campos (2017)
D9	University of Porto	Sampaio (2018)
D10	University of Minho	Costa (2020)
D11	NOVA University Lisbon	Magalhães (2021)
D12	Open University	Tavares (2021)

Source: The author.

In line with this, the study is also grounded in the qualitative assumptions of Grounded Theory (Glaser & Strauss, 1967; Charmaz, 2009; Glaser, 2011), considering that:

[...] through its steps, it enables a careful journey to identify convergences, divergences, and similarities, leading to a kind of knowledge that, like a weaving process, works through each part of the narratives to grasp the whole of the analysis; the result is neither the sum of the parts nor smaller than them, but rather a unique and singular whole which, under a new perspective, may yield a new conclusion—and, for that reason, it remains provisional. (Prigol & Behrens, 2019, p. 17)

On the one hand, we carried out an initial/open coding process (Charmaz, 2009), corresponding to the first analytical contact with the selected data, covering all information available within the chosen documentary corpus. This procedure was guided by the set of research questions previously outlined. Each question operated as a distinct analytical segment, and from the identification of indicators, we coded data using short and simple terms—without yet engaging in conceptual transitions or theoretical positioning (Prigol & Behrens, 2019). On the other hand, axial coding (Strauss & Corbin, 1998) was consolidated through a system of categories, subcategories, and corresponding indicators, sequentially organized around the guiding epistemological questions. As Charmaz (2009, p. 145) puts it, this stage aims to: “[...] outline the properties of a category, verify insights about the categories, saturate the properties of a category, establish distinctions among emerging categories, and identify variation within a process.”

The overall process resulted in: “[...] a procedure that consists of relating categories to their subcategories, using the term ‘axial’ because coding takes place around the axis of a category, linking categories at the level of properties and dimensions.” (Strauss & Corbin, 1998, p. 123) We adopted the general function of establishing coordinates for systematizing data related to the guiding epistemological questions mobilized in this study (Charts 2, 3, and 4). This corresponds to a regrouping of categories, associating them with their respective subcategories, based on the indicators previously coded and organized into autonomous matrices¹.

| Presentation of Results Based on Axial Categorization

The practical outcome of the intersection between initial/open coding and axial coding resulted in the following axial categorization matrix (Charts 2, 3, and 4), organized as a systematic presentation of data based on the non-frequency-based appearance of indicators in each document under analysis:

¹ Due to the extensive volume of these matrices—and considering the space limitations of the text—they are not presented explicitly.

Chart 2

Axial categorization of the analysis – related to conditions

Epistemological questions / Categories	Subcategories (properties of each category resulting from the appearance of context indicators)
<p>It is a mechanism of monitoring, regulation, quality control, and strategic management.</p>	<p>It operates through a top-down system of regulation, control, and surveillance. It constitutes a form of strategic school management that attracts the interest of both central and local decision-makers. It emerges as pressure from cyclical demands requiring equally cyclical responses. It functions as a mechanism for organizational learning. It contributes to the construction of quality indicators and standards. It is integrated into the school's strategic planning. It reflects the traits of evidence-based management.</p>
<p>It involves accountability.</p>	<p>Understood as a collective acceptance process of organizational responsibility. It acts as a monitoring system fueled by both internal and external interests and expectations. It is also characterized by bureaucratic exuberance over results. It aligns with a culture of academic success. Ideology of <i>evaluocracy</i> and quantifiable outcomes.</p>
<p>It reflects the influence of New Public Management.</p>	<p>It is the result of the institutionalization of principles brought forth by New Public Management. It responds to pressures from the (quasi-)global market and the dominance of neoliberal logic. It operates as a mechanism that regulates and normalizes the school's openness to society. Self-evaluation is often idealized by top-level leadership.</p>
<p>It is guided by pre-constructed reference frameworks.</p>	<p>Frameworks "dropped from above." It embodies an action strategy oriented toward organizational isomorphism. It is imbued with high technical complexity in its processes.</p>
<p>When does it happen?</p>	<p>Periodically</p> <p>Evaluation is understood as a phenomenon that must be addressed routinely and cyclically.</p>
<p>Where does it happen?</p>	<p>It occurs inside the school, influenced by both external-to-internal and internal-to-external dynamics.</p> <p>Top-down logics are inherent to external evaluation. Self-evaluation serves as a mechanism for self-justifying organizational successes and failures. Symbolic legitimation—through the school's image and reputation—acts as a defensive and anticipatory tactic in the face of potential unfavorable scenarios. It becomes a strategy to save face.</p>

Why does it happen?	To meet quality agendas.	To ensure the quality of educational services in relation to national and supranational agencies. The discourse of quality prevails over the discourse of emancipation. It aims to demonstrate the quality of educational services delivered to the community. Bureaucratic control, supervision and regulation Post-bureaucratic control and regulation It becomes a mandatory bureaucratic ritual.
	Schools and actors are framed as performers.	It exemplifies organizational performativity. It reinforces mechanisms of self-justification for organizational successes and failures. Symbolic legitimation—through the school's image and reputation—acts as a defensive and anticipatory tactic in the face of potential unfavorable scenarios.
	It enforces an obligation to render accounts.	Accountability to society is mandatory.

Source: The author.

Chart 3

Axial Categorization of the Analysis – Related to Actions and Stakeholders

Epistemological questions / Categories	Subcategories (properties of each category resulting from the appearance of context indicators)
How does it happen?	<p>It is based on pre-established reference systems. It operates through an autocratic referential logic. It is oriented toward measurable results. It involves formal enactment and ritualization.</p> <p>There is a peaceful coexistence between articulation and disarticulation of processes. Participatory and democratic logics are inhibited. The processes are quantifiable and primarily concerned with “accountable” items. Higher hierarchical positions tend to ensure greater and more stable agreement with the evaluation process.</p>
By whom?	<p>The General Inspectorate of Education plays a central role. Teachers are mostly concerned with fulfilling bureaucratic procedures and maintaining the professional image of their class. Non-teaching staff are more indifferent or detached from the consequences of the evaluation. Parents or guardians tend to act more strategically, focused on the school's ability to “keep” their children safe. Top and middle management are more aligned with the official evaluation agenda. The “critical friend” acts as a safeguard, ensuring things are done properly while helping maintain appearances. Private consultants are an emerging strategy aimed at enhancing the efficiency and effectiveness of evaluation processes.</p>

Source: The author.

Chart 4

Axial Categorization of the Analysis – Related to *Consequences*

Epistemological questions / Categories	Subcategories (properties of each category resulting from the appearance of context indicators)
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">With what consequences does it happen?</p> <p>It results in macro and meso-level regulation.</p>	<p>There is a ranking effect. It produces both social and institutional regulation (at macro and meso levels). It favors (quasi-)market regulation—vertical regulation over horizontal regulation. It leads to the internalization of market-based regulatory logics. It establishes periodic performance control. It carries a punitive versus rewarding function. It reinforces brand image and status affirmation. It fosters competitive logics between schools. It encourages consumer-like behaviors as theorized in public choice models. It generates tensions around discourses of social justice, equality, and equity. It is incompatible with the inclusive education/school movement. It leads to teacher fragmentation and individualism. Cooperation emerges as a ritualized strategy, validated upstream but suppressed downstream in pedagogical and didactic processes.</p>
<p>It reconfigures the school's organizational structure.</p>	<p>It shapes a (neo)institutionalist image of the school. It produces a neobureaucratic and/or post-bureaucratic image of the school. It reinforces the image of the school as a business. It contributes to the image of the school as a space of organized hypocrisy. It also projects the image of the school as a learning organization.</p>
<p>Accountability becomes normalized.</p>	<p>External evaluation compels internal evaluation. It fosters the bureaucratization of educational change and innovation—through improvement plans. It promotes a process of actor alignment with established educational agendas. It fuels an obsession with statistics.</p>

Source: The author.

Meta-Analytical Theoretical Coding: Discussion of Results

We begin by addressing the question: *what is school assessment?*, bringing semantic perspectives that frame school assessment as a system of regulation, control, and surveillance imposed from the top down. Its aim is to ensure that peripheral actors meet expectations, interests, and pre-rationalized demands—both internal and external to the school—through an autocratically established referential framework (Simões, 2010; Castro, 2012; Correia, 2011; Silvestre, 2013; Gonçalves,

2013; Tristão, 2016; Correia, 2016; Campos, 2017; Sampaio, 2018; Costa, 2020; Magalhães, 2021; Tavares, 2021). Moreover, evaluation—remaining under the aegis of a business-oriented metaphor—imparts a sense of strategic management aligned with that same framework of expectations, interests, and providential demands. This orientation is necessarily inscribed within the organizational and professional logic instrumentalized to meet the System’s programmatic expectations (Mayntz, 1977), and to legitimize decisions across multiple scales (central and peripheral). The result is a tendency toward organizational isomorphism in schools, regulating their calculated openness to the community (Simões, 2010; Castro, 2012; Silvestre, 2013; Gonçalves, 2013; Tristão, 2016; Correia, 2016; Campos, 2017; Sampaio, 2018; Costa, 2020; Magalhães, 2021; Tavares, 2021), in which evaluation is used to know, predict, and control (Franco, 1990). Also embedded within a globally structured education agenda (Dale, 2000; Antunes, 2005), school evaluation retains the prerogative of being accepted as a neoliberal ideological substratum—collectively endorsed insofar as it is perceived as one of the most important tools for holding schools accountable to society (Paquay, 2004; Afonso, 2017; Ólafsdóttir et al., 2022a). It aligns with the principles of new institutionalism, through the institutionalization and normalization of New Public Management dogmas (Simões, 2010; Silvestre, 2013; Gonçalves, 2013; Tristão, 2016; Correia, 2016; Campos, 2017; Sampaio, 2018; Costa, 2020; Magalhães, 2021; Tavares, 2021).

Regarding the Questions *When* and *Where Does It Happen?* It can be inferred that school assessment has increasingly established itself as a form of pressure placed upon school leaders and other actors. This occurs within the framework of a cyclical or periodic demand, which likewise requires a periodic response (Simões, 2010; Castro, 2012; Tristão, 2016; Correia, 2016; Campos, 2017; Magalhães, 2021), symbolizing, in this sense, the imprint of a certain bureaucratic exuberance regarding quantifiable school results (Ólafsdóttir et al., 2022a; Watts & Quigley and Watts, 2023), relying on a normalized culture of statistical data as a hallmark of the culture of measurable school success (Torres & Braga, 2022; Simões, 2010; Castro, 2012; Correia, 2011; Silvestre, 2013; Gonçalves, 2013; Tristão, 2016; Correia, 2016; Campos, 2017; Sampaio, 2018; Costa, 2020; Magalhães, 2021; Tavares, 2021), under the sign of an *evaluocracy* ideology (Afonso, 2017). This framework directs the conception of the school as a learning organization, guided by a set of pre-established quality standards (Sousa, 2020), where evaluation indicators are subjected to the infallibility of statistical evidence (Torres & Braga, 2022), often produced on a seasonal basis (Simões, 2010; Castro, 2012; Correia, 2011; Silvestre, 2013; Gonçalves, 2013; Tristão, 2016; Correia, 2016; Campos, 2017; Sampaio, 2018; Costa, 2020; Magalhães, 2021; Tavares, 2021). The centrally defined evaluation framework, beyond introducing a high level of technical complexity—particularly in self-assessment processes (Castro, 2012; Gonçalves, 2013; Correia, 2016)—has primarily led peripheral actors to rationalize school evaluation as a mechanism conceptualized by top-level leadership. This framework is then imposed on internal actors within the school organization and strategically displayed to external stakeholders, serving the purpose of symbolically legitimizing the institution’s image and reputation (Simões, 2010; Castro, 2012; Correia, 2011;

Silvestre, 2013; Gonçalves, 2013; Tristão, 2016; Correia, 2016; Costa, 2020; Magalhães, 2021; Tavares, 2021).

Regarding the Epistemological Question *Why Does It Happen?* The answer provided by our meta-analytical inquiry aligns with the attribute of a globally structured education agenda mentioned earlier. It assigns to assessment the role of managing the quality of educational services in light of “[...] the forces exerted by international ‘standardizers’ [...]” (Carvalho & Costa, 2017), as well as by national agencies (Ministry of Education), where the discourse of quality (Torres & Braga, 2022) prevails over the discourse of emancipation and democratization (Lima, 2015) within school contexts (Simões, 2010; Castro, 2012; Correia, 2011; Silvestre, 2013; Gonçalves, 2013; Tristão, 2016; Correia, 2016; Campos, 2017; Sampaio, 2018; Costa, 2020; Magalhães, 2021). Accordingly, doctrinal incursions emerge, such as the organizational performativity of public schools and the quality of educational services provided to the community (Simões, 2010; Castro, 2012; Correia, 2011; Silvestre, 2013; Gonçalves, 2013; Tristão, 2016; Correia, 2016; Campos, 2017; Sampaio, 2018; Costa, 2020; Magalhães, 2021), aligned with the neoliberal ideological substratum of accountability (Afonso, 2002; 2017; Ólafsdóttir et al., 2022a). This unfolds within a school structure subject to bureaucratic control, oversight, and regulation *through* and *by* results (Domingues & Costa, 2021; Tavares, 2021; Silva & Pinto, 2022). *Per se*, internal assessment mainly functions as a process of symbolic legitimation (the school's image and reputation), serving as a defensive and anticipatory tactic for unfavorable scenarios (Simões, 2010; Castro, 2012; Correia, 2011; Silvestre, 2013; Gonçalves, 2013; Tristão, 2016; Correia, 2016; Magalhães, 2021; Tavares, 2021).

Similar arguments guide us toward answering the question *How does it happen?* That is, school assessment presents itself as yet another technically and bureaucratically prescribed ritual, relying on a reference system constructed according to a top-down logic (Santos Guerra, 2013). In accordance with that logic, the higher hierarchical position within the school organization plays the important role of monitoring, managing, and executing the assessment process in line with pre-established references (Lima & Torres, 2020), thereby ensuring a greater and more stable level of alignment with the evaluation, even though organizational action may fall into processes of formalistic performance and ritualization, marked by a peaceful coexistence between articulation and disarticulation—*anxiety, fear of penalization versus ritual and enactment* (Simões, 2010; Castro, 2012; Correia, 2011; Silvestre, 2013; Gonçalves, 2013; Tristão, 2016; Correia, 2016; Campos, 2017; Sampaio, 2018; Costa, 2020; Magalhães, 2021; Tavares, 2021). Amidst the ritualism attributed to it, school assessment still does not appear as a widely participatory and emancipatory sphere (in the strictly meso- and micro-political sense). On the contrary, it tends to suppress participatory logics of negotiation, dialogue, collegiality, autonomy, and the confrontation of differing interests (Semião et al., 2022), as well as collective wisdom in the service of improving student learning and school quality (Simões, 2010; Correia, 2011; Silvestre, 2013; Gonçalves, 2013; Tristão, 2016; Magalhães, 2021), thus compromising any prospect of democratizing school contexts through institutional evaluation (Tavares, 2021).

From the answer to the question *by whom?*, we infer a pseudo-polycentric participation, aimed at effectuating a tacit process of legitimizing assessment, which compels the plural involvement of various actors (Simões, 2010; Castro, 2012; Correia, 2011; Silvestre, 2013; Gonçalves, 2013; Tristão, 2016; Correia, 2016; Campos, 2017; Magalhães, 2021), with particular emphasis on the following: the Inspectorate-General of Education and Science as the central supervisory authority; teachers, who are the most concerned with fulfilling bureaucratic procedures and with how these may affect their public image as a professional class; parents and guardians, who take a more calculated view regarding the school's capacity to "look after" their children and meet their class-based expectations and interests; top and intermediate leadership, where leadership is understood as complementary and subsidiary to the notion of management (Silva & Pinto, 2022), are more closely aligned with the official evaluation agenda. This reflects a concept of "[...] sustainable leadership, oriented toward quality [...]" (Sousa & Pacheco, 2018, p. 837), marked by a constant concern with self-legitimation (Sousa, 2020) through the narratives generated by institutional evaluation; the school principal, in particular, who acts as the guardian of the school's performative culture, assuming the latest administrative roles linked to evaluation (Hargreaves, 1998); the critical friend, as a safeguard to "get things right" while helping maintain appearances; and private consultants, as an emerging strategy to improve the effectiveness and efficiency of evaluation processes, now in a more professionalized version. In general, the rules of *how to act* are normalized and institutionalized, producing a prescriptive effect capable of triggering the "[...] mobilization of these rules, on a national scale, by heterogeneous actors, according to their knowledge and resources for action, and the specificities of the systems of meanings and power relations in the contexts in which they intervene" (Carvalho & Costa, 2017, p. 686).

Concluding with the epistemological question *with what consequences does it occur?*, we would say that school assessment reaffirms itself, at all times, as an instrument of macro and meso regulation (external and internal) (Simões, 2010; Castro, 2012; Correia, 2011; Silvestre, 2013; Gonçalves, 2013; Tristão, 2016; Correia, 2016; Campos, 2017; Sampaio, 2018; Costa, 2020; Magalhães, 2021; Tavares, 2021). That is, "[...] it is guided by explicit notions of planned regulation" (Carvalho & Costa, 2017, p. 686), which tends toward a tacit ranking effect, accompanied by the prerogative of quasi-market regulation (dispersed across various regulatory centers), even though vertical regulation prevails over horizontal forms, revealing a clear internalization of market-based regulatory logic (Lima, 2015; Simões, 2010; Castro, 2012; Correia, 2011; Silvestre, 2013; Gonçalves, 2013; Tristão, 2016; Correia, 2016; Costa, 2020; Magalhães, 2021). Indeed, the indicators used to build the subcategories associated with this analysis reveal a predominantly technocratic dimension of school assessment, since throughout the institutionalized procedural flow that defines it, one observes a "[...] regulation structured by the flow of technical documents" (Carvalho & Costa, 2017, p. 693). In addition to enabling periodic performance control mechanisms (Pacheco & Pestana, 2014), especially considering that what is at stake is the organization's image and status, several key prerogatives are attached to it: branding, affirmation of image and status, logics of competition between schools, and consumer-like behaviors tied to public choice theory—students and families as consumers/clients

and teachers as (re)producers (Simões, 2010; Castro, 2012; Silvestre, 2013; Gonçalves, 2013; Tristão, 2016; Correia, 2016; Costa, 2020; Magalhães, 2021).

Looking at the answers provided to the previous epistemological questions, we observe alignments with the theoretical coding developed for this final question, where the broader (neo)institutionalist image intersects with a dual image of the school as both neobureaucratic and post-bureaucratic (Barroso, 2011) (Simões, 2010; Castro, 2012; Silvestre, 2013; Gonçalves, 2013; Tristão, 2016; Correia, 2016). To this diptych image, we must add certain metaphorical traces of the image of organized hypocrisy, centered on the ritualistic and ceremonial impulse observed in peripheral school assessment practices (Simões, 2010; Castro, 2012; Correia, 2011; Tristão, 2016; Correia, 2016; Sampaio, 2018; Magalhães, 2021). This also reveals the predominance of the image of the school as a business, aligned with the *economization* of education through assessment (Figari, 2001), which promotes and fuels the private tutoring market (Gouveia, 2017) and the principles of efficiency- and effectiveness-driven schooling (Lima & Torres, 2020; Simões, 2010; Castro, 2012; Correia, 2011; Silvestre, 2013; Gonçalves, 2013; Tristão, 2016; Correia, 2016; Costa, 2020; Magalhães, 2021). Moreover, considering that external evaluation mandates internal evaluation—with the latter functioning as a reactive and preparatory response to the former—the image of the functionally learning school also persists (Simões, 2010; Castro, 2012; Correia, 2011; Silvestre, 2013; Gonçalves, 2013; Correia, 2016; Costa, 2020; Magalhães, 2021). In this context, cooperation is portrayed as a strategy of ritualization that is validated upstream but suppressed downstream in organizational, pedagogical, and didactic processes. This often results in the perverse effects of teacher fragmentation and individualism (Miranda et al., 2023; Semião et al., 2022; Simões, 2010; Castro, 2012; Correia, 2011; Tristão, 2016; Correia, 2016; Magalhães, 2021; Tavares, 2021). Such dynamics, in turn, generate tensions around discourses of justice, equality, and social equity (Simões, 2010; Castro, 2012; Correia, 2011; Gonçalves, 2013; Correia, 2016; Campos, 2017). Furthermore, the absence of inclusion-oriented indicators suggests an evaluation framework disconnected from the inclusive education movement, where the positive effects of assessment “[...] are less evident in students’ outcomes and in family engagement with school life—elements that could contribute to the promotion of curricular equity and justice as part of a broader agenda of social justice and democratic education” (Sampaio & Leite, 2016, p. 115).

| Final Note

In conclusion, the prevailing conception of school assessment aligns metaphorically with the idea of an old remote control—sufficiently distant from any prerogative that might associate it with the decentralization of the system or with school autonomy. Under the weight of a corporatized society, the school—through the assessments to which it is subjected—submits to an isomorphism of its own institutional image, held hostage by the need to meet society’s expectations through an institutional evaluation that functions primarily as a mechanism of accountability to external actors, to whom those expectations are directed. An evaluation that, while

presented to contexts and actors as a cyclical external process, is intended to function as a permanent technical-managerial mechanism within the internal dynamics of the institution. Beyond its already complex and demanding techno-bureaucratic exuberance, it represents one of the most strategic functions of school leadership, now clearly dressed in the garments of a peripheral technocracy, guardian of the normatively imposed performativity of school organizations and their actors. It also operates as a new source of school power, a power imposed from above and maneuvered from below, often executed as a symbolic ritual—on one hand, with great scenic visibility, and on the other, guided by a semblance of organized hypocrisy, where anxieties, fears, and the exercise of power and privileges—*by and for those who* conduct the process—appear to coexist peacefully. Thus, school assessment submits itself to an educational liturgy with dogmatic contours at both national and supranational levels, in which quality—allegedly neutral—emerges as one of its core creeds, governed by various commandments (effectiveness, efficiency, academic performance, school success, organizational learning, professional competence and development, among others). In this context, notions such as democracy, negotiation, dialogue, participation, collegiality, cooperation, and collectively constructed educational wisdom—*for and through* the educational community and territory—are reduced to mere euphemisms, serving only to legitimize technocratic forms of leadership, wherein assessment becomes a managerialist emblem, shaped by the influence of executive leadership, critical friends, and private consultants.

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Resumo

O presente estudo organiza-se na linha dos estudos meta-analíticos, tendo como objeto de análise a avaliação de escolas, enquanto política educativa de charneira. Estando metodologicamente suportado na Teoria Fundamentada nos Dados, na linha da revisão sistemática qualitativa, o objetivo do estudo é sistematizar, de forma holística, os alinhamentos da avaliação de escolas em Portugal, enquanto objeto de estudo visado na investigação académica nacional. O quadro geral das nossas ilações aponta para uma normalização do funcionamento das escolas e dos sentidos da prestação do serviço educativo público no âmbito de uma cultura hegemónica de performatividade, definitivamente instituída pela avaliação interna e externa da escola pública portuguesa, cujos efeitos de democratização da decisão sobre a ação educativa surgem substancialmente diminuídos.

Palavras-chave: Escola pública. Avaliação de escolas. Meta-análise.

Resumen

Este estudio se organiza en la línea de los estudios metaanalíticos y tiene como objeto de análisis la evaluación escolar como política educativa clave. Metodológicamente basado en la teoría data-driven, en la línea de una revisión sistemática cualitativa, el objetivo del estudio es sistematizar, de forma holística, las alineaciones de la evaluación escolar en Portugal, como objeto de estudio de la investigación académica nacional. El marco general de nuestras constataciones apunta a una normalización del funcionamiento de las escuelas y de los significados de la prestación de los servicios públicos de educación en el marco de una cultura hegemónica de la performatividad, definitivamente instituida por la evaluación interna y externa de las escuelas públicas portuguesas, cuyos efectos sobre la democratización de la toma de decisiones sobre la acción educativa parecen sustancialmente disminuidos.

Palabras clave: Escuelas públicas. Evaluación escolar. Metaanálisis.

Linhas Críticas | Journal edited by the Faculty of Education at the University of Brasília, Brazil
e-ISSN: 1981-0431 | ISSN: 1516-4896
<http://periodicos.unb.br/index.php/linhascriticas>



Full reference (APA): Ramalho, H. (2024). Logics of the institutionalization of school assessment: a meta-analysis. *Linhas Críticas*, 30, e53172. <https://doi.org/10.26512/lc30202453172>

Full reference (ABNT): RAMALHO, H. Logics of the institutionalization of school assessment: a meta-analysis. *Linhas Críticas*, 30, e53172, 2024. DOI: <https://doi.org/10.26512/lc30202453172>



Alternative link: <https://periodicos.unb.br/index.php/linhascriticas/article/view/53172>

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