Curricular Studies and their Relation with the Political Agenda for Education

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Since the end of the 20th century Portugal has witnessed the rise of a movement promoting curriculum changes. In basic and secondary education this has meant the adoption of policies seeking the equality of opportunities to school access and success. This was first stated in the Law 46 of 1986. Since then (predominantly between 1997 and 2008), a number of political measures have been taken to achieve this goal. However, few studies establish a relation between scientific production and curricular policies. This paper aims to answer the question: What is the relationship between educational politics and the foci of curricular studies? Accordingly, this paper begins by situating the main features of the curricular policies that have characterised this period, while also considering international policies influences. This constitutes the basis of empirical research developed in three consecutive phases: i) systematisation of the curricular studies produced in Portugal between 1997 and 2008; ii) identification of the studies’ foci; iii) establishment of relationships between those foci and curricular political measures. The analysis allowed concluding that the production of studies focusing on the curriculum in Portugal was determined by the curricular political agenda and that the international agenda significantly influences the curricular political agenda.

1. Educational and curricular policies in Portugal in a time of globalization: from the 20th century towards the 21st century

The end of the 20th century and the beginning of the 21st century were marked in Portugal by curricular policies that introduced changes in the ways of conceiving and developing the curriculum, from pre-school to secondary education (K to 12). Significant changes also occurred in higher education due to the Bologna Process and the statute of the teaching career. Ideologically, these policies aimed to introduce necessary changes for achieving a system of inclusive schooling. The principles that constituted the guidelines in the period that followed the April 1974 revolution were first stated in the Basic Law of the Portuguese Educational System BLPES – Law 46/86 of 14th October. In higher education, from a curricular perspective, the need for a paradigm change was expressed, replacing the traditional paradigm focused on teaching for one focused on learning (Leite, 2007, Fernandes, 2009).

The changes made in basic and secondary education during the transition from one century to another assigned more decision-making power to schools and teachers. Both political and academic discourses stated that the curriculum that is prescribed nationally is a project that needs to be contextualised locally. This can be achieved through school and class curricular projects designed to adapt the national curriculum to
the local context (Bernstein, 1980, 1990; Roldão, 1999; Leite, 1998; Fernandes, 2011). In Portugal, this scheme corresponded to a break with a strongly centralised curricular tradition that conceived the national curriculum as a recipe to be prescribed equally to all schools and teachers throughout the country. Dispensing with this practice, it was acknowledged that each team of teachers should plan and develop curricular projects taking into account the students’ interests, cultural experiences, previous knowledge, learning modes, difficulties and achievements. In short, it was decided that each school should have a curricular project that was able to recontextualise (Bernstein, 1990) the national curriculum.

It seems clear that this curricular procedure resulted in a rewriting of teachers’ roles. Teachers started to be seen as curriculum co-developers (Shkedi, 2006), engaging in the collective construction of curricular innovation processes. In other words there was a commitment for change, not only in teachers’ curricular thinking, but also in schools and in the organisation and development of curricular processes. As stated by Shkedi (2006, p. 719), curricular innovation means to change “teachers, classrooms and schools cultures”, meaning that teachers see themselves as “curricular constructors” and that the schools see themselves as “curricularly intelligent” institutions (Leite, 2003). Thus schools are acknowledged as institutions able to set strategic plans to meet their particular needs, and teachers are able to develop their roles within an “interactive professionalism” (Fullan & Hargreaves, 1996) framework.

Alongside these ideas is what, in Portugal, was named “the territorialisation of education” (Leite, 2005). This political movement was based on the belief that assigning responsibilities to ‘local territories’ (schools, teachers and local communities) creates opportunities for an educational management to promote a curriculum that takes into account real situations and is built on the basis of “reflexivity”, therefore becoming “richer” and “stricter” (Doll, 1993).

This understanding of a school education that pays attention to real needs was also linked with political measures concerning learning assessment. Such measures advocate a concept of assessment using formative logic (Abrecht, 1991; Black & William, 2009). This concept, seen as a tool to promote learning (Dunn & Mulvenon, 2009) – and therefore a tool not only for selection but for school achievement – was influenced by discourses defending the need to develop students’ skills of involvement and responsibility (Beane, 2000). In brief, this concept assigns mandates to schools that go beyond the transmission and acquisition of discipline-based knowledge. In Portugal, the legal documents guiding the learning assessment began expressing this concept, stating as a goal:

a) To support the educative process, in order to sustain all students’ success, enabling the readjustment of school and class curricular projects, namely in what concerns to the selection of methods and resources, taking into account students’ educational needs (Normative Dispatch no. 1/2005, 5th January, item 3).

The analysis of these curricular measures and their relation with international policies, reveals that the “territorialisation of education” movement was not oblivious to the transformative challenges that had arisen in several educational systems around the world (Ball, 2001; Bolívar, 2007; Dale, 2000; Dale & Robertson, 2008; Lawn, 2000; Lopes, 2002; Meyer, 2000). As stated by Meyer (2000, p. 18), “educational curricula (and the) curricula from specific disciplines, in different nations, show patterns of a relative isomorphism and convergent change”. In the globalised world there is a strong international influence with regards to defining educational discourses and setting
homogeneous curricula (Dale & Robertson, 2008). This perspective is supported in the document *Education at a Glance 2010: OECD Indicators*, in which countries are shown how to “see themselves in the light of other countries’ performances” and provide a “comparable and up-to-date array of indicators on systems and represent the consensus of professional thinking on how to measure the current state of education internationally” (OECD, 2010, p. 1).

As an example, we can draw upon the European recommendations for education in the 21st century (Delors et al., 1996) and their impact in Portugal with regards to multiculturalism (Stoer & Cortesão, 2001). The European recommendations resulted in proposals for pedagogical diversity and processes of curricular articulation (Leite, 2002). At the same time, these proposals achieved the goals expressed in the 1990s, in the Declaration of Salamanca (1994), of an inclusive education based on the attention to students’ special needs. They also influenced teachers’ lifetime training and the assessment of schools intervention projects in Portugal.

The end of 90s and beginning of 2000 was marked in Portugal and around the world by the appearance of “hybrid” policies (Garcia Canclini, 2001; Lopes, 2005). Policies emphasising the value of place, professional development (Hargreaves & Goodson, 1996) and school autonomy in curricular management, were supplemented with “accountability” procedures (Elmore, 2003) such as teachers’ performance assessments, school assessments and the comparison of international schools’ results, as practiced in the Programme for International Student Assessment (PISA).

The characterisation of the influence of the political measures on the Portuguese educative system would not be complete without mentioning the Lisbon Strategy (2000), the technological plan for training and IT improvements in schools.

Following the introduction of these measures in Portugal – the concept of education, curriculum and schools’ and teachers’ roles – a discourse began a on school autonomy. Since the Portuguese educational system is traditionally centralised (Barroso, 1996; Formosinho, 2005), this discourse experienced some difficulties in moving from statement to action. Although the concept of school autonomy was expressed in a legal document in 1989, only in 1998 (Decree law 115 A of 1998) was it clearly stated and, in 2008, reinforced (Decree law 75), with the aim of achieving quality in public education.

The concept of autonomous schools as institutions belonging to a social community, assumed the involvement of families and other local partners and was realised through the “Full-time School” project. This project aimed to respond to the needs of working families by increasing the school day beyond the traditional five class hours. Such a social response can be seen as what some authors call the “education moral mission” (Cummings et al., 2001). This “moral mission” was also felt by teachers who began to spend more time in school and engaged in a range of new duties. To fulfill those duties, the “Curriculum Enrichment Activities” were created to be developed in extracurricular hours, ensuring a longer school day (Dispatch no. 12 590 of 2006).

Table 1 systematises political measures that have been the focus of curricular studies developed in Portugal and that have challenged schools and teachers with new duties. Those new duties have motivated the desire for training. On the other hand, as shown in chart 1, these political measures are linked with international policies by a process called “policies transfer” (Dolowitz et al., 2000) or “policies borrowing” (Ball, 2001).
Table 1 Curricular measures implemented in the Portuguese educative system between 1997 and 2008

<table>
<thead>
<tr>
<th>Political measures</th>
<th>Principles</th>
<th>International influences</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dispatch no. 484897, of 30th July - Flexible Curricular Management</td>
<td>- conception of the nationally prescribed curriculum as a project to be recontextualised by schools</td>
<td>Salamanca Declaration (1996)</td>
</tr>
<tr>
<td>Dispatch no. 9590/99, of 29th April (revoke of the Dispatch nº 4848/97)</td>
<td>- valuation of curricular management principles</td>
<td>- Lisbon Strategy, March 2000</td>
</tr>
<tr>
<td>Decree law 6/2001, of 18th January (regulating Basic education curriculum – 1st to 9th grade)</td>
<td>- conception of curriculum as a global training project</td>
<td>- Education and Training 2010 (European Council, 2000)</td>
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2. Methodological procedures

As previously stated, to answer the question posed by this paper there was a need to characterise the political measures undertaken in Portugal between 1997 and 2008. Additionally, it was necessary to collect curricular studies developed in Portugal in the same period. This collection was based on academic studies (masters and PhD theses) and books and articles published in Portuguese. These studies were chosen because they constitute privileged channels for knowledge divulgation and diffusion in the field of curriculum.

Concerning masters and PhD theses, the collection was made through an on-line search in the Portuguese National Library and in the Observatory for Science and Higher Education (OSHE). These are databases with which higher education institutions are required to be registered in order to deposit their completed theses. The studies were organised and characterised by type – Masters (M) or PhD (D) –, title and year of publication. Following this, a selection was made based on the titles, identifying the ones containing the words: curriculum, basic education, secondary education, higher education, assessment. These words were chosen because they are widely and frequently used in Portuguese literature.

The next step is the categorisation of the studies by date (see graphic 1).

Regarding the articles published in journals, the collection was based on five well known journals in Portugal in the fields of education and curriculum: 1) Revista Portuguesa da Educação; 2) Revista Sísifo; 3) Revista Educação, Sociedade & Culturas; 4) Revista de Educação; 5) Revista Portuguesa de Pedagogia. To select the appropriate articles, all indexes from every number published between 1997 and 2008 were consulted in order to identify the ones that contained in their titles the words referred to above. Similarly, for the procedure followed with the academic studies,
graphics were constructed to organise the information and enable the identification of the volume of articles published per year (see graphic 3). Concerning book publications, the search was conducted through the National Library following the same procedure described above: title registration and publication date. This procedure also informed us of the number of books published in the period between 1997 and 2008 (see graphic 3).

The final step in this process was to give us an overall view of the variety of collected publications concerning curricular studies (see graphic 4). This enabled the construction of a map on the publications’ foci and its organisation into 12 categories, namely:


The mapping enabled the identification of the volume of publications per category. Based on the mapping, two graphics were constructed (graphics 2 and 4) supporting the data analysis.

It is interesting to note that the use of maps, as in geography, was brought to comparative education by Rolland Paulston (1994) and Paulston and Lieban (2000), and seen as a useful tool for the analysis of sociopolitical organisations aiming to define models for educational systems. As stated by Stromquist (2000, p. 224), “mapping borrows some notions from geography, such as place, space and situation (…)”. According to Paulston (1994, p. 224), mapping is “a spatial tool developed specifically to enlighten the growing complexity of knowledge approaches”. Therefore it is a process of representing the knowledge produced in a certain area or domain in which the act of representation (cartography) consists in translating and interpreting that knowledge. In the case presented in this paper, the mapping enabled the systematisation of thematic foci in curricular studies (academic research, and journal and book publications) produced in Portugal between 1997 and 2008. Using this systematisation it was possible to establish relations with the political-educational contexts where they were produced.

3. Data presentation and interpretation and its relation with educational political measures

The collected studies – the focus of the analysis presented in this paper – are masters and PhD theses awarded in Portuguese Universities, and journal and book publications in Portuguese. Data concerning those studies will be presented in this section.

3.1. Masters and PhD theses

In the search for theses produced between 1997 and 2008, 820 studies were identified – 458 masters theses and 362 PhD theses. Graphic 1 shows the distribution of academic studies per year.

By analysing the distribution of studies, it is possible to see a regular production of masters over the considered period of time. However, there is a production peak in 2000 and 2001, and between 2004 and 2006. In PhDs, the publication peak is from 2006 onwards. This situation supports the need to determine whether or not there is a relation between the publication peaks and the political and curricular educational measures implemented in the previous years.

For this purpose the 12 categories listed above, identified in the mapping of general studies, were taken as a reference.

For establishing subsequent relations between the foci and political measures, the masters and PhD thesis analysis was performed concurrently. The first step comprised analysing the relation between the number of publications and their foci. After this, potential correspondences between those numbers and educational policies’ foci and measures were identified.

Graphic 2 shows the major foci in the academic studies.
By analysing graphic 2 it is possible to see that the major focus on masters and PhD theses is teachers’ training and their roles in the curriculum. A slightly lower number can be found in studies focused on curriculum and curricular management. Also significantly represented are the studies focusing on intercultural/inclusive education. School education and its relation with the family and pre-school education are the foci of a number of studies (close to the number of theses) on general aspects of school education and pedagogy. Learning assessment and ICT also show a high number of studies. The lowest number are the studies focusing on: higher education; autonomy and educational administration; special education; curricular and educational policies; and alternative training.

It is possible to establish a relation between the peaks of academic production – taking into account that 2000 and 2001 were the years with the highest number of studies – the identified foci and the educational political measures undertaken in Portugal in the years that preceded the studies.

In those years, challenges for change in educational systems were felt throughout Europe (Ball, 2001; Bolívar, 2007; Dale, 2000; Leite, 2005) and Portugal was no exception. Since 1997, with the Project for Flexible Curricula Management, schools and teachers have been challenged to undertake the recontextualisation (Bernstein, 1990) of the curriculum prescribed nationally by the Ministry of Education. This project led to the Basic Education Curricular Reorganisation and to the Secondary Education Curricular Review in 2001. As previously noted, these situations directly influenced teachers’ familiar work modes and demanded new knowledge and new learning, which led to a search for training. For instance, the requirement for all schools to have school and class curricular projects influenced teachers to search for practical and theoretical referential. Some returned to post-graduate training (masters and PhD)
and some chose continuous, on-the-job training.

Besides these technical aspects, the concept of a curriculum that accompanied the educational political measures, demanded the resources to differentiate between dynamics in curricular and pedagogical processes. It led to teachers searching for knowledge so as to be able to meet the professional challenge and it also explains the high volume of academic studies produced focusing on teachers’ parts in curriculum, curriculum/curricular management, intercultural/inclusive education, school education/pedagogy and special education. This is a demonstration of the teachers’ search for knowledge and their aim to better understand the challenges put to them. It also represents a consequence of international policies, such as: UNESCO’s *Report towards Education for the 21st Century*. The report highlights the need for educational systems to strive for equity in education. This means that “students who present different needs should be offered learning experiences that are adequate to them” (Delors et al., 1996, pp. 185-186), without neglecting the most gifted students and depriving them of adequate learning opportunities. The guidelines from UNESCO on education in the 21st century reinforced the foundations of the curricular flexibility movement, which emerged in countries such as Spain and Portugal in the second half of the 1990s. This project sought to foster curriculum development processes adequate for real situations and contexts, and to promote curricular equity and justice (Connell, 1997). The conception of an inclusive school was also influenced by the Salamanca Declaration, as well as by the recommendations given by, for example, European Agency Reports for Special Education Development.

The Lisbon Strategy, pointing towards lifelong learning and the European Report for the quality of basic and secondary education, were other great influences.

In the same time period, the Portuguese educative system witnessed the rise of a discourse concerning schools’ autonomy (Decree law 115 A/98). The autonomy discourse brought changes in schools’ governance styles that in turn required from teachers specialised training in educational management and curriculum development. This may explain the increase of academic studies registered between 2000 and 2006, focusing on schools’ autonomy and educational administration, as well as those focusing on curricular and educational policies.

Regarding PhD theses, the significant increase from 2006 may be connected with the Bologna Process and the changes that came with it (2004), especially the ones concerning teachers’ career development. The publication of the ‘statute of the teaching career’ (STC) influenced assistant teachers to quickly finish their PhDs, fearing the loss of privileges. This may explain the 41 flagged studies concerning higher education, teaching and pedagogy, when, traditionally, this level of education did not constitute a focus of study in Portugal.

Another possible explanation for the increase of PhD theses may be that, after finishing their masters degrees, some teachers expected to work in higher education and chose, therefore, to continue their training with a PhD. The European Council recommendations (2000) expressed in *Education and Training 2010 work programme*, also influenced the search for post-graduate training. Graphic 1 shows this relation of international influences.

In summary, the thesis listing constituted a successful tool for understanding the level of relations between academic production and educational and curricular policies, which is of some importance when considering the part played by research as a generator of influences in educational and curricular options.

### 3.2. Book and journal publications
As already stated, the book and journal mapping followed the same procedure used with academic studies (masters and PhDs). Thus, the procedure consisted of a joint analysis of articles published in journals and articles published in books. The choice for this approach was based on the belief that it could facilitate the understanding of possible relations between production peaks, articles foci and curricular and educational political measures. The results were organised in graphics, allowing for a general comparative representation of the publications in the considered time period (1997 to 2008), both in volume of production (graphic 3), and in most-studied subjects (graphic 4). The analysis of these data can be found below.

![Graphic 3: Total Portuguese books and articles published between 1997 and 2008.](image)

Graphic 3 shows that 909 studies were inventoried (539 books and 370 articles). It may be observed that there is an even production of articles and books over the range of the years, even though there was an increase in 1998, 2005 and 2008. The analysis aimed to answer the question: **What is the relation between the production peaks and the political context?**

Similar to the case of academic studies, the 12 categories identified in the overall academic studies mapping were also taken into account. The first step consisted in analysing the relation between the number of publications and their subjects in order to later identify possible relations between that number, the subjects and educational political measures. Graphic 4 shows the overall representation of the foci and the production volume.

The graphic shows a higher volume of article publications and a lower number of book publications.

A comparison between the volume of each type of publication and their subjects revealed that: i) the largest number of books are in the subjects of learning assessment (346) and curriculum and curricular management (84); and ii) that the largest number of articles are in the subjects of teachers’ training conception and parts (93) and higher education (44).

A close relation between the category of teachers’ training conception and parts was found. This is similar with the foci of masters and PhD theses, even though theses presented a higher number.

By establishing a relation between these publication subjects and educational and curricular policies in Portugal, it is possible to conclude that the schools external assessment policy, implemented in Portugal in 2006, exerts a considerable influence. This political measure, undertaken by the General Inspectorate for Education – a principal body of the Ministry of Education – facilitated the development of self-assessment processes that, in their turn, promoted the development and publication of studies.

Alongside are measures concerning the learning assessment that, following the principles of formative assessment, foresees the implementation of programmes for students’ recovery, monitoring and development (Dispatch no. 50/2005, of 9th November). This led schools to pay more attention to learning assessments and raised researchers’ interest in conceptualising and analysing the subject (Leite & Fernandes, 2002).

This may explain why the category of learning assessment represents the higher volume of publications (346 books and 25 articles). Although it has been a subject regularly studied over the years, there has been a change since 2005. It is also important
to consider that the number of book publications is a result of the book market’s interest in such publications, given that they are, alongside theoretical conceptualisation, a significant aid for national exam preparation for students, or support material for learning assessment instruments preparation for teachers.

Related to this aspect – and establishing another link between book and article publications and masters and PhD theses – is the policy of the Foundation for Science and Technology (a body that funds research in higher education in Portugal) regarding the definition of the priorities for granting publications in the area of Educational Sciences.

The fact that in Portugal, in the early years of the 21st century, special attention was given to issues concerning pedagogy in higher education, is connected to the number of publications focusing on higher education. The analysis of this situation – namely concerning the adequacy to the Bologna Process and its consequences in curricular organisation and pedagogical work modes – encouraged some educational and curricular researchers to publish on the subject. The significant number of books and articles concerning higher education (45/44) is representative of the interest that these subjects trigger in researchers and teachers at this level of education.

In summary, it was possible to identify a strong relation between the national and international political-educational agenda and the subjects focused on in publications, books and journals, and curricular studies (see graphic 1).

4. Final remarks

This paper, as initially stated, aimed to relate the thematic foci of curriculum studies developed in Portugal between 1997 and 2008 with political-educational measures. To do so, a characterisation of the political discourse from that time period was made. The analysis of that discourse, national and international, revealed that this period was marked by changes in the ways of conceiving education and the school curriculum – promotion of equity and inclusion (Delors et al., 1996; Leite, 2002; Stoer & Cortesão, 2001) – and teachers’ roles as curriculum developers (Leite & Fernandes, 2002, Shkedi, 2006). This justifies the assertion that these changes challenged teachers and researchers to study and produce new ideas and ways of doing things.

Recalling the starting question, the mapping of the academic studies and publications developed in Portugal over the specified time period reveals a strong relation between the thematic foci and the meanings expressed in educational and curricular policy discourses. Furthermore, the analysis shows that those meanings are expressed in the studies, and that the foci is on teachers’ training, curricular management, educational policy, intercultural education, learning assessment, higher education, among others. It also reveals that the number of studies is slightly higher after the implementation of those measures.

In addition the analysis made clear that the academic studies and publications produced in this period of time arose from international political influences that have been drawing new paths for education, both in Portugal and in Europe as a whole. This supports the thesis of the Europeanisation of education (Dale & Robertson, 2008), that is, the idea of the existence of a supranational force upon education and school curriculum, strongly influencing “not only the nature of challenges that educational systems face, but also the possibility of developing an ‘European’ response to those challenges” (Dale, 2008, p. 14). In fact, international guidelines have standardised school dynamics and teachers’ actions and influenced studies produced about them.

Nevertheless, the formulation of educational and curricular policies cannot be defined by a dichotomic approach between the global and the local. As stated by Santos
(2005, p. 7), it is important to defend a counter-hegemonic globalisation “against the economical, social and political consequences of the hegemonic globalization”. Therefore, Ball (2001, p. 101) is also supported when he warns that the “analysis of flow and policies influence among nations, in particular, needs to be carefully handled” assuming that globalisation reaches the local context without annihilating it. In fact, the opposite occurs. Globalisation provokes the emergence of forms of identity and cultural representations, even when connected with the globalisation process (Giddens, 1996). It is this contention that is the basis of the study presented in this paper.

Notes

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3 The “Publication of Education and Training 2010” was launched by the OECD in 1996 and since then it has become an annual publication. It is part of the work programme for the OECD Education Committee and is a response to the priority policies established by the OECD Ministers of Education in OCDE (2003, p. 2).

References


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