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Curriculum policy in Portugal (1995–2007): global agendas and regional and national reconfigurations

ANTÓNIO TEODORO and ELSA ESTRELA

This paper undertakes a critical analysis of recent education and curriculum policies in Portugal, focusing on the relationship between globalization, international agencies, and the curriculum. It aims to highlight not only changes in the organization of schools, but also the setting of an agenda structured at a global level for education in which the ability of supranational and transnational institutional forces to cross or go beyond national borders and the configuration of relationships between nations are all implicit. The paper contends that education and curriculum policies should be understood as a product of multiple influences and interdependencies; they are the result of a process of *bricolage* which reveals the interests, values, principles, and rules that, at any given moment, are dominant or not. Drawing upon this approach, the aim is to show, on the one hand, how the results of the large OECD research projects influence educational and curriculum policy-making in Portugal, and, on the other hand, how these policies are affected by the 'Europeanization' process.

Keywords: curriculum policies; Europeanization; globalization; governance; recontextualization.

We undertake herein a critical analysis of recent educational and curriculum policies in Portugal, focusing on the relationship between globalization, international agencies, and the curriculum. We aim to highlight not only changes in the organization of schools, but also the setting of an agenda that is structured at a global level in which supranational and transnational institutional forces cross, or go beyond, national borders and, at the same time, reconstruct the relationships between nations (Dale 1999, 2001). These supranational forces do not intend *a priori* to replace the state. However, they affect national education policies and practices in different ways and to different degrees, as their effects are mediated at a local level.

We draw attention to the idea that educational and curriculum policies should be understood as a product of multiple influences and interdependencies, the outcome of a process of *bricolage* (Ball 1994) which reveals the interests, values, principles, and rules that, at any given moment, are (or are

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not) dominant (Pacheco 2002). Drawing upon this approach, we aim to show, on the one hand, how the results of the large-scale Organization for Economic Co-operation and Development (OECD) research projects have influenced educational and curriculum policy-making in Portugal, and, on the other hand, how these policies are affected by 'Europeanization' processes.

In our critical analysis of education and curriculum policies in the period 1995–2007, we aim to describe the effects and implications that the results of the OECD surveys—namely PISA—have had in the case of Portugal. In addition, we look at how the European Union's (EU) guidance of education policies has affected Portuguese curriculum policies over the last 12 years.

Modes of governance and regulation of education policies

The growth of education is considered to be a global phenomenon developed through 'isomorphism' across almost all regions of the world. Although 'education' or schooling has local roots—it was a model constructed in a European context—it has gradually become universal as different regions have been integrated into the capitalist world economy. This school model became not only universal, but also virtually 'the only one possible or even conceivable' (Nóvoa 1995), and it is strongly linked to the formation of the modern state.

The internationalization of educational problems began to be more evident after a system of international intergovernmental organizations appeared, both within the UN and within financial or economic co-operation contexts—the International Monetary Fund (IMF), the World Bank (WB), and OECD. The initiatives undertaken by such international organizations create vast networks, developed on the basis of a concept of comparative education and centred on four main topics: the ideology of 'progress'; a particular concept of science; an idea of the nation-state; and the definition of a comparative methodology (Nóvoa 1995: 22–24).

Created as an organization devoted to economic co-operation and development in Europe, OECD assigned a prominent place to education and training in its activity, a priority that was reinforced in 2002 with the creation of a department for this area.¹ In this context, OECD has supported its members with surveys and indicators that provide grounds for an international comparison of all aspects of education systems:

The monitoring of progress and experimentation in systems of education depends heavily on indicators that enable government authorities and other interested groups to judge the context and functioning of education and the results achieved. Education indicators can reveal some of the most critical weaknesses of education systems, and can aid the design of corrective policy. (OECD/CERI 1993: 10)

OECD studies focus on the formulation of indicators and the subsequent data collection at a national level. The impact these studies have had on 'industrialized' or 'developed' countries is particularly relevant. The annual OECD publication *Education at a Glance* (OECD/CERI 1992) has become the best-known public expression of these projects, involving four categories of national indicators and also a set of new indicators prioritized

in the process of national educational policy-making.² Not only do these sets of indicators provide member countries with relevant comparative information, but they also contribute to determining future priorities in that they constitute a global agenda for reforms to be implemented in the near future or for the ongoing reforms in the education systems of the different countries involved.

Equally significant is the PISA project, launched by the OECD in 1997. The results from PISA allow for regular monitoring of educational systems in terms of pupils' performance on the basis of an internationally accepted conceptual framework.³ The project initially involved OECD member countries only; however, in the last data collection, in 2006, 57 countries were involved, 27 of which were not OECD members, which indicates the influence of PISA results on national policies of countries that do not belong to this organization but want to participate in a comparative survey.

PISA focus on numeracy and literacy is related to their relevance for life-long learning—a crucial issue for the OECD. According to the OECD, PISA presents:

an innovative approach to life-long learning, which does not limit PISA to assessing pupils' curricular and cross-curricular competencies but also asks them to report on their own motivation to learn, their beliefs about themselves and their learning strategies. (OECD/PISA 2004: 40)

What is expected from PISA is that policy-makers are provided with useful information that may contribute to educational success, emphasizing the idea of efficiency. Equity is also on the PISA's list of priorities.

Teodoro (2003; see also Dale 2001) has argued that, in the globalization project, large-scale international projects serve as levers with which to set an agenda for education at a global level.⁴ In particular, OECD's use of indicators for education as a tool to evaluate national education systems leads to the formation of a global rationalization, as well as imposing comparability and a new consensus in education policies (Teodoro 2009).

Educational policy-making in peripheral or semi-peripheral countries of the modern world-system has begun to depend more and more on the legitimization and technical support of other organizations. Surveys like PISA play a fundamental role in normalizing national education policies (Teodoro 2003), since they set an 'agenda' that establishes not only the priorities, but also how problems should be thought about and solved, which constitutes a way of establishing a 'mandate'.⁵

Underlying the global development project (or globalization),⁶ there is a new concept of development, qualified as 'sustainable', which brings back to the fore the theory of human capital. Dale (2001) argues that the most visible effects of globalization on education policies result from the re-organization of states' priorities in order to become more competitive and attract the investment of transnational corporations. However, Dale underlines that although globalization may change the direction and the parameters of national education policies, it does not necessarily override national particularities. It is a result of a supranational construction and not of an imposition of one state over another. On the other hand, the effects of globalization are indirect given the different position of each nation within the world order.

Drawing upon recent studies on international political economy,⁷ Dale (1999, 2001) shows that the current changes and trends in education systems may be analysed as being part of an agenda for education set at a global level—which implies the action of economic forces at a supra- and trans-national level to overcome or go beyond national borders, and, simultaneously, depicts the relationships between countries.⁸ These supranational forces do not intend to replace the state. However, they do affect national education policies and practices in different ways and to different degrees in different states; their effects are always mediated by the local.

In the hypothesis that there is an agenda for education being set at a global level, the main argument is based on how issues in state agendas—giving support to capital accumulation processes, favouring a context that does not inhibit the continuous expansion and legitimization of the system and the role of the state—are analysed and prioritized. This argument needs to take into consideration that these issues are regulated by tensions and pressures existing in global relationships (mainly in the economy–polity)—which limit the range of options the state may have in respect to its political orientation. In the global era, these issues have become central both at global and at national level, and this inevitably implies direct and possibly contradictory consequences at different levels (Dale 2001).

However, although there is no doubt that these are issues influencing the agenda for education, they are not the only ones. The social dynamics of civil society also exert strong pressure upon state education policies:

[The] dynamics inside institutional sectors such as education are the consequence of complex articulations of interests that emerge from civil society and the economy, and that build up, maintain, and limit state power. (Robertson and Dale 2001: 122)

On the other hand, the transnationalization of education can be seen as a form of 'low-intensity globalization' (Santos 2001, Teodoro 2003): in part because large-scale data-based research projects have an indirect influence on national education policies; and also because of the relationship established between international organizations and the formulation of these policies.⁹ The centre of educational governance remains largely under the control of states, although it is possible to identify new reconfigurations. However, the way regulation works is now deeply influenced by supranational forces as well as by political–economic forces.

We are, in other words, facing a new governance paradigm for education: there is a change in the role of the state at the national level as the international level directly affects education systems and education policies (Dale 2001). In those countries occupying central positions in the world education economy these effects are noticeable through the setting of a global agenda; in peripheral countries they function as more or less explicit mandates in the definition of education policies.

The changing role of the state corresponds to the concept of the 'competitive state', a process whereby state and market actors are pursuing the reinvention of the state as if it were 'an organization almost similar to an enterprise in the world context' (Cerny 1997: 251). That is, the state political agenda is guided by practices of competitiveness and by the implementation of a

market logic, both used simultaneously to legitimize the same agenda within and beyond national borders (Roberston and Dale 2001).

On the other hand, and as Meyer (1997) points out, there is a world-wide common culture that sees the development of a national educational system as built on the basis of universal models of education, the state, and the nation. This means that the institutions of the nation-state, and the state itself, are shaped by standards, ideologies, and universal common values. Meyer (2007: 261) has defined globalization as the ‘rise of consciousness of a world society and world standards about what a national or a local society should be like’. In this description, underlining the value of cultural and institutional explanations, two conclusions emerge: (1) the great influence of world models on national and local policies and forms, which means that ‘changes in the dominant world models produce changes in national ones’; and (2) that ‘world models stress the importance of good citizenship in world society, leading nations to at least posture as virtuous by global standards’ (Meyer 2007: 263–264).

This globalized world culture is seen as being produced by science, rationality, and the conception of human rights—which are, in turn, seen as created in and installed in individuals by way of formal education. This explanation sustains the theory about the spread of educational systems by isomorphism, through processes of cultural diffusion.

In contrast, and simultaneous to this globalization movement, there is a movement in an opposing direction within states themselves—characterized by attributing value to the ‘local’—that has significant consequences for education and administration policies. This movement may be observed when we consider the appearance of emergent forms of territorialization in education policies, the redefinition of the role of the state (i.e. assuming an essentially regulatory function), the share of power between central and local administrations and schools, the emergence of peripheral powers, the mobilization of local actors, and the contextualization of political action.

These two simultaneous movements—the global and the local—result from the possibility of a policy reconfiguration, a number of processes and practices used by the state to organize knowledge in order to re-order what can be with what should be (Bernstein 1990, 2001). Under this pressure, the crisis of Educator State has resulted in a shift in the focus of education policies: schools have become the meeting point of all the transnational, national, regional, and local influences transmitted by multiple complex and interdependent decision systems.

Portugal, a European semi-peripheral country in the modern world where the crisis of mass education and its consolidation (Stoer and Araçjo 2000) is occurring at the same time, has experienced education policies continuously affected by the intervention of international organizations. The studies and publications conducted by these organizations have played a role of *normalization* within the national education policies by setting an *agenda* that not only orders priorities but also defines the ways problems are to be faced, thereby establishing a *mandate* (Teodoro 2003).

Thus, the integration of Portugal into the EU in 1986 implied a new mandate for education, which acquired concrete form in what Teodoro (2001: 13) described as ‘the emergence of a political discourse of educational

priorities'. Such a discourse differed from the discourse in the first half of the 1970s when the democratization of education was presented as the major goal of education policies. In contrast the present-day emphasis is put on the need to adjust the education system to the needs of economic modernization, in particular through upgrading the qualifications and training of human resources (Teodoro 2001).

It is at the EU level that we observe a convergence taking place in the negotiation of economic, social, education, and life-long learning policies, and giving rise to a supranational macro-regulation. With respect to education and curricular policies, this convergence process has been translated into the recovery of a technical vision of education, based on models of rational techniques, on the production metaphor, and on social re-engineering models; a re-centralization of school practices; and a decentralization of discourses (Pacheco 2007). According to Pacheco (2007), when globalization is positioned next to economic utilitarianism,

it creates and enlarges the mechanisms that produce single and homogenous schooling in terms of learning, with content selected to produce a qualified labour force that is flexible to the eventualities of a certain social order. (p. 162)

As Dale (2008) claims, we are facing the creation of an 'European education space'; the new architecture of education policy-making is producing guidelines and goals that the member-states accept on a voluntary basis. A follow-up in each country is later made on the basis of the indicators that have been established to measure the results.¹⁰

Today, we are facing 'the formal and explicit constitution of a supranational governance level as a *locus* for policies to be developed for education and training systems' (Antunes 2005: 129). This, through the 'Open method of co-ordination' (OMC), does not imply imposition but rather political commitments between states that, in relation to defined policies, have their executive autonomy respected, although they are subject to explicit control by the bodies that define the policies.

OECD is set up to be, and is recognized as being, a think-tank in the field of education. However, over the last decade we can observe the 'Europeanization' process that attempts to affect national education policies, and from which new governance models have emerged. These models exclude actors and interests that belong to educational contexts not only from the policy-making processes but also from the assessment of the enacted policies, therefore reinforcing a technocratic conceptual approach to education. Portugal is positioned at a platform where, as its education policies are defined, the influences of international organizations intersect and overlap. Their mandates are not antagonistic. Instead, they complement one other.

Global agendas and regional reconfigurations

Robertson (2006) contends that education systems have been subjected to significant changes as a consequence of the increasing competitiveness of the global economy and a reconceptualization of the role of education in the developed and developing world. The result has been a transformation in

the mandate and the governance of school systems. The new mandate for education is grounded not only in the theory of human capital but also in the neo-liberalism (i.e. economic competitiveness, life-long learning, and investment in knowledge producers). The main ideas modelling governance are choice, diversity, and the marketplace, with an emphasis on involving new actors from the public and private sectors.

New forms of governance are emerging at three levels: global, regional, and local. They share the tendencies mentioned above, suggesting a close relationship between education and the economy. Indeed, the regulation and the definitions of valid school knowledge is shared and the forms of regulation are distributed across levels as benchmarking systems and other means of assessment (for example, the EU benchmarks and PISA), involving old and new actors, emerge.¹¹

As we have indicated, OECD and EU are the primary organizations that have built the contemporary educational agenda at a supranational or global level and at a regional level.

OECD

As we see it, OECD sets an agenda for education based on an understanding of knowledge that is structured on the basis of its values and objectives. All the work and the projects developed by OECD are intended to define new ways of conceiving knowledge, working knowledge, and using knowledge, which will lead to new schools, schooling, and forms of teacher work (Robertson 2007):

OECD science, technology and industry policies should be formulated to maximize performance and well-being in ‘knowledge-based economies’—economies which are directly based on the production, distribution and use of knowledge and information. (OECD 1996: 7)

Knowledge that is transferable and segmented into skills constitutes the production centre of a type of capitalism that is experiencing a process of change. Knowledge is privileged in a new model of developing human capital that is seen to dominate the ways in which knowledge is produced, mediated, and used.¹² The construction of a new ‘information society’ is based on the transfer of codified knowledge through distribution networks, and of skills that allow individuals to develop and increase knowledge and adjust themselves to new forms of production:

Knowledge is increasingly being codified and transmitted through computer and communications networks in the emerging ‘information society’. Also required is tacit knowledge, including the skills to use and adapt codified knowledge, which underlines the importance of continuous learning by individuals and firms. In the knowledge-based economy, innovation is driven by the interaction of producers and users in the exchange of both codified and tacit knowledge; this interactive model has replaced the traditional linear model of innovation. (OECD 1996: 7)

Drawing upon this conceptualization, education systems should prepare individuals who can contribute to economic growth. Schooling, its

organization, methods, and contents, are subject to change. For example, in OECD's (1996) *The Knowledge-Based Economy* four types of knowledge are identified: *know-what*, *know-why*, *know-how*, and *know-who*; 'know-how' and 'know-who' correspond to 'tacit knowledge', which is difficult to codify, share, and measure. For this reason, formal school learning should focus on 'know-what' and 'know-why' which allow for having information made available and take into account that which may be measured.

OECD's (OECD/CERI 2004) document *The Schooling Scenarios* outlines six scenarios for the schooling of the future. The scenario called 'De-schooling: Learning networks and network society' is appropriate for the concept of knowledge found in OECD's conception of the knowledge-based society. This scenario is characterized by a de-institutionalization of education systems: schools are terminals of networks under the control of an external body that imposes codified, homogeneous, and hegemonic knowledge. Furthermore, there is an increase in home-schooling systems.

Within this framework, the establishment of indicators is needed to compare and assess the results of each OECD member-country's education policies.¹³ The indicators are measurement units used to analyse the performance of economic systems.¹⁴ In the 1990s, we found indicators centred on *outputs*, in contrast to the indicators used in the previous decade and focused on *inputs*. In the 1990s, indicators refer to organizational contexts, life-long learning, and the transition from schooling to working life. At the beginning of the 21st century, the indicators are related to education performance, quality of outcomes, educational provision, equity, and efficiency in resources management.

Table 1¹⁵ outlines the changes in the thematic chapters of *Education at a Glance*, OECD's annual statistical compendium, between 1996–2007. The indicators being presented have undergone a process of normalization in the last 6 years. That is, the selected indicators are centred around the following five themes measuring outcomes: access to education; participation and progress; the learning environment and school management; human and financial resources invested in education; institutional results and the impact of knowledge. In the second half of the 1990s the indicators were related to context and costs; the market/society relationship; equity; and results. At the beginning of the new millennium they were related to context, costs, and results.

It is in this context that we need to see OECD's PISA project. Its results may be used by the participating national governments as a working tool in the definition and redirection of education policies in order to prepare young people for their future life. On the three occasions that data was collected, the focus was on 'literacy', taking into consideration different areas: reading; mathematics; problem-solving; and science.¹⁶ The results of the first two data collections show that, in general, Portuguese pupils' average scores are lower than the average in the OECD. In comparative terms, we highlight the following results relating to the Portuguese students:

- When students were given narrative texts to read, their attainment was generally high, considering the OECD average scores;

Table 1. Thematic indicators used in *Education at a Glance* (1995–2007).

Thematic indicators	1995	1996	1997	1998	2000	2001	2002	2003	2004	2005	2006	2007
Cost, resources, and school processes	X											
Results of education	X											
Context of education	X				X	X						
Individual, social, and labour market outcomes of education					X	X						
Learning outcomes of education						X						
The transition from school to work				X								
Demographic, social, and economic context of education		X	X	X								
Costs of education and human and financial resources		X										
Graduate output of educational institutions		X										
Student achievement and adult literacy		X										
Labour market outcomes of education		X										
School environment and school/classroom processes		X	X				X	X	X	X	X	X
Access to education, participation, and progression		X	X	X	X	X	X	X	X	X	X	X
The learning environment and organization of schools			X	X	X	X	X	X	X	X	X	X
Financial and human resources invested in education			X	X	X	X	X	X	X	X	X	X
Output of educational institutions and the impact of learning							X	X	X	X	X	X
Student achievement			X									
Student achievement and the social and labour-market outcomes of education				X								
Social and labour market outcomes of education			X									

- Scores were more negative when reading-comprehension required both rigorous localization of information in the text and reflexive inference about the text format, for which previous knowledge is needed;
- It is assumed that reading habits and teaching methods for reading skills training may have an impact on the disparities (whether positive or negative) between Portuguese students and the other students from other countries;
- With respect to mathematical literacy, scores were lower when the level of reflection required was higher, the concepts needed were more abstract, or when problem-solving processes required combining various sorts of information;
- About 33% of the students attained a proficiency grade below 1 in mathematical literacy and about 25% did not attained grade 1 in problem-solving tests;
- There was a significant difference between the personal profiles of students whose literacy scores were high and those whose literacy scores were low, in respect to learning strategies, effort and persistence, self-image, sense of efficacy, and sense of belonging and motivation;
- School grades were strongly correlated to the mean scores. The average performance of year 10 and year 11 students was above the average for OECD countries, but lower for each school year below year 10;
- In the first data collection, it was possible to note the existence of regional heterogeneity in relation to students' average performance; and
- It seems that there is not a significant relation between what it is assessed at school and the skills assessed in the reading literacy tests. The same does not occur in relation to mathematics; there would seem to be a relative similarity between the assessed learning components and the work of the schools. (See OECD/PISA 2004)

In general, the surveys indicate that there is a positive correlation between the average performance of students in each country, national income, and national public expenditure on education per student (Afonso and St. Aubyn 2005, 2006). Moreover, the surveys point to differences between the family profiles of students who achieved high and low literacy scores, demonstrating that family background is significant to students' learning.

In addition to the comparative findings, the PISA reports include recommendations to the participating countries. PISA has recommended that the Portuguese education system should:

- Develop awareness of different learning strategies, and environments in which students perceive themselves to be part of the institution;
- Promote the acquisition of basic competences for solving simple tasks in which previously learned strategies are to be applied as well as the acquisition of skills to solve problems closer to real-life situations;
- Draw more often on higher-level cognitive processes in problem-solving situations that call for the simultaneous use of various sources of information and complex concepts, and develop the ability to assess

the quality of the information provided as well as to produce valid arguments; and

- Develop measures that might overcome regional heterogeneity and work to eliminate the differences between the relative achievement of year 10 and 11 students and years 5–9 students.

The European Union

The development of an agenda for education within the European space has been made possible through the EU. Since the Treaty of Maastricht, the EU has underlined the need for an education policy that answers the needs of a competitive economy. In other words, there has been a change from previous policies in training and education that aimed only at supporting and contributing to member-states' development of action agendas, towards policies providing more and more explicit guidelines for policies that are specified and defined at the supranational level (Antunes 2005).

The last years of the 1990s—with its slogan 'reinforced co-operation'—were particularly important because of the initiatives developed during that time.¹⁷ In March 2000, the European Council held a special meeting of the EU member-states in Lisbon to discuss the 'knowledge and information society'. This historic meeting, later known as the Lisbon Summit, launched the rationale for and the strategic direction of EU progress and sustainable development in the first decade of the 21st century. Within this Lisbon strategy, the main goal was for Europe to become the most competitive and dynamic knowledge-based economy by 2010. In order to achieve this goal, three collateral objectives were proposed: to ensure a sustainable economic growth; more and better jobs; and greater social cohesion (Conselho Europeu de Lisboa 2000).

In terms of action, three fundamental strands were selected—education, initial and life-long training, and professional qualifications—in order to produce a more productive and competitive labour-force. The need to ensure that all citizens have access to education and life-long training was reinforced through, in particular, investment in new skills training.

Within this context, the 'Education and Training 2010' programme underlined the importance of information and communication technology, a technological culture, foreign languages (in particular, English), entrepreneurship, and social skills. To implement this programme, expert groups were formed to design 'Programmes of Specialized Qualified Professions', among which we may highlight a working group chartered to focus on the 'key competences' needed for life-long training. This expert group had as its objectives the identification and definition of the 'new competences', to decide how these could be better integrated into curricula and then maintained and learned throughout life.

One year later, in 2001, following the guidelines of the 'Education and Training 2010' programme, the 'experts' presented the report *Concrete Future Objectives of Education and Training Systems* (Council of the European Union 2001) defining as strategic objectives the quality, access, and openness of education and training systems. In 2002, a Work Programme aimed

at implementing these strategic objectives was launched by the European Council. This document clarifies and identifies the following to be the 'key competences':

- Literacy and numeracy (foundation skills);
- Competences in mathematics, science, and technology;
- ICT skills and use of technology;
- Learning to learn;
- Social skills;
- Entrepreneurship; and
- General culture.

To achieve these objectives priority areas of intervention were outlined: strategies to innovate and improve the 'basic skills'; digital literacy; foreign languages; and the inclusion of the European dimension in the curricula (Council of European Union 2002).¹⁸

In 2004, an intermediate report on the implementation of the 'Education and Training 2010' programme was submitted to the European Commission (European Commission 2004). On the basis of the indicators used in this follow-up report, the need to include the European dimension in member-states' education and training systems, beyond the dimension of national policies, was reiterated. In particular, recommendations were made to reinforce the European dimension by the working group on the 'key competences'.

Another important conclusion in this intermediate report was the reference made to the shift of focus in education to learning and the need for acquiring broader competences in order to succeed in learning—not only during the period of schooling but throughout life. The group of experts on the 'key competences' then broadened the concept and the scope of their work, replacing the notion of 'key competences for the XXI century' with the broader and more global notion of key competences for the life-long learning that would be fundamental to the knowledge and information society (European Commission 2004). The competences should form part of the three parallel 'strands' of *Personal fulfilment* (i.e. the notion of cultural capital); *Citizenship and social inclusion* (i.e. the notion of social capital); and *Employability* (i.e. the notion of human capital). The 'key competences' are to be understood as a 'reference tool' for national policies to create learning opportunities for all citizens throughout life in education and training contexts.

The concept of a 'key competence' is defined as a set of knowledge, skills, and attitudes. Moreover, the 'key competences' should be transferable and multifunctional, and include motivation and the disposition towards learning as well as know-how. This promotes and implies different notions:

- Knowledge transfer (from the learning context to the actual performance context);
- Drawing on knowledge in context (know-how);
- Functional knowledge (useful knowledge and social relevance);
- Multi-disciplinarity (combining different knowledge and different perspectives on reality); and

- Life-long learning (autonomy and willingness to go through new learning processes, according to different needs and professional and personal motivations).

The eight ‘key competences’ established for life-long learning are: (1) communication in the mother tongue; (2) communication in a foreign language; (3) mathematical literacy and basic competences in science and technology; (4) digital competence; (5) learning to learn; (6) interpersonal and civic competences; (7) entrepreneurship; and (8) cultural expression. These ‘key competences’ may be adapted to different cultural, linguistic, social, and contextual specificities, but they should be acquired by the end of compulsory schooling. They should act as a foundation for further learning and form part of a life-long learning.

These objectives, as well as the established indicators, have been amended since 2002. They are aimed at assessing the EU member-states’ education systems, taking into account the strategic guidelines outlined in the Lisbon Strategy. As a complement, benchmarks were also set for the first time in 2002 indicating targets to be achieved by 2010:

- (1) All member-states should at least halve the rate of early school-leavers, with reference to the rate recorded in the year 2000 in order to achieve an EU-average rate of 10% or less.
- (2) All member-states should have at least halved the gender imbalance among graduates in mathematics, science, and technology while securing an overall significant increase of the total number of graduates compared to the year 2000.
- (3) The member-states should ensure that the percentage of 25–64-year-olds in the EU with at least an upper-secondary education reaches 80% or more.
- (4) The percentage of low-achieving 15-year-olds in reading, mathematics, and scientific literacy will be at least halved in each member-state.
- (5) The level of participation in EU member-states in life-long learning should reach at least 15% of the adult working-age population (25–64 age group) and in no member-states should it be lower than 10%.¹⁹

The 2005 European Commission follow-up report on the progress made vis-à-vis these benchmarks pointed out that some goals, such as reducing the percentage of early school-leavers and the percentage of low-achieving 15-year-olds, would be difficult to achieve by 2010. However, in respect to benchmarks 2, 3, and 5, the report indicated that the results were getting closer, at faster or slower rates, to the benchmarks. In the case of Portugal, progress had been made with respect to gender balance among graduates, but with respect to the other benchmarks the level of achievement was still a long way from the goals.

Curriculum policies in Portugal (1995–2007): national implications and reconfigurations

Education policies may be understood as an authoritative determination of values; they represent a prescriptive, operational, and intentional rhetoric

and they bring together a complex and heterogeneous set of crucial elements. They should be understood as a 'system' or a 'culture' in that they cannot be taken as simply isolated facts related to administration. They are, in Ball's (1994) words, 'normative texts'.

Policies include contradictions, omissions, and concepts and terms that produce different effects. From the moment they are conceived until the moment they are 'implemented', there are multiple filters determining their intended trajectory, and adding up to various understandings. *Meaning-production depends on the contexts of reception.*

In this sense, the concept of conflict is crucial in the study of education policies—specifically, the conflict resulting from the pressures on decision-making actors. Education is a field significantly affected by intersections of political choices that follow very different logics of power (Pacheco 2002). According to Lima and Afonso (2002: 8):

education policies in Portugal ... have been proposed, debated, and enacted in a new context shaped by the production of universal ideologies, though such ideologies are often just peculiarities reproduced on a world scale; that is, they are *globalized localisms*.

As in other nations, education in Portugal is going through a crisis linked to a change in the values, rules, and aims that constitute the basis for the implementation of 'education for all'. We could say that education is experiencing a double crisis: on the one hand, a *regulation* crisis, because it does not fulfil its social integration role efficiently; on the other hand, an *emancipatory* crisis, since it does not produce the desired (and desirable) social mobility across socio-economic strata (Teodoro 1997).

Both the reinforcement of the national curriculum and the control of learning results have been the focus of Portuguese curriculum policies over the last 12 years. This has been made legitimate by, on the one hand, the concept of knowledge as information-capital that follows the principle of 'optimization of performances' (Lyotard 2006),²⁰ and, on the other hand, by a market ideology evident in the establishment of a curricular culture of reporting results (Pacheco 2007).

Magalhães and Stoer (2002) argue that the gap between Portuguese political discourse and pedagogical discourse has become wider, demonstrating 'the rhetorical nature of the mass education in Portugal' (Stoer 1986). In the period between 1974–2000, we can observe that the gap between these two discourses progressively widened as a consequence of divergent mandates for schooling. In the period immediately after the end of the dictatorship, there was a harmony between the political discourse and the pedagogical discourse in that both discourses conceived education as part of the revolutionary programme. As Portugal integrated into the international discourse of labour, the discourses began to diverge. *Political* discourse began to focus on the normalization of processes and structures, and on the renaissance of meritocratic schooling based on the principle of equal access to education. *Pedagogical* discourse, on the other hand, stood for the promotion of democratic schooling based on the principle of equal opportunities to succeed. In the 1980s, the gap became wider: political discourse underlined the economic relevance of education; pedagogical

discourse sought to keep education relatively autonomous from economic needs.

In the 1990s, two periods may be distinguished: in the first half of the decade the political discourse reinforced the benefits of an entrepreneurial education while pedagogues drew attention to the dangers of the ‘neo-Taylorism’, emphasizing teachers’ agency as a means to overcome instrumental pedagogy. In the second half of the decade, while the political discourse underlined a concern for performance, putting emphasis on the idea of education as a public service, pedagogical discourse proposed social inclusion and the idea of inclusive education. In the second half of the 1990s, the result was ‘hybrid education policies’, a simultaneous concern and ignorance about the increasingly wider gap between political discourse and pedagogical discourse.

Between 1995–2002, when the Socialist Party (PS) was in power, the concept of ‘top-down’ reform was abandoned. Instead, local innovation and a gradual change in schools were valued. This reinforced the participation of all players in the process of policy-making for public education. However, despite insistence on the principles of equality, equity, and inclusion, strong references to development and education prevailed, setting up a logic of homogenization and universal modernization (Teodoro and Aníbal 2008).

As an example of these hybrid education policies, national testing entered compulsory schooling—within the same legal normative framework that formative assessment had previously been introduced as the main mode of evaluation. In fact, the presence of formative assessment should be understood as a sign of the state’s intention to implement the ‘consolidation of mass schooling’, while the introduction of national examinations may be explained as a consequence of the realization that there was a ‘simultaneous crisis’ in that schooling model. The difference, and contradiction, between these two modes of evaluation reflects the tension in Portugal between democratic and meritocratic schooling. This tension increased along with the needs of the accumulation process derived from the neo-liberal agenda and the globalization process (Afonso 2002).

In the context of the politics of reporting and monitoring results, we note the significant use of terminology related to competences (‘core’, ‘specific’, ‘methodological’, ‘cross-disciplinary’) in the Portuguese official documents produced for the *Reorganização Curricular do Ensino Básico* (Re-organization of the compulsory school curriculum). In these documents, although the curriculum appeared within a constructivist conceptual framework promoting reflexive and emancipatory learning, ‘competences’ were articulated together with the ‘market demands’ (Stoer and Magalhães 2005: 47). This implies a more restricted concept of knowledge and a more pragmatic approach to learning, the attribution of value to specific disciplinary areas, and a resort to technical orientations related to a utilitarian view of education (Pacheco 2007).

Between 2002–2004, while the centre-right government (PSD+PP) was in power, we observe discourses that value regulation based on results. Thus, it was argued that there was a need for school rankings within compulsory schooling, produced through external assessment (introduced in 2005). During this period, discourses underlining a constructivist approach to the

curriculum were abandoned, and measures were undertaken discrediting the conceptual framework and rationale that the previous government had drawn up in respect to curriculum management. The focus was on 'a liberal viewpoint based on a logic of individualism, emulation and competitiveness' (Lima 2003: 39).

The following government, beginning in 2005 and headed by the Socialist Party, is characterized by a discourse that moves in two directions: on the one hand, it promotes public education as a factor of social justice, social mobility, and the promotion of equal opportunities; on the other hand, it seeks control of the educational system by way of the external assessment of schools and teachers (Teodoro and Aníbal 2008). This second direction is strongly linked to the concept of *rationalization*: external assessment serves the purpose of human and material resources management based on excellence. Table 2 highlights the main measures undertaken by the different governments.

Drawing on table 2, we consider the following issues: (1) curriculum design and management; (2) assessment of school results; and (3) decentralization. In relation to *curriculum design and management*, there was, at the end of the 1990s, an attempt to give more autonomy to schools in terms of curriculum. However, in the following periods, such autonomy was progressively removed²¹ with the emergence of an administrative control of the curriculum. Such control has become stronger at all levels, but mainly in primary education where teachers used to have more freedom to manage the curriculum according to their pupils' needs.

On the other hand, the concept of a curriculum based on competences points to a more pragmatic approach to knowledge and to utilitarian understanding of schooling (Pacheco 2007; see also Magalhães and Stoer 2002). Competences pass through the individual, giving him or her capacities to respond to situations and questions, but do not bring change—they do not bear on the training of the self. Pacheco (2007) and Magalhães and Stoer (2002) see the emergence of this 'new' concept as associated with performance, the need to measure educational results, and the needs of a new middle class (Bernstein 1977) to dominate the new forms of work, e.g. 'programmed work' (Castells 1996).

On the other hand, Roldão (2005) takes competences to be components of an integrated construction of knowledge, based on: (i) *use*, as mobilization, (ii) *integration*, with many kinds of knowledge, and (iii) *context*, because knowledge can be transferred from one setting to another. Within this point of view, 'competence' is a significant idea because it offers ways of thinking about the use and management of several forms of knowledge.

With respect to *assessment*, we note the emergence of a culture that values assessment based on national testing and an assessment of schools and teachers, mainly centring on rates of 'poor' educational attainment and the numbers of school-leavers. According to Pacheco (2007), we face a concept of education as an added value that can be managed according to scientific methodologies legitimized by the market ideology.

In relation to *decentralization*, which may be understood both at the curricular level and at the school management and organization levels, the process of decentralization is based on school autonomy, above all at the pedagogical

Table 2. Major education and curriculum measures undertaken according to government cycles (1995–2007).

Period	Government	Education policy measures	Curriculum policy measures
1995–2002	Socialist Party (PS)	<ul style="list-style-type: none"> • Creation of education regions for priority intervention • Consolidation of school autonomy and development of new forms of school administration and management • Creation of groups of educational institutions • Negotiated revision of the Employment Statute for Educational Professionals 	<ul style="list-style-type: none"> • Flexible management of curriculum project • Re-organization of the compulsory schooling curriculum • Definition of the national curriculum based on competences • Introduction of non-disciplinary curricular areas • Compulsory second foreign language • Re-organization of teaching time. • Pre-eminence given to formative assessment • Introduction of national examinations • Creation of alternative learning routes in compulsory schooling (alternative curricula/courses 15–18) • Creation of National System of Recognition, Validation and Certification of Competences (RVCC)
2002–2004	PSD (Social Democratic Party) + PP (Popular Party)	<ul style="list-style-type: none"> • Organic Act of the Ministry of Education • Publication of schools ranking based on the results of external assessment 	<ul style="list-style-type: none"> • Reform of secondary education • Creation of technological courses in secondary education • Introduction of national examinations in the last year of compulsory schooling (Portuguese language; mathematics)

Table 2. *(Continued)*.

Period	Government	Education policy measures	Curriculum policy measures
2005–2007	Socialist Party (PS)	<ul style="list-style-type: none"> • Revision of the Employment Statute of Educational Professionals • Technological plan • Formulation of contracts for school autonomy • Lifelong training programme for mathematics • Portuguese Language National Programme • Programme of Study of Experimental Science • Increment of social benefits for secondary school pupils • Reorganization of the schools network • Change in the law on assessment of textbooks 	<ul style="list-style-type: none"> • Reinforcement of youth training/qualifications • Introduction of ICT as a subject in years 9 and 10 • Introduction of ICT as part of the non-compulsory curricular areas in year 8 and its removal from year 10 • Full-time School Programme • Introduction of a foreign language in primary education (year 4) • Programme for growth of English learning in years 3/4 and other curricular enrichment activities in primary education • Growth of English learning in all years of primary education • Definition of the growth, recurrence, results dissemination and analysis of national exams • Mathematics National Plan • Portuguese Language National Plan • Definition of the minimum teaching time for programmes and curriculum development in the areas of Portuguese Language, Mathematics and Environmental Studies (primary education, years 1–4) • Change in the number of teaching hours allocated to science in secondary education (experimental component) • Special Educational Needs Act

level, and on the view that all actors are responsible for the results of the organizational choices they have made when designing their educational projects. This perspective, together with the assessment of schooling based on results, suggests that a reconfiguration of the role of the state has occurred. The state is now understood to have assessment and regulatory functions, in partnership with the new actors that it is attempting to bring into the education policy arena.

The evolution of curriculum policies tends to be legitimized by market ideology: knowledge is conceived as competences passed on to pupils; these competences qualify pupils for the labour market; and schools—and ultimately, teachers—are understood to be service-providers. On the other hand, this ideology is also visible in the establishment of a curriculum culture of reporting results (Pacheco 2007).

We think that a market ideology can be seen in all the curriculum reorganizations that occurred in the 1990s. In that decade competences and new ways of managing in the curriculum emerged, along with new ways of organizing and regulating education, most based on measuring student outcomes. On the other hand, the diversification of education and training routes can also be seen as a consequence of the market ideology and its utilitarian perspective on schooling: this design is mostly linked with the market needs and the seeking of flexibility and efficiency.

In Portugal, in contrast to what may have happened in other countries, we cannot isolate the effect of the PISA results from the effect of the measures undertaken by the EU. Indeed, there is an overlap that has resulted in a mixing of all the directives coming from assessment project like PISA and from the resolutions of co-operation between the member-states of OECD, the EU, and the like.²²

In this context the Portuguese PISA 2000 results were not surprising: there was already an awareness of the fact that pupils probably would not perform well in literacy tests due to two factors:

- Portugal participated in national²³ and international²⁴ surveys on literacy and both reported very similar results: the major part of the participant population scored at the two lowest levels.
- An internal analysis had taken place, which had been proposed in 1997²⁵ and 1998,²⁶ before the 'Reorganization of the Compulsory Schooling Curriculum', was carried out by most schools in 2001. This analysis diagnosed some problems in compulsory schooling relating mainly to curricular organization and management and schools' autonomy and assessment. These issues were identified as being the main cause of pupils' low attainment and performance.²⁷

Nevertheless, the PISA results had consequences for national curriculum policies. Despite the fact that no amendments have actually been made to the national curriculum, it is possible to identify two phases in the impact of the PISA results:

- During the period of the centre-right government (PSD–PP), national assessments in the Portuguese language and mathematics were introduced at the compulsory schooling level; and

- During the socialist government (PS) that came into power in 2005, a set of programmes and measures were outlined and implemented to counteract the poor results reported in the PISA assessments.

The PISA results did indicate that, in terms of reading and mathematical skills, Portuguese pupils ranked below the mean of the OECD countries, and, in some cases, scored below pupils from non-member countries. As a result, in 2005, the government decided to implement measures to enhance the performance of Portuguese pupils. We highlight the following:

- National Reading Plan;
- Full-time school programme;
- National Mathematics Plan;
- National Portuguese Language Programme;
- The definition of teaching time for each curricular area in primary education;
- New framework for national testing;
- New framework for providing support to foreign pupils; and
- Reinforcement of the laboratory component in the teaching of science.

In other words, the results of the OECD's 'Education at a Glance' also have had a strong impact on national policies. This impact became more noticeable after 2000 in areas such as school organization, the learning environment, learning impact, the output of educational institutions, and access to education, participation, and progress. Some of the measures mentioned in table 1 may be analysed taking into consideration these results, namely those concerning the change of the Employment Statute for Educational Professionals, the development of professional and education/training courses, the increase in social benefits for pupils from deprived backgrounds,²⁸ and the change of vocational routes and assessment in secondary education.

On the other hand, public investment in education has remained more or less the same over the last 8 years; indeed, there have been lower expenditures in compulsory and secondary education as well as a 'rationalization' of human resources, i.e. teachers and school staffs (Aníbal 2007). In addition, the measures that have been undertaken to have third-party actors (i.e. local councils, language schools, etc.) delivering English courses, sports activities, or music lessons in primary education demonstrate a reconfiguration of the role of the state in the field of education.

The 'Europeanization' of education is a process that is also very visible in Portugal. It has had significant consequences for the curriculum: the introduction of ICT as a curricular subject; the reinforcement of the teaching of a second foreign language; and the introduction of non-compulsory curricular areas ('Learning support'; 'Civic education'). 'Education for citizenship', ICT, and skills in the Portuguese language are now all key areas of the curriculum, along with the growth in the teaching of English in primary education.²⁹ All programmes, national action plans, and projects³⁰ launched by the Ministry of Education are intended to contribute to bringing Portugal closer to the other countries in respect to the EU targets. For Portugal, the achievement of those targets requires substantial development.

As we have tried to show, national reconfigurations occurred in a visible way at the policy level. The priorities and aims of the different Portuguese governments are those highlighted by global and regional agendas. There are national policy reconfigurations but the routes and strategies to achieve the aims and the priorities defined in the international agendas are constructed by national actors within national and local spaces. The Portuguese National Reading Plan, National Mathematics Plan, and Full-time School Programme can be seen as examples of how Portuguese actors sought to improve student results in PISA. In other words, the achievement of EU benchmarks and better results in PISA are very significant in policy-making in Portugal. However, there is always a freedom to choose and define the ways and means used to achieve those aims.

Final considerations

As we have tried to demonstrate, there is a close relationship between global and regional agendas and national policy-making in education. In fact, the concept of agenda refers to:

the set of tensions and contradictions that characterizes the role of the state in social and democratic capitalist formations, and that is specified by the highlighted central problems as well as by the way and the priority these problems have in a particular occasion, situation, or context. (Antunes 2001: 167)

The Portuguese case shows that global and regional agendas are taken in two ways: they define a mandate indicating what is expected to be done to solve the identified problems; and they are a way of legitimizing state policies.

We contend that Dale's (1999, 2001) analysis of the existence of a 'Global structure agenda for education' can be seen in the Portuguese case. There is a set of priorities for education advocated by global organizations to improve the country's economic growth. However, there is no discussion of the curriculum in Portugal—either of its organization or its contents. There has been no discussion of knowledge organization or learning, only a discussion of teaching techniques and school organization. There has not been a paradigmatic change in the understanding of the curriculum because new concepts and conceptualizations have been joined to old curriculum concepts.

To conclude, we underline that educational discourse in Portugal is currently bound up in ideas of efficiency and efficacy. These ideas became prominent when education policies were delineated in such a way as to create a 'totally pedagogized society' (Bernstein 2001)—where a new role is attributed to the state and a new 'trainability' emerges. It is in this context that political decisions are made, influenced by a mixture of the directives of global and regional organizations, as well as by the local approaches to education.

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Notes

1. Founded in 1961, OECD is an intergovernmental institution with considerable influence on its member countries. Within the OECD framework, education has been increasingly growing in relevance; it acquired a central role in debates around the competitiveness of national economies—framed within an understanding of human capital and the emergence of the knowledge-based economy. OECD does not provide prescriptive mandates for its member countries. Instead, it works through the building of consensus.
2. OECD focused on two areas at the end of the 1990s: assessment of how schools work; and external assessment of learning.
3. The PISA studies aim to measure 15-year-olds' ability to face the challenges of real life. The project is conducted in 3-year cycles: the first data collection took place in 2000 and the main area of assessment was reading literacy. Motivation, attitudes towards learning, familiarity with computers, and pupils' ability to manage and monitor their own learning were also assessed. PISA 2003 looked more closely at mathematical literacy and problem-solving skills; PISA 2006 focused on scientific literacy.
4. In particular, the Indicators of Educational Systems (INES) project, undertaken by OECD's Centre for Educational Research and Innovation (CERI). CERI is understood to be a globalizing agency playing a decisive role as an international knowledge mediator in shaping understanding about education (Henry *et al.* 2001; for INES, see US Department of Education n.d.).
5. This relationship between national education policies and the initiatives of international organizations, assuming a character of legitimization and mandate, may be illustrated by what occurred in Portugal between the post-war period and the integration into the European Economic Community (Teodoro 2001).
6. According to Santos (1995, 1997), we should use the term '*globalizations*' rather than the singular form. We can distinguish four modes of production of globalization: two of the modes are mainly hegemonic and achieved through top-down imposition—'globalized localism' and 'localized globalism', and the two other are counter-hegemonic and emerge through down-top mechanisms—'cosmopolitanism' and 'common heritage of humankind'.
7. See Cox and Sinclair (1996), Hettne (1995), and Mittelman (1996).
8. According to Dale (2001: 146–147), globalization is made up of three interlinked classes of activity: economic, political, and cultural activities, characterized by 'hyper-liberalism, governance without government, and marketization and consumerism, respectively'.
9. Santos (2001) distinguishes two types of globalization intensity: 'high-' and 'low-intensity' globalization. Where the mediation of nation-states is required for the formulation of, e.g. education policies, we may identify a 'low-intensity globalization'. In other areas, such as finance, international trade, or tourism, where nation-states have practically abandoned their regulatory functions, we have 'high-intensity globalization'.
10. The EU area of intervention was created by the Maastricht Treaty in 1992. Aimed at supporting and contributing to the development of the actions of member-states, they maintained full responsibility for the organization and curricula of their education systems. However, the conditions were created to increase the future scope of action of the EU, which occurred in 2000 with the so-called 'Lisbon Strategy'.

11. The software industry has become one of the main new educational actors; see, e.g. the Negroponte Project, 'One Laptop per Child' (http://wiki.laptop.org/go/The_OLPC_Wiki, accessed 25 February 2010) and the Magalhães Project in Venezuela and Portugal (<http://www.portatilmagalhaes.com>, accessed 25 February 2010).
12. See Anibal (2007).
13. And the education policies of other countries which participate in some of the surveys.
14. Their formulation and design have undergone several changes, namely with respect to the indicators used in the project *Education at a Glance*.
15. See Mendes and Galego (2009).
16. Although all these areas were included in the three data collections, one was privileged each time.
17. These policies were not only addressed to the member states of the EU but also to the candidate states which at that time had not been integrated into the EU.
18. During the Barcelona Summit, the working group on the 'key competences' for the 21st century proposed reducing the range of hypotheses for the number of competences to be defined, understanding these competences to be interlinked with knowledge, skills, and attitudes.
19. These benchmarks were reformulated in May 2003 but only a few amendments to the earlier targets were made. See Council of the European Union (2003).
20. Lyotard (2006: 93) defines 'optimization of performances' as a search for a 'better relation between input/output', allowing for an opening up of a 'large market of operative competences'.
21. The reduction of the number of teachers in the non-compulsory curriculum areas in years 7–9 of compulsory schooling, the establishment of time allocations for the primary school curricular areas, and the creation of guidelines for pre-school education programmes of study as well as for non-compulsory curricular areas.
22. See e.g. Education and Training 2010, an EU Project (Commission of the European Communities 2001, Council of the European Union 2001).
23. Benavente *et al.* (1996) was based on this study.
24. See Elley (1992).
25. See Ministério da Educação (1997).
26. See Ministério da Educação (1998).
27. In fact, multicultural classrooms and teachers' difficulty in managing them, the content-based curriculum being used, poor curricular implementation, and the concept of the teacher as a curriculum 'consumer' are some of the explanations these reports give to justify the low scores reported by the literacy studies.
28. The Portuguese Minister of Education stated in an interview the Portuguese public television channel RTP1 that the OECD's 2007 *Education at a Glance* showed that the Portuguese education system was very closed and did not promote social mobility, thus, there was the need to include secondary education pupils (years 14–18) in the existent social benefits scheme (3rd September 2007).
29. Centres for the Recognition, Validation and Certification of Competences were created by legislation in which explicit reference is made to the Lisbon European Council's conclusions and the considerations around life-long learning.
30. For an example, see the 'Projecto Nacional de Educação para o Empreendedorismo' [National project of education for entrepreneurship], launched in 2007, or the contest 'A União Europeia e a Não Discriminação' [The European Union and non-discrimination], initiated 22nd October 2007, both promoted by the Ministry of Education.

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